

HEALTH AND RETIREMENT STUDY

2022 Tracker Weights File,

Version 1.0

October 2026

Data Description and Usage

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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, ([insert Product Name]) 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 hrspublications@umich.edu.

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

1. Introduction

The HRS Cross-Wave Tracker Weights File, or more simply, the Tracker Weights File, is a companion file to the HRS Cross-Wave Tracker File. Beginning with the 2022 HRS Tracker (Version 2.0) release, all weight variables previously included in the [Tracker File](#) have been moved to the Tracker Weights File. The Tracker Weights File contains household and respondent level sample weights for each wave of the survey, associated design variables, and subsample weights. The sample weights are constructed to make the HRS weighted sample representative of all U.S. households containing at least one person in the age-eligible range (for household weights) or of non-institutionalized individuals in the U.S. population in the age-eligible range (for respondent weights). **Researchers conducting analyses intended to produce estimates representative of the HRS target population must use the appropriate weight variables in the Tracker Weights File. Analyses that do not apply the appropriate weights may produce estimates that are not representative of the target population and could lead to incorrect conclusions.** This Data Description provides information about the available weights, their appropriate uses, and instructions for merging the weights with the analytic data.

Separating the weights from the Tracker File allows HRS to provide more timely updates to both the Tracker File and the Tracker Weights File whenever needed. Researchers can use the weights by merging the Tracker Weights File with the corresponding Tracker File using the HRS identifiers Household ID (HHID) and Person Number (PN). After merging, verify that the merge was completed correctly and that each analytic record has the appropriate weight, and then specify the selected weight in the statistical analysis ([refer to section 4D for examples](#)).

The 2022 HRS Tracker Weights File (Version 1.0) is a public release. It includes weights for previously released cases and weights for 2022 panel cases. At the time that this data was published, the 2022 EGENX weights were under development. Analysts planning to produce estimates representative of the HRS target populations using the Tracker Weights File Version 1 should therefore exclude EGenX respondents, who can be identified in the Tracker file by **STUDY = 71**. EGenX weights will be available in a future Tracker Weights File release.

Data users are strongly encouraged to identify the specific versions of the Tracker File and Tracker Weights File used in their analyses and to report both versions in any resulting publications.

To report any problems regarding the Tracker Weights file or this document, please contact us via email at hqsquestions@umich.edu.

2. The Structure of Tracker Weights File

2A. Variable Listing and Description

Table 1 lists all variables in the current version of the Tracker Weights File in the order they appear in both the data file and the codebook. The first two variables, household identifier (HHID) and person number (PN), together uniquely identifies each HRS panel member. These are followed by HHBASEWT, which contains the initial household design weights and nonresponse adjustment factors and is the base starting point for wave-specific weights; SECU and STRATUM, which are used for sampling error analysis, and WTCOHORT, which provides the entry-wave birth year assignment that can be used to create household level and respondent level weights. The remaining variables include weights for the Venous Blood Study (VBS), HRS wave-specific weights for the main survey and weights for ancillary surveys. The file also includes VERSION, which identifies the Tracker Weights File version number.

Table 1. Variables in the Tracker Weights File: Listing and Description

Variable	Type	Len	Label
HHID	Char	6	HOUSEHOLD IDENTIFIER
PN	Char	3	PERSON NUMBER
HHBASEWT	Num	8	HOUSEHOLD WEIGHT AT ENTRY
SECU	Num	8	SAMPLING ERROR COMPUTATION UNIT
STRATUM	Num	8	STRATUM ID
WTCOHORT	Num	8	BIRTH COHORT AT ENTRY
VBS1618WGTR	Num	8	2016-2018 WEIGHT: VENOUS BLOOD STUDY
PVBSWGTR	Num	8	2016 VBS SAMPLE WEIGHT
VBSI16WGTRA	Num	8	2016 VBS WEIGHT FOR ANALYSES INCLUDING DNA METHYLATION AND EPIGENETIC CLOCKS, TELOMERES, AND HOMOCYSTEINE

Variable	Type	Len	Label
VBSI16WGTRB	Num	8	2016 VBS WEIGHT FOR ANALYSES USING CLUSTERIN OR BRAIN-DERIVED NEUROTROPHIC FACTOR
XLBWGTR	Num	8	RESPONDENT WEIGHT FOR THE WAVE X LEAVE BEHIND QNAIRE
XPMWGTR	Num	8	RESPONDENT WEIGHT FOR THE WAVE X PHYSICAL MEASURES SUBSAMPLE
XWGTHH	Num	8	WAVE X WEIGHT: HOUSEHOLD LEVEL
XWGTR	Num	8	WAVE X WEIGHT: RESPONDENT LEVEL
XWGTRNH	Num	8	WAVE X WEIGHT: NURSING HOME RESIDENT
XWHY0HWT	Num	8	WAVE X WHY ZERO HOUSEHOLD LEVEL WEIGHT
XWHY0RWT	Num	8	WAVE X WHY ZERO RESPONDENT LEVEL WEIGHT
VERSION	Num	8	TRACKER WEIGHTS FILE VERSION NUMBER

2B. Naming Convention for the Wave-Specific Variables

The wave-specific variables for each HRS wave begin with a unique letter per wave. For example, the wave-specific variables for HRS 1992 all begin with the letter A and subsequent waves follow sequentially through the alphabet, with the exception of the letter I which was not used. The specific HRS waves and their indicator letter are shown in the table below. All wave-specific variables share the same naming structures across waves. For example, AWGTR through LWGTR are respondent level weight for HRS 1992 through HRS 2008 data waves, according to the table below, and the respondent level weight continues on in this way for each following wave thereafter. This feature has two advantages; first, it allows users to identify and link easily all the wave-specific variables, and second, it gives us the ability to name the variables specific to future HRS data waves in a predictable manner.

Table 2. HRS Data Waves and Wave Indicators

HRS Data Wave	Wave Indicator
HRS 1992	A
AHEAD 1993	B
HRS 1994	C
AHEAD 1995	D
HRS 1996	E

HRS Data Wave	Wave Indicator
HRS 1998	F
HRS 2000	G
HRS 2002	H
HRS 2004	J
HRS 2006	K
HRS 2008	L
HRS 2010	M
HRS 2012	N
HRS 2014	O
HRS 2016	P
HRS 2018	Q
HRS 2020	R
HRS 2022	S

3. Wave-Specific Variables

3A. HRS Sample Weights

3A1. xWGTHH, xWGTR, xWGTRNH, xWHYOWGT, xWHYOHWT, and xWHYORWT

xWGTHH is the sampling weight for analysis at the household level for community-dwelling households. xWGTR is the sampling weight for analysis at the respondent level for respondents living in the community. xWGTRNH is the sampling weight for analysis at the respondent level for respondents living in nursing homes. xWGTRNH has been constructed for each wave since 2000.

Since the HRS sample is a multi-stage area probability sample of the United States, with oversamples of Blacks and Hispanics, unbiased estimates of population parameters require the use of these sampling weights. Through 2002, the household level and respondent level weights (xWGTHH and xWGTR) are post-stratified to the March Current Population Survey (CPS) for the year of data collection. Starting in 2004, the much larger ACS is used in place of the CPS for post-stratification purposes. Although the HRS

samples only community dwellers at baseline, it follows respondents longitudinally into nursing homes and beginning in 2000 can represent that population reasonably well. The nursing home sampling weight (xWGTRNH) is designed to post-stratify nursing home residents interviewed in a given wave (2000 and subsequent waves) to represent the national population of nursing home residents by race, sex, and age in that year. Population totals by age and sex, and by race, are based on Census data in 2000 and 2010, with intercensal interpolations based on nursing home populations from the Minimum Data Set (MDS). Only nursing home residents who are age 55 or older and interviewed in the wave have a non-zero value for xWGTRNH.

The (community dwelling) respondent level weight xWGTR is zero when a respondent is not cohort eligible in wave x, is residing in a nursing home, or is deceased. There are also a very few cases with zero xWGTR because their birth cohort was not ascertained. The variable xWHY0WGT summarizes which of these conditions is responsible for a zero respondent level weight for cases with a core interview in wave x (available for waves 1992 through 2002). For the 2004 and later waves, xWHY0HWT explains why a household has a zero weight and xWHY0RWT explains why a respondent has a zero weight.

Prior to 2004, HRS weights are generated based on WTCOHORT, not BIRTHYR. WTCOHORT is constructed using a “first-mention” or “entry-wave” birth year measure. This information may not be completely consistent with BIRTHYR, which takes into account corrections by the HRS staff to the birth year measure constructed in WTCOHORT. Starting in 2004, BIRTHYR has been used to generate the weights. Conversely, after considerable investigation and discussion with the NIA Data Monitoring Committee, race and ethnicity is now based exclusively on a “first-mention” basis. Any post-baseline reports of race are not used.

In the 2012 release of the Tracker file, the 2004-2010 weights were updated to incorporate several changes. First, the post-stratification method used to generate the household and respondent-level weights for the 2004 and later waves was modified to use ACS rather than CPS. Second, the updated weights are based on the first mention of race and ethnicity, reversing some changes that were made to the race and ethnicity variables in some previous versions of Tracker. Finally, non-original sample members who are no longer coupled with an original sample member are now assigned non-zero

weights, so long as they are cohort eligible. As a result of these updates, the core household and respondent-level weights for the 2004-2010 waves will differ slightly from those in earlier releases of the Tracker file.

For 2016 we provide the same three types of weight variables. However, the methods of construction differ from prior years in two key groups. The newly recruited Late Baby Boom (LBB) cohort had its initial sampling weights created with additional control variables in the non-response adjustment and in the final post-stratification. Secondly, nursing home residence was changed from self-report to be more consistent with the Census definition used in the ACS totals used for post-stratification.

A careful review has determined that a significant fraction of HRS respondents who report at question A028 living in nursing homes or other facilities, live in facilities such as assisted living facilities, that are not classified by the Census as nursing home institutional group quarters. Multiple data sources were used to make individual reassignments of residence type that are included in the 2020 Tracker file release and subsequent releases.

Starting in 2016, HRS post-stratifies community-dwelling respondents using the ACS 1-year Public Use Micro Sample (PUMS) data from the year corresponding to the survey year (e.g., ACS 2016 1-year data for HRS 2016). Because ACS PUMS does not include nursing home as a separate category, the nursing home resident post-stratification uses the ACS 5-year Summary File (SF) and intercensal estimates of nursing home residents.

Consistent with past years, households where all members were in nursing homes are assigned zero values for the household weight (xWGTHH).

HRS post-stratification is done at the household level as well as the respondent level. At the household level, population totals of household cohort, race/ethnicity of household members, coupleness status, household type and counts of financial units are used. In 2016, household post-stratification additionally controls for region, education of household members and labor force status of household members for the LBB cohort households. Respondent level post-stratification differs by dwelling type. Community respondents are post-stratified to population totals of cohort, marital status, sex and race/ethnicity. Specifically for LBB respondents in newly recruited LBB households,

population totals of region, education and labor force status are additionally used. Post-stratification for nursing home respondents controls for age, sex and race.

3A2. Sample Weights for 2004 Physical Measure and Leave-Behind Questionnaire (JPMSELWT, JPMWGTR, JWGTR_PS AND JWGTR_DB)

Sample weights were developed for the 2004 Physical Measures and Leave-Behind components to account for differential probabilities of selection into the subsample and non-response to the specific component. These variables include:

- Physical Measures
 - PHYMSR04– sample selection indicator for 2004 physical measures (variable located in Tracker)
 - JPMSELWT – selection weight for the 2004 physical measures subsample
 - JPMWGTR – final respondent weight for 2004 physical measures subsample
- Psychosocial Leave-Behind
 - JWGTR_PS – final respondent weight for 2004 psychosocial subsample
- Disability Leave-Behind
 - JWGTR_DB – final respondent weight for 2004 disability subsample

A general description of the physical measures and leave-behind components can be found in the [2004 Core Data Description](#). Questionnaires for each are available on the HRS website:

- [Physical Measures](#)
- [Psychosocial Leave-Behind](#)
- [Disability Leave-Behind](#)

More detailed information on the selection indicators and sample weights is provided in the following documents:

- [Sample Weights and Sample Selection Indicator for the Physical Measures in HRS 2004](#)
- [Sample Weights, Sample Selection Indicators and Response Rates for the Psychosocial and Disability Leave-Behind Questionnaires in HRS 2004](#)

3A3. Sample Weights for the 2006 and Subsequent Wave Physical Measures, Biomarkers, and Psychosocial Leave Behind Questionnaire

Sample weights were developed for the physical measure and biomarker components separately. Respondents who completed at least one physical measure were assigned a physical measures weight and respondents with at least one valid biomarker result were assigned a biomarker weight. The weights were adjusted for the differential probabilities of participation by dividing the HRS 2006 sample weight by the predicted probability of response to each component. The resulting interim weight was trimmed at the 5th and 95th percentiles and was then post stratified back to the entire 2006 HRS sample by age, sex, and race/ethnicity. The sample weights for each component are provided in the Tracker Weights file. These include:

- EFTFASSIGN – enhanced face-to-face sample indicator (variable located in Tracker)
- KPMWGTR – final respondent weight for 2006 physical measures subsample
- KBIOWGTR - final respondent weight for 2006 biomarker subsample

More information on the physical measures component including details on sampling, consent, administration, and rationale is provided in the following [User Guide](#).

Information on the biomarker collection can be found in the [Data Description for the 2006 Biomarker Data file](#).

Separate respondent level survey weights were constructed to adjust for non-response to the Leave Behind component. The HRS 2006 sample weight was adjusted for non-response by dividing it by the predicted probability of response to the questionnaire. Age, sex, race/ethnicity, marital status, health status, depressive symptoms, low cognition, IADL/ADL difficulties, mobility, poor vision, work status, and religious attendance were used in the non-response model. The resulting interim weight was trimmed at the 5th and 95th percentiles and was then post stratified back to the entire 2006 HRS sample by age, sex, and race/ethnicity. The sample weights, sample selection and eligibility indicators for the psychosocial component include the following variables:

- EFTFASSIGN – enhanced face-to-face sample indicator (variable located in Tracker)
- KLBWGTR – final respondent weight for the 2006 leave behind questionnaire subsample

More information about the questionnaire can be found in the [User Guide](#).

Sample weights for subsequent Physical Measures, Biomarker, and Psychosocial Leave-Behind Questionnaire waves were developed using the same methodology as in 2006. The sample weights for each component are provided in the Tracker Weights file. These include:

2008

- LPMWGTR – final respondent weight for the 2008 physical measures subsample
- LBIOWGTR – final respondent weight for the 2008 biomarker subsample
- LLBWGTR – final respondent weight for the 2008 leave behind questionnaire subsample

2010

- MPMWGTR – final respondent weight for the 2010 physical measures subsample
- MBIOWGTR – final respondent weight for the 2010 biomarker subsample
- MLBWGTR – final respondent weight for the 2010 leave behind questionnaire subsample

2012

- NPMWGTR – final respondent weight for the 2012 physical measures subsample
- NBIOWGTR – final respondent weight for the 2012 biomarker subsample
- NLBWGTR – final respondent weight for the 2012 leave behind questionnaire subsample

2014

- OPMWGTR – final respondent weight for the 2014 physical measures subsample
- OBIOWGTR – final respondent weight for the 2014 biomarker subsample
- OLBWGTR – final respondent weight for the 2014 leave behind questionnaire subsample

2016

- PPMWGTR – final respondent weight for the 2016 physical measures subsample
- PBIOWGTR – final respondent weight for the 2016 biomarker subsample
- PLBWGTR – final respondent weight for the 2016 leave behind questionnaire subsample

2018

- QPMWGTR – final respondent weight for the 2018 physical measures subsample
- QBIOWGTR – final respondent weight for the 2018 biomarker subsample
- QLBWGTR – final respondent weight for the 2018 leave behind questionnaire subsample

2020

- RLBWGTR – final respondent weight for the 2020 leave behind questionnaire subsample

2022

- SLBWGTR – respondent weight for the 2022 leave behind questionnaire subsample
- SPMWGTR – respondent weight for the 2022 physical measure subsample

3A4. Sample Weights for the 2016 Venous Blood Study – Full sample (PVBSWGTR) and Innovative Sub Sample (VBSI16WGTRA and VBSI16WGTRB)

Respondents with at least one valid venous blood result (VBS16VALID) were assigned a VBS weight. The weights were adjusted for the differential probabilities of participation by dividing the HRS 2016 sample weight by the predicted probability of having a valid venous blood result among community-dwelling 2016 HRS respondents born prior to 1960, excluding all members of the LBB cohort. The resulting interim weight was trimmed at the 1st and 99th percentiles and was then post stratified back to the entire 2016 HRS sample born prior to 1960 by age, sex, and race/ethnicity. Two separate respondent-level weights were created for the VBS 2016 Innovative Sub Sample and should be used for analyses of data from that sample. VBSI16WGTRA should be used for analyses including DNA methylation and epigenetic clocks, telomeres, and homocysteine. VBSI16WGTRB should be used for analyses using clusterin or brain-derived neurotrophic factor.

More information on the 2016 Venous Blood Study, including details on sampling, consent, and administration, is provided in the VBS 2016 Data Description.

Note: PVBSWGTR replaces the preliminary VBS weight (vbswt2) that was released with the Venous Blood Study 2016 Early V1.0 data (Dec 2017).

3A5. VBS 2016 and 2018 Combined Respondent Weight (VBS1618WGTR)

The 2018 VBS data include respondents who were new sample members in 2016 (the LBB cohort), new spouse/partners in 2018, or who did not provide a blood sample in 2016 but were asked and provided a sample in 2018. As a result, the 2018 data cannot be used alone to represent the HRS sample. We recommend combining the 2016 and 2018 VBS samples for analyses of the entire HRS range of age-eligible respondents (51+ years). To facilitate this, we have created a combined weight for analysis. Age-eligible respondents with at least one valid venous blood result in 2016 or 2018 (VBS16VALID and VBS18VALID) were assigned a VBS weight. The 2016 and 2018 core weights were used as a starting point. The core weights were adjusted for the differential probabilities of participation by dividing the core HRS sample weight by the predicted probability of having a valid venous blood result among community-dwelling HRS 2016 and 2018 respondents. The resulting interim weight was trimmed at the 1st and 99th percentiles and was then post stratified back to the entire 2016 HRS sample born prior to 1966 by age, sex, and race/ethnicity. Analysts should use VBS1618WGTR to weight the data when using VBS 2016 together with VBS2018 data.

4. Obtaining the Data

4A. Registration and Downloading the Data

HRS data are available for free to researchers and analysts at the HRS website. In order to obtain public release data, you must first register at our [website](#). 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.

4B. Conditions of Use

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

4C. 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

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

4D. Merging Tracker and Tracker Weights File

Researchers conducting analyses intended to produce estimates representative of the HRS target population will need to use the weights. It will be important for analysts to merge the Tracker and the Tracker Weights File before they begin their analyses. Both data files are respondent-level files and can be merged easily using the household identification variable, HHID, and the person identification variable or person number, PN, which are available in both files.

It is important to understand that sometimes the Tracker File may contain more cases (respondents) than the Tracker Weights File. This is common, for example, when new cohorts are enrolled and their data are added to the Tracker File before their corresponding weights have been developed. When the weight variables for the new cohort are finalized and added to the Tracker Weights File, then the case counts for both files are the same or very close.

Note that analysts planning to use the weights should only include respondents in the merged file who have a record in both the Tracker File and the Tracker Weights File.

The SAS, STATA, and SPSS code to merge the Tracker and Tracker Weights files is provided below.

Examples: Merging the Tracker with the Tracker Weights File:

SAS

```
libname trk 'file path where the datasets are located on your computer';

/*Sort each file by HHID and PN*/
proc sort data=trk.trk2022tr_r out=work.trk;
  by HHID PN;
proc sort data=trk.wgts2022tr_r out=work.trkwgt;
  by HHID PN;

/*Merge the two files to create a merged file called trkwgtmerged_r */
data trk.trkwgtmerged_r;
  merge work.trk (in=a) work.trkwgt (in=b);
  by HHID PN;
run;
```

STATA

```
#delimit;

local Tracker "file path where the Tracker file data is located on your computer";
local Trackwgt "file path where the Tracker Weights file is located on your
computer";
local WorkDir "file path where you will store the log file and merged data";

log using "`WorkDir'\Trkwgtmerged.log", replace;

use "`Tracker'\TRK2022TR_R.dta", clear;
merge 1:1 HHID PN using "`Trackwgt'\WGTS2022TR_R.dta";

log close _all;
```

SPSS

```
GET FILE = 'file path where the Tracker file data is located on your computer'.

*Optimize size of string variables.
ALTER TYPE ALL(A=AMIN) .

*Sort cases by HHID and PN.
SORT CASES BY HHID PN.
```

*Name the new dataset trk.

DATASET NAME trk.

EXECUTE.

GET FILE = 'file path where the Tracker Weights file data is located on your computer'.

*Optimize size of string variables.

ALTER TYPE ALL(A=AMIN).

*Sort cases by HHID and PN.

SORT CASES BY HHID PN.

*Name the new dataset trkwgt.

DATASET NAME trkwgt.

EXECUTE.

*Merge the two files matching cases by HHID and PN and name the resulting file trkwgtmerged.

MATCH FILES

 /FILE='trk'

 /TABLE='trkwgt'

 /BY HHID PN.

DATASET NAME trkwgtmerged.

EXECUTE.

E.

5. If You Need to Know More

This document is intended to serve as a brief overview and to provide guidelines for using the Tracker Weights data. If you have questions or concerns that are not adequately covered here or on our [website](#), or if you have any comments, please contact us. We will do our best to provide answers.

5A. 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, please visit the HRS [website](#).

5B. Contact Information

Internet: Help Desk at our website

E-mail: hqsquestions@umich.edu

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