

Health and Retirement Study (HRS)

2024 Core Early, Version 1

September 2026

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, 2022 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, 2022 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 hrrpublications@umich.edu.
- Report immediately to the Health and Retirement Study at hrrquestions@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 hrrquestions@umich.edu of changes in your electronic mail address, postal address, telephone number, organizational affiliation or organizational status.

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1. Data Description and Usage

1A. Overview

The 2024 HRS Core (Early, Version 1.0) 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 (NIA U01 AG009740) and Social Security Administration provided funding. The Institute for Social Research (ISR) Survey Research Center (SRC) at the University of Michigan conducted the survey.

The 2024 HRS Core (Early, Version 1.0) is an early public release that includes cases from the eight continuing HRS cohorts (HRS, AHEAD, CODA, WAR BABY, EARLY BABY BOOMER (EBB), MID BABY BOOMER (MBB), LATE BABY BOOMER (LBB) and EARLY GENERATION X (EGENX)). EGENX households finalized on or after January 1, 2024 are considered part of the 2024 HRS data collection. Data from these EGENX cases are currently available separately in the [2022 Extended New Cohort data release](#). They will be combined with the 2024 HRS panel data and included in the 2024 HRS Core (Final, Version 1.0) release in the future.

HRS early data releases are provided for users who wish to begin analyzing data prior to a final public release being available. Early release files have undergone a fair amount of data cleaning but errors may be present in the data files and/or documentation.

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.

1B. The Sample Interviewed in 2024

The data collection period pertaining to this public release was May 2024 through August 2025. The HRS sample is comprised of eight sub-samples (HRS, AHEAD, CODA, WAR BABY, EBB, MBB, LBB and EGENX).

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.

The Early Generation X (EGENX) sub-sample consists of people who were born between 1966 and 1971 and whose household was first interviewed in 2022/2023 (refer to the [2022 HRS Final Core](#) data product) OR 2024/2025 (refer to the [2022 HRS Extended New Cohort](#) data product). The EGENX sub-sample was interviewed in 2022-2025 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), 2016 (LBB) or 2022 (EGENX). For more details about the sample, see our [Web site](#).

1C. Changes in this Early release

For this 2024 HRS Core (Early, Version 1.0) data release, users should note that HRS has not performed all the processing typical of an early release, for both the data and documentation, which are subject to change based on any corrections deemed necessary in the future. Summarized below are the processing task that were not finalized at the time of this data release. These components will be included in a subsequent release.

- **detailed codebook** – the standard HTML and ASCII formatted codebooks are not available with this release. Instead, we provide a basic codebook and frequency listing for each of the section files. Researchers will need to refer to the questionnaire for question text, ask rules, etc.
- **Other Person Numbers (OPNs)** - The OPN is a unique value assigned to a child or household member when first mentioned by a respondent. This variable is used to identify that child or household member for all subsequent waves of the study (unless they drop out of the study and later come back in) and is also used to perform file merges. OPNS are necessary to facilitate merging of information obtained about children and other household members. At the time of this data release, OPN values had not been finalized and as a result they are not included in the files. Given that OPN variables will not have data, researchers will need to rely on other variables to perform merges. Refer to [Appendix B](#) for more information about how to merge without OPNs and for sample code.
- **Web cognition scoring** - Some Cognition measures in Section D require additional review by HRS Staff. The variables listed below are under review for web respondents and will be made available in a subsequent data release.
 - Immediate Word Recall (D182W, D174W, D175W, D176W, D177W)
 - Delayed Word Recall (D183W, D184W, D185W, D186W, D187W, D191W)
 - Speed Tests (D237WA, D237WC, D237WT, D238WA, D238WC, D238WT)

- Number Series (D400-D435, D216W, D217W, TNSSCORE, TNSSCORESE)

1D. 2024 Questionnaire Sections

2024 Section	Content
PR	Preload
A	Coverscreen
B	Demographics
C	Physical Health
D	Cognition
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
V	Modules
W	Event History, Internet Use and Social Security
Y	Time Calculations
IO	Interviewer Observations

LB	Leave-Behind Questionnaires
TN	Thumbnails

1E. Levels of Files

In the 2024 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 2024 HRS Core (Early, Version 1.0), contains files at seven other levels: household-member-and-child, sibling, helper, transfer-to-child, transfer-from-child, jobs, and pension.

1E1. 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 and R) 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 HRS 2024.

1E2. 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 HRS 2024.

1E3. 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, H24PR_SB.

1E4. 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.

1E5. 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.

1E6. 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.

1E7. 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.

1E8. 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.

1E9. 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

The data files have a prefix of "h24" which identifies it as HRS 2024. The prefix is followed by a letter (or two) designating the questionnaire section, a "_" separator, and then one or two additional letters to designate the file level.

- 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 H24A_R includes variables from Section A (coverscreen) at the respondent level, whereas, H24A_H contains variables from Section A (coverscreen) at the household level.

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

- .da for data files,
- .xml for XML files,
- .csv for CSV 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 36 data files for the 2024 HRS Core (Early, Version 1.0) data release. For example,

H24A_R.da contains respondent data from Section A,
 H24A_R.xml contains respondent XML files from Section A,
 H24A_R.csv contains respondent CSV files from Section A,
 H24A_R.sas contains corresponding SAS program statements,
 H24A_R.sas7bdat contains “ready-to-use” data in SAS format
 H24A_R.sps contains corresponding SPSS program statements,
 H24A_R.sav contains “ready-to-use” data in SPSS format
 H24A_R.do contains corresponding Stata DO statements,
 H24A_R.dct contains corresponding Stata dictionary statements,
 H24A_R.dta contains “ready-to-use” data in Stata format, and
 H24A_R.txt contains the ASCII codebook.

3. Data Files

The 2024 HRS Core (Early, Version 1.0) data are distributed in 36 data files. The files are listed below along with the number of cases (#CASES), number of variables (#VARS), and the primary identifiers (IDs). The records in the data files are sorted in order by these primary identifiers.

FILENAME	CASES	# VARS	FILE LEVEL	IDs
H24A_H	10804	46	household	HHID, TSUBHH
H24E_H	10804	142	household	HHID, TSUBHH
H24H_H	10804	236	household	HHID, TSUBHH
H24PR_H	10804	46	household	HHID, TSUBHH
H24Q_H	10804	745	household	HHID, TSUBHH
H24R_H	10804	114	household	HHID, TSUBHH
H24A_R	14398	37	respondent	HHID, PN, TSUBHH
H24B_R	14398	166	respondent	HHID, PN, TSUBHH
H24C_R	14398	251	respondent	HHID, PN, TSUBHH
H24D_R	14398	293	respondent	HHID, PN, TSUBHH
H24F_R	14398	184	respondent	HHID, PN, TSUBHH
H24G_R	14398	154	respondent	HHID, PN, TSUBHH
H24I_R	14398	168	respondent	HHID, PN, TSUBHH
H24J_R	14398	635	respondent	HHID, PN, TSUBHH
H24J3_R	14398	180	respondent	HHID, PN, TSUBHH
H24LB_R	14398	467	respondent	HHID, PN, TSUBHH
H24M_R	14398	268	respondent	HHID, PN, TSUBHH
H24N_R	14398	383	respondent	HHID, PN, TSUBHH
H24P_R	14398	37	respondent	HHID, PN, TSUBHH
H24PR_R	14398	181	respondent	HHID, PN, TSUBHH
H24S_R	14398	114	respondent	HHID, PN, TSUBHH
H24T_R	14398	113	respondent	HHID, PN, TSUBHH
H24TN_R	14398	19	respondent	HHID, PN, TSUBHH
H24V_R	14398	120	respondent	HHID, PN, TSUBHH
H24W_R	14398	17	respondent	HHID, PN, TSUBHH
H24Y_R	14398	32	respondent	HHID, PN, TSUBHH

FILENAME	CASES	# VARS	FILE LEVEL	IDs
H24E_FC	1046	26	transfer-from-child	Refer to Appendix B
H24E_TC	4655	24	transfer-to-child	Refer to Appendix B
H24G_HP	4048	31	helper	Refer to Appendix B
H24PR_P	7351	17	pension	HHID, PN, Z505
H24J2_P	7769	185	pension	HHID, PN, Z505
H24PR_JB	25778	16	jobs	HHID, PN, Z502
H24E_MC	48878	30	household member and child	Refer to Appendix B
H24PR_MC	78736	26	household member and child	Refer to Appendix B
H24F_SB	13033	29	sibling	Refer to Appendix B
H24PR_SB	13033	16	sibling	Refer to Appendix B

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

At the time this data was published, the interviewer observation data were still undergoing cleaning. We plan to make them available in a subsequent data release.

4. Identification Variables

Identification variables for HRS 2024 are stored in character format.

4A. Primary Identification Variables

Several variables, HHID, TSUBHH, SSUBHH, 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 for a given cohort, each sample household gets 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. TSUBHH – Sub-household Identifier

In combination with HHID, TSUBHH uniquely identifies a household at the time of the 2024 interview. Sub-household identifiers can be different at each wave. TSUBHH 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

As noted previously, at the time of this data release, OPN values had not been finalized and as a result they are not included in the provided files. OPNs are necessary to facilitate merging of information obtained about children and other household members. Since OPN variables will not have data, researchers will need to rely on other variables to perform merges. Refer to Appendix B for more information about how to merge without OPNs and for sample code. OPNs will be made available in a subsequent release.

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

The identification variables listed below are needed to uniquely identify records in the dataset types named.

- respondent-level datasets:
 - 1) HHID HOUSEHOLD IDENTIFICATION NUMBER
 - 2) PN RESPONDENT PERSON IDENTIFICATION NUMBER
- household-level datasets:
 - 1) HHID HOUSEHOLD IDENTIFICATION NUMBER
 - 2) TSUBHH 2024 SUB HOUSEHOLD IDENTIFICATION NUMBER
- helper-level datasets:
 - 1) HHID HOUSEHOLD IDENTIFICATION NUMBER
 - 2) PN RESPONDENT PERSON IDENTIFICATION NUMBER

- 3) OPN¹ Not available - refer to [Appendix B](#)
- household-member-and-child-level datasets:
 - 1) HHID HOUSEHOLD IDENTIFICATION NUMBER
 - 2) TSUBHH 2024 SUB HOUSEHOLD IDENTIFICATION NUMBER
 - 3) OPN¹ Not available - refer to [Appendix B](#)
- sibling-level datasets:
 - 1) HHID HOUSEHOLD IDENTIFICATION NUMBER
 - 2) PN RESPONDENT PERSON IDENTIFICATION NUMBER
 - 3) OPN¹ Not available - refer to [Appendix B](#)
- transfer-to and transfer-from child-level datasets:
 - 1) HHID HOUSEHOLD IDENTIFICATION NUMBER
 - 2) TSUBHH 2022 ENC SUB HOUSEHOLD IDENTIFICATION NUMBER
 - 3) OPN¹ Not available - refer to [Appendix B](#)
- pension-level datasets:
 - 1) HHID HOUSEHOLD IDENTIFICATION NUMBER
 - 2) PN RESPONDENT PERSON IDENTIFICATION NUMBER
 - 3) Z505 PENSION TRACKING NUMBER
- job-level datasets:
 - 1) HHID HOUSEHOLD IDENTIFICATION NUMBER
 - 2) PN RESPONDENT PERSON IDENTIFICATION NUMBER
 - 3) Z502 JOB TRACKING NUMBER

¹ At the time of this data release, Other Person Number (OPN) values had not been finalized and as a result they are not included in the files. Given that OPN variables will not have data, researchers will need to rely on other variables to perform merges. Refer to [Appendix B](#) for more information about how to merge without OPNs and for sample code.

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

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

TSUBHH 2024 SUB HOUSEHOLD IDENTIFICATION NUMBER

TPN_SP 2024 SPOUSE/PARTNER PERSON NUMBER

TCSR 2024 WHETHER COVERSHEET RESPONDENT

TFAMR 2024 WHETHER FAMILY RESPONDENT

TFINR 2024 WHETHER FINANCIAL RESPONDENT

Secondary Identification Variables for

- Household-level datasets
- household member or child level datasets
- transfer-from-child-level datasets and
- transfer-to-child-level datasets

TSUBHH 2024 SUB HOUSEHOLD IDENTIFICATION NUMBER

TPN_CS PERSON NUMBER OF COVER SCREEN RESPONDENT

TPN_FAM 2024 FAMILY RESP PERSON NUMBER

TPN_FIN 2024 FINANCIAL RESP PERSON NUMBER

TPN_NCS 2024 NON-COVERSCREEN RESP PERSON NUMBER

TPN_NFAM 2024 NON-FAMILY RESP PERSON NUMBER

TPN_NFIN 2024 NON-FINANCIAL RESP PERSON NUMBER

5. Distribution Files and Directory Structure

5A. Distribution Files

The files are packaged for download from our web site as one large .zip file, h24core.zip, that contains several smaller .zip files and this data description document, h24dd.pdf.

The individual .zip files for separate download are:

- ASCII data files
 - h24da.zip contains data files
 - h24csv.zip contains CSV files
 - h24xml.zip contains XML files

Note: Some HRS variables (e.g. HHID, PN, OPN, etc.) contain data that have leading zeros. When importing these formats to the application of choice, users should be mindful that leading zeros may be present and will need to account for them so that they are maintained.

- Program statements and “ready-to-use” files
 - h24sas.zip contains SAS program statements (.sas) and “ready-to-use” files (.sas7bdat)
 - Hh4sps.zip contains SPSS program statements (.sps) and “ready-to-use” files (.sav)
 - h24sta.zip contains Stata program statements (.do), dictionary statements (.dct) and “ready-to-use” files (.dta)
- Documentation files
 - h24cb.zip contains the basic codebook files
 - h24fre.zip contains the frequency outputs
 - h24qn.zip contains the questionnaire files
 - 24dd.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:\hrs2024	Files downloaded from Web site
c:\hrs2024\codebook	Unzipped files from h24cb.zip
c:\hrs2024\data	Unzipped files from h24da.zip
c:\hrs2024\qnaire	Unzipped files from h24qn.zip
c:\hrs2024\sas	Unzipped files from h24sas.zip
c:\hrs2024\spss	Unzipped files from h24sps.zip
c:\hrs2024\stata	Unzipped files from h24sta.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 h24A_R.SAS go with the h24A_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:\hrs2024\sas" and the data file is located in "c:\hrs2024\data", you can run the file as is. A SAS system file (*.sas7bdat) will be saved to directory "c:\hrs2024\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:\hrs2024\spss" and the data file is located in "c:\hrs2024\data", you can run the file as is. An SPSS system file (*.sav) will be saved to directory "c:\hrs2024\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:\hrs2024\Stata" and the data file is located in "c:\hrs2024\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.

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.

8. Documentation

The documentation available for use with the 2024 HRS Core (Early, Version 1.0) includes codebooks, questionnaires, frequency outputs and this data description.

8A. Codebook

The HRS 2024 Codebook is provided as a series of plain text files, one for each data file, that include the variable name, type (numeric/character), length, variable label and variable number which indicates its position in the file.

8A1. Variable Names

Variable names begin with "T" for 2024 and are followed by the section letter, and numbers after the section letter. For example, TC001 where T=2024, C=section C (physical health), and 001 is the variable number. Variables from the preload section of the instrument will have either TX or TZ 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:

TX007_R RESP FAM/FIN TYPE – UPDATED

TZ077_R PREV WAVE R FIN/FAM TYPE

TX007_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 2024 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, TF113M1 through TF113M3 are 2024 variables from section F with one through 3 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, TF114_1M1, is a 2022 Extended New Cohort variable from section F, variable number 114 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., TF107_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, TJW776_1M1, is a 2022 variable from section J variable number 776 in the first iteration of the loop, and the first mention.

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 TA076M (CURRENT RESIDENCE 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. These appear as blanks in the data. Data from these types of questions should be available, where possible, in the Final data release.

8B. Other Documentation

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

8B1. 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>

8B2. 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 HRS 2024 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 2024 instrument. Changes can be found by searching for “#@” in the document.

8B3. 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.

Note: At the time this data was published, the Cross-Wave Tracker file was in development for 2024 cases.

9. Additional Notes

The following are miscellaneous additional notes regarding the 2024 HRS Core (Early, Version 1.0). 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. The household records for these households contain blank 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:

TPN_FAM – 2024 FAMILY RESP PERSON NUMBER

TPN_FIN – 2024 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.

9C. Modules for the 2024 Data Collection

There are 5 modules for 2024 HRS. The module data can be found in the file H24V_R. Topical areas of the modules include:

MODULE 1: Prescription Drug Advertising

MODULE 2: Phobias

MODULE 3: Accountable Health Communities Screening

MODULE 4: Experience and Expectation of Unmet Needs

MODULE 5: Positive Childhood Experiences

9D. 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 2020 Core.

SUBHH - The Tracker File assigns a '9' for all new spouses in 2020 for the previous wave's SUBHH number. The 2020 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.

PN_SP - Even if a spouse did not give an interview in 2020, a spouse PN (PN_SP) will exist in the core data. Additionally, for a non-original R's new spouse, we assign a spouse PN (PN_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 PN_FIN, and PN_FAM in the household sections. The tracker file will simply list the assignments of the people interviewed. Therefore, for example, the 2020 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 2020 data (B063) 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 2020 Core Final data was not changed using outside sources, in order to preserve the flow through the instrument for respondents.

9E. 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.

9F. Web

In 2024, HRS is administering its fourth 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. Households previously selected as Web eligible 2020 remain Web eligible as long as they continue to meet eligibility criteria 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). In addition, any new or previously ineligible households are also eligible for Web in 2024 based on the same eligibility criteria.

In total, 3,815 eligible households were identified. By design, 60% of eligible LBB or EGENX households, and 75% of all older cohort households, were to be assigned to receive a web invitation, with the remainder receiving their usual mode of either telephone or face-to-face. This resulted in 2,668 eligible households identified to receive the Web invitation and 1,147 eligible households not receiving the Web invitation. However, there was a programming error in that 453 households did not receive the Web invitation as intended. Thus, the overall designation was not random and should not be used to study mode effect in the 2024 wave.

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 with values of “-8” 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 questionnaire contains a complete description of the interview content by section including question wording, order and flow.

Section D Cognition

The variables that comprise the Section D Web Number Series and Web Immediate and Delayed Word Recall (listed below) are under review and will be made available in a subsequent data release.

Variable Names and Descriptions for Immediate Word Recall

- TD182WM# WEB WORD RECALL IMMEDIATE
 - Note: # denotes the multiple mention indicator 1, 2, 3, etc.
- TD174W WEB NUMBER GOOD - IMMEDIATE
- TD175W WEB NUMBER WRONG - IMMEDIATE
- TD176W WEB NUMBER FORGOTTEN - IMMEDIATE
- TD177W WEB NONE REMEMBERED - IMMEDIATE – FLAG

Variable Names and Descriptions for Delayed Word Recall

- TD183WM# WEB WORD RECALL DELAYED
 - Note: # denotes the multiple mention indicator 1, 2, 3, etc.
- TD184W WEB NUMBER GOOD - DELAYED
- TD185W WEB NUMBER WRONG - DELAYED
- TD186W WEB NUMBER FORGOTTEN - DELAYED
- TD187W WEB NONE REMEMBERED - DELAYED
- TD191W WEB WORD LIST CHECK DID R USE AID

The CALCULATED NUMBER SERIES SCORE (TNSSCORE) and STANDARD ERROR OF NUMBER SERIES SCORE (TNSSCORESE) variables in Section D require additional review by HRS Staff. These variables are under review and will be made available in a subsequent data release.

9G. Questionnaire Changes

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 2024 instrument. Data users can identify question text and other changes by searching for “#@” document. The commented box and arrow questionnaires are available in the download set (h24qn.zip). Data Model changes are described in Appendix C ([link](#)).

9H. 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 respondents (regardless of mode of interview or preferred language), provided they were not in a nursing home.

9I. Errata

Duplicate Respondents

There are a few known duplicate respondents in this release. These will be resolved in the 2024 HRS Final Core data release.

HHID PN 086903 021 and HHID PN 086903 022 represent the same respondent. The 086903 021 record will be retained, while the 086903 022 record will be deleted.

Information associated with 086903 022 will be transferred to 086903 021. These changes will be incorporated into the 2024 HRS Final Core data release.

HHID PN 540532 010 and HHID PN 557889 010 are duplicate respondents. HHID PN 540532 010 is the record that is being retained. HHID PN 557889 010 will be deleted. This will be reflected in the 2024 Final Core data release.

HHID PN 554793 010 and HHID PN 903231 020 are the same respondent. The HHID PN 903231 020 record will be retained, while the HHID PN 554793 010 record will be deleted. Information associated with 554793 010 will be transferred to 903231 020. These changes will be incorporated into the 2024 HRS Final Core data release.

HHID PN 551123 011 and HHID PN 553700 010 are the same respondent. The HHID PN 551123 011 record will be retained but assigned to a new HHID PN 551123 020. The HHID PN 553700 010 record will be deleted. These changes will be incorporated into the 2024 HRS Final Core data release.

Five Special Crossover Cases

The following five HHID and PNs were included in the 2022 data collection and initially finalized as non-interviews in 2022 or 2023. Their cases were later reopened in 2024/2025, interviews were completed for them and the records were re-finalized in 2024 or 2025. These households are now part of the 2024 data collection. Their data has been set to missing and will be made available in the 2024 HRS Final Core data release. Their HHID/PNs are:

- 550093/010
- 555623/010
- 556854/010
- 558280/020
- 559565/020

Question Text Discrepancy for Variable V503

There was a discrepancy between the English and Spanish question text for Section V, variable V503. The Spanish version of the questionnaire did not include the word "sometimes" in the question text. The English question text read *"Before the age of 18 how often did you feel your family stood by you during difficult times -- never, rarely, sometimes, often, or very often?"*. The Spanish question text read *"Before the age of 18 how often did you feel your family stood by you during difficult times -- never, rarely, sometimes, often, or very often?"* Respondents were still allowed to select "sometimes" (option 3) as an answer but it was missing from the Spanish question text in Spanish.

D432 (Number Series) programming error that affected web respondents

Due to a programming error, variable D432 in HRS 2024 Section D: Cognition had a problem that affected for a subset of web respondents. This variable is part of the second set of version 2 Number Series items, administered to respondents randomly assigned to version 2 who answered two items correctly in the first set. Because the Number Series follows a block-adaptive design, an error in one second-set item has limited influence on the overall score. The programming error caused the displayed number sequence to appear incorrectly to respondents. This issue was corrected when Data Model 3 was released.

9J. Summary of Data Model (DM) Changes during 2024 Production

During the field period, we made changes to the instrument 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 C ([Appendix C link](#)). The variable TVDATE (which corresponds to the field DM Version in the table provided in the Appendix) exists in all the data files and it describes what version of the data model was used to collect a given interview.

9K. New and/or Modified Questions in HRS 2024

The list below summarizes new and/or modified questions in the HRS 2024 instrument. Note: “codeframe” is the possible value(s) for each variable and a brief explanation of what the codes represent.

Section	Variable	Description	Change
A	A256	R HAD COVID WHEN DIED	Changed Flow
A	A050	NEW COHORT-CHOOSE FIN R	New Instruction
A	A067	FACILITY LOCATION CITY/ST'	Modify Screen Format
A2	X060	child/household member SEX	Modified codeframe
A2	A960	(CHILD) SEX OF SPOUS OF CHILD	Modified codeframe
A2	A208	(HHM)ANY OTHER HOUSEHOLD MEMBERS?	New Instruction
B	B132	INTRO-DEMOGRAPHICS	Changed Flow
B	B085 - B087	US CITIZENSHIP	Changed Flow
B	B098 - B129	CHILDHOOD HEALTH SERIES	Changed Flow
B	B119	Childhood Concussion or Severe Head Injury	Dropped Question
B	B138	LANGUAGE SPOKEN	Changed Flow
B	B055	NEW MARRIAGE SINCE PREVIOUS WAVE	Changed Flow
B	B056	BETWEEN WAVE MARRIAGE START-MONTH	Changed Question Text
C	C298	PRESCRIPTION FOR MEMORY PROBLEM	Changed Flow
C	C342	INTRAVENEOUS MEDS - ALZHEIMERS	New Question

Section	Variable	Description	Change
C	C273	EVER HAD DEMENTIA	Changed Flow
C	C210	PRESCRIPTION FOR MEMORY PROBLEM	Changed Flow
C	C343	INTRAVENEOUS MEDS – MEMORY	New Question
C	C327	COVID VACCINE	Changed Flow
C	C329	COVID VACCINE DAY	Dropped Question
C	C095	RATE EYESIGHT	Modified codeframe
C	C317	MACULAR DEGENERATION	Changed Flow
C	C331	COVID STATEMENTS	Changed Flow
C	C331	COVID STATEMENTS	Changed Question Text
C	C344- C347	COVID	New Question
C	C348 -C349	COVID	New Question
C	F251	CLOSE FRIENDS/FAMILY DIE FROM COVID	Dropped Question
C	C320	FIT OR COLOGUARD TEST YR	Dropped Question
C	C340 -C341	CONCUSSIONS	New Question
C	C321	EVER VAPED	Changed Flow
C	C297	WEAK IMMUNE SYSTEM	Flow Correction
C	C048	CONGESTIVE HEART FAILURE	Changed Flow
C	C128	EVER DRINK ALCOHOL	Modified codeframe

Section	Variable	Description	Change
C	C053_Stroke	STROKE	Changed Flow
C	C237	COVID VACCINE	Changed Flow
C	C347	COVID HOSPITAL ADMITTANCE	Dropped Question
C	C253	HOW OLD FINISHED MENOPAUSE	New code
C	C303	TIME SITTING MINUTES/HOURS	Changed Flow
D	D339 - D349	SAMPLE A TEST INTRO	Changed Flow
D	D339, D342, D345, D348		Changed Flow
D	D340/D341, D343/D344, D346/D347, D349/D350		Modified Codeframe
D	D355	USED AID-VOCAB TEST	Changed Flow
E	E081	TOTAL TRANS. TO CHILD	Corrected Flow
E	E046	# GRANDCHILDREN TOTAL	Corrected Assignment
E	E013, E014, and E126_E057		Experiment
E	A100, E013/E014 and E146		Corrected Assignment
E	E137_E076	WHICH CHILD GIVEN LARGEST AMOUNT	Corrected Assignment
E	E160	CHILD(REN) LIVE > 10 MILES MOVE	Corrected Flow
H	H001	LIVE FARM OR RANCH	Changed Flow
H	H002	Type home	Changed Question Text
H	H101	Retire-senior complex	Changed Flow

Section	Variable	Description	Change
H	H102	LUMP-SUM TO JOIN RETIRE/SENIOR COMM	Changed Question Text
H	U001 - U006	Asset reconciliation 2nd home	Dropped Question
J	various ²	Amount - dollars and cents	Changed Codeframe
J	J987	COVID CONCERNS SPECIFY	New Code
J	J991	ANY WORK FROM HOME	New Question
J	J992	HRS WORKED FROM HOME	New Question
J	J993	ALLOW WORK FROM HOME	New Question
J	J994	GIG WORK	New Question
J	J995	GIG WORK EMPLOYERS	New Question
J2	W406	NOW	Changed Codeframe
J2	W823	PLAN DUPLICATE OF	New Question
M	M100	WHY NEVER WORKED	Changed Flow
M	M100	WHY NEVER WORKED	Changed Flow
M	M103	EXPECT HEALTH PROB IMPROVE	Changed Flow
M	M118	KEEP FROM WRKG	Changed Flow
M	M342	VOCATIONAL REHAB	New Question

² List of variables affected by this change: J032, J195, J039, J067, J188, J206, J215, J216, J222, J228, J230, J233, J257, J521, J529, J558, J600, J627 K015, K025, L022

Section	Variable	Description	Change
M	M151	Amount - dollars and cents	Changed Codeframe
M	M202	EMPLOYER MAKE ACCOMODATIONS	Changed Codeframe
M	M241	EVER APPLY FOR SSDI	Changed Flow
M	M242	REASON NOT APPLY SSDI	Changed Flow
M	M254	SSDI STILL RECEIVING BENEFITS	Changed Flow
M	M305	VA STILL RECEIVING BENEFITS	Changed Flow
M	M326	WC HOW MANY YEARS	New Instruction
M	M219	EMPLOYER ASK-WHAT	Changed Codeframe
N	N479	quality of care during covid	Changed Flow
N	N516 - N521	Hospice	New Question
N	N291	Have usual place of care	Changed Codeframe
N	N292	Have usual place of care	Changed Codeframe
N	N474 - N475	Oxygen or Ventilator	Changed Flow
N	N305	EX HOSP - INTENSIVE CARE	Changed Flow
N/EOI	N522 - N530	Prescription Consent	Added New Rx Consent
P	P107	CHANCE MENTALLY OK AT AGE-FILL	Added probe
Q	Q113	R OR SP INCOME FR WELFARE NOT SSI	Changed Question Text
Q	Q215	PENSION RETIREMENT INCOME	Changed Question Text

Section	Variable	Description	Change
Q	Q375	OTHER ASSETS	Changed Question Text
Q	Q395	OTHER SOURCES OF INCOME	Changed Question Text
T	T904	EX MORE THAN HALF	Changed Flow
T	T242	EX INCLUDE VALUE HOUSE	Changed Flow
W	W314_W306	Soc Sec Perm Intro part 1	Changed Flow
Z	Z120	AskSSPerm_V	Changed Codeframe

9L. Major Changes to the Instrument

- Section B: Reinstated question B132, childhood health sequence and citizenship questions after deferring for one wave.
- Section C: Several new questions were added regarding Alzheimer's and dementia, covid and concussions.
- Section E: Prior to 2024, the "which child" questions had two fields. The first field was asked and the codeframe started at 1 and the 2nd field linked the person that was selected to the correct x054 index. Instead of having two fields, in 2024 we experimented with having only 1 field that was asked and also stored the correct x054 index of the person that was selected. The codeframe that was displayed did not start at 1 but showed the index (x054) of the person displayed. This change was limited to E013, E014, and E126_E057 for 2024.
- Section H: Dropped asset reconciliation sequence for second home.
- Section J: Added new questions about working from home and gig work.
- Section M: New question added about vocational rehabilitation.
- Section N: Prescription drug and lab linkage was added. Half of respondents got asked in Section N, half of respondents got asked in Section EOI.

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 hrsquestions@umich.edu with: "Attn: Papers and Publications" in the subject line.

11. HRS Contact Information

This document is intended to serve as a brief overview and to provide guidelines to using the 2024 HRS Core (Early, Version 1.0) 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.

HRS Website: <http://hrsonline.isr.umich.edu>

HRS Help Desk Form: <https://hrs.isr.umich.edu/help>

Email: hrsquestions@umich.edu

Health and Retirement Study
P.O. Box 1248
Ann Arbor, MI 48106-1248

FAX: (734) 647-1186

Appendices

Appendix A: Examples of Sub-Household and Respondent PN and OPN 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.

Note: a SUBHH value 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.

Appendix 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

Appendix 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

Appendix 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

Appendix 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

Appendix 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

Appendix 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

Appendix 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.

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)

Appendix 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.

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.

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)

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)

Appendix 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)

Appendix B: Examples of Merging without OPN values

The OPN is a unique value assigned to a child or household member when first mentioned by a respondent. This variable is used to identify that child or household member for all subsequent waves of the study (unless they drop out of the study and later come back in) and is also used to perform file merges. At the time of this data release, OPN values had not been finalized. Researchers will need to complete the merges using variables that are relevant to the type of file being used for their analysis.

For the files (E_H, E_TC, E_MC, and E_FC) containing data collected from the Family respondent, a user will need to use the HHID, TSUBHH, TPN_FAM, and the 'which child' variable(s) of interest from those files and merge them with these PR_MC variables: HHID, TSUBHH, and PN.

The sample SAS code below demonstrates how to create the "testdata" table by merging the variables HHID, TPN_FAM, TSUBHH and TE013M1 from the E_H file with the variables HHID, PN and TX054_MC from the PR_MC file. The values in TE013M1 will match the index values in TX054_MC. Note: it is necessary to do a left join because some respondents may have values of 93 (All Children) and 97 (Other Specify) which will not be in the PR_MC file.

```
proc sql;
create table testdata as
select
a.hhid
, a.TPN_FAM
, a.tsubhh
,a.Te013m1
, b.TX054_MC
, b.pn
from h22ence_h as a
left join h22encpr_mc as b
on a.hhid = b.hhid and a.tsubhh = b.tsubhh and a.TPN_FAM = b.pn and
a.Te013m1 = b.TX054_MC;
```

For sections H_H, Q_H, and R_H where the Financial Respondent completed the interview, instead of using TPN_FAM (Family Respondent) to perform the merge, data users will need to use TPN_FIN (Financial Respondent).

For the Section F files, data users will need merge the variables HHID, PN, and the variable(s) of interest from the F_R file with the variables HHID, PN and TFZ247 from the PR_SB file.

For the R level files data users can simply merge on HHID and PN.

Lastly, the Section file G_HP is less straightforward because respondents may indicate that their helper(s) are people not listed in the PR_MC file. In the G_R file, these “new” helpers will all be assigned an index value of 97 in the “who helps” variables (e.g., G032_1, G054_1, G066_1). As such, a user should perform a left merge when merging the data from the G_R file with the PR_MC file so that all helpers are included in the analysis. Researchers should use the HHID, PN, and variable(s) of interest from the G_R file in addition to the HHID, PN, and TX054_MC variables from the PR_MC file to perform the merges.

Appendix C: 2024 Production Data Model (DM) Changes

DM Version	Section	Field Name	Summary
4	D	D157, D158	Problem: Needed to update to Trump/Vance as president/vice president. Fix: Updated to Trump/Vance.
4	N	N530 – N528	Inserted the prescription drug Linkage experiment.
3	D	D432	Problem: The numbers displayed at D432 have been incorrect for web interviews since 2018. In web, an additional "7" was displayed, so: 3 . . . 3 . . . 4 . . . 6 . . . 6 . . . 7 . . . 7 . . . BLANK . . . BLANK was displayed instead of the intended: 3 . . . 3 . . . 4 . . . 6 . . . 6 . . . 7 . . . BLANK . . . BLANK. In non-web interviews, the display was correct. Fix: Corrected so one "7" is displayed instead of two.
3	M	M100	Added missing assignment to M100 so both M100 and M101 are assigned =1 before skipping for respondents with a permanent disability who never worked.
3	N, EOI	N130	Dropped the Rx consent series of questions in sections N and EOI
3	T	T017, T029	Added code 95. Siblings at both T017 and T029
3	V1	V101	Problem: The module changed to ask about respondent's exposure to any advertisements for prescription meds, no longer limited to ads seen on TV. Fix: Multiple changes to question text to be more inclusive, and a QxQ added for V105.

2	A	A036	Problem: The instructions were missing for Spanish, living proxies and exits. Fix: Added missing instructions.
2	A	A087	Problem: A city/state fill was appearing empty for non-spouse proxy Exit's at A087. This was due to another fix that caused a skip over a question that the fill was conditioned on. Fix: Added parenthesis so city/state is optional and not awkward when empty.
2	J	J994	We revised section flow so everyone is asked about gig work, except exits, then slightly revised the wording to accommodate for this broad criteria.
2	N	N305	Problem: The reordering of questions in the Hospitalization sequence in Section N was accidentally overwritten. Fix: Changes to reordering were brought back.
2	N	N451	Problem: Text fills were coming in empty at the Medicaid/Medicare consent question (N451) in situations where respondent 's were preloaded not to ask for either Medicaid or Medicare, and no consent, need to ask for the other Fix: Changed so we now skip the Medicaid/Medicare consent question (N451) if either Medicaid or Medicare are preloaded not to ask it (per Z113=9 or Z277=9).
2	Module 4	V410	Problem: Module authors wanted to change who is asked about difficulties with activities such as walking, bathing, or getting dressed over the next ten years so we ask when no ADL difficulties were reported at G016, G021, or G014 instead of at G016, G021, or G030. Fix: Changed to ask when no ADL difficulties were reported at G016, G021, or G014.
2	Module 4	V422	Problem: When respondent said they did not go without groceries over the past month because no one was there to help (V420 = 5 or 6), Respondents were skipping out of the rest of the module when they should have potentially been asked more questions about help with groceries. Fix: Changed so they first stopped at the V422 branchpoint.