

*Harmonization of Cross-National Studies of
Aging to the Health and Retirement Study –
User Guide: Family Transfer – Informal Care*

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**HARMONIZATION OF CROSS-NATIONAL STUDIES OF AGING TO THE HEALTH AND
RETIREMENT STUDY**

USER GUIDE

Family Transfer - Informal Care

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Table of Contents

LIST OF TABLES & FIGURES	5
INTRODUCTION	6
EXECUTIVE SUMMARY AND OVERVIEW	8
1. INVENTORY OF MEASURES	11
1.1 United States – Health and Retirement Study (HRS)	11
1.1.1 Help Received by Respondent: ADL	11
1.1.2 Help Received by Respondent: IADL	11
1.1.3 Help Received by Respondent: Other	11
1.1.4 Help Provided by Respondent: to Household members	11
1.1.5 Help Provided by Respondent: to Grandchildren.....	11
1.1.6 Help Provided by Respondent: to non-Household people.....	12
1.2 England- English Longitudinal Study of Ageing (ELSA)	12
1.2.1 Help Received by Respondent: ADL	12
1.2.2 Help Received by Respondent: IADL	12
1.2.3 Help Received by Respondent: Other	12
1.2.4 Help Provided by Respondent: to Household members	12
1.2.5 Help Provided by Respondent: to Grandchildren.....	13
1.2.6 Help Provided by Respondent: to non-Household people.....	13
1.3 Europe- Survey of Health, Ageing and Retirement in Europe (SHARE)	13
1.3.1 Help Received by Respondent: ADL	13
1.3.2 Help Received by Respondent: IADL	13
1.3.3 Help Received by Respondent: Other	13
1.3.4 Help Provided by Respondent: to Household members	14
1.3.5 Help Provided by Respondent: to Grandchildren.....	14
1.3.6 Help Provided by Respondent: to non-Household people.....	14
1.4 South Korea- Korean Longitudinal Study of Aging (KLoSA)	14
1.4.1 Help Received by Respondent: ADL	14
1.4.2 Help Received by Respondent: IADL	15
1.4.3 Help Received by Respondent: Other	15
1.4.4 Help Provided by Respondent: to Household members	15
1.4.5 Help Provided by Respondent: to Grandchildren.....	15
1.4.6 Help Provided by Respondent: to non-Household people.....	15
1.5 India- Longitudinal Aging Study in India (LASI)	15
1.5.1 Help Received by Respondent: ADL	16
1.5.2 Help Received by Respondent: IADL	16
1.5.3 Help Received by Respondent: Other	16
1.5.4 Help Provided by Respondent: to Household members	16
1.5.5 Help Provided by Respondent: to Grandchildren.....	16
1.5.6 Help Provided by Respondent: to non-Household people.....	16
1.6 China- Chinese Health and Retirement Longitudinal Study (CHARLS)	16

1.6.1	Help Received by Respondent: ADL	16
1.6.2	Help Received by Respondent: IADL	17
1.6.3	Help Received by Respondent: Other	17
1.6.4	Help Provided by Respondent: to Household members	17
1.6.5	Help Provided by Respondent: to Grandchildren.....	17
1.6.6	Help Provided by Respondent: to non-Household people.....	17
1.7	Japan- Japanese Study on Aging and Retirement (JSTAR)	17
1.7.1	Help Received by Respondent: ADL	17
1.7.2	Help Received by Respondent: IADL	18
1.7.3	Help Received by Respondent: Other	18
1.7.4	Help Provided by Respondent: to Household members	18
1.7.5	Help Provided by Respondent: to Grandchildren.....	19
1.7.6	Help Provided by Respondent: to non-Household people.....	19
1.8	Ireland- The Irish Longitudinal Study on Aging (TILDA)	19
1.8.1	Help Received by Respondent: ADL	19
1.8.2	Help Received by Respondent: IADL	19
1.8.3	Help Received by Respondent: Other	19
1.8.4	Help Provided by Respondent: to Household members	20
1.8.5	Help Provided by Respondent: to Grandchildren.....	20
1.8.6	Help Provided by Respondent: to non-Household people.....	20
1.9	Mexico- Mexican Health and Aging Study (MHAS)	20
1.9.1	Help Received by Respondent: ADL	20
1.9.2	Help Received by Respondent: IADL	21
1.9.3	Help Received by Respondent: Other	21
1.9.4	Help Provided by Respondent: to Household members	21
1.9.5	Help Provided by Respondent: to Grandchildren.....	21
1.9.6	Help Provided by Respondent: to non-Household people.....	21
1.10	Indonesia- Indonesia Family Life Survey (IFLS)	21
1.10.1	Help Received by Respondent: ADL	22
1.10.2	Help Received by Respondent: IADL	22
1.10.3	Help Received by Respondent: Other	22
1.10.4	Help Provided by Respondent: to Household members.....	22
1.10.5	Help Provided by Respondent: to Grandchildren	23
1.10.6	Help Provided by Respondent: to non-Household people	23
2.	METHODOLOGICAL ISSUES	24
2.1	Help Received by Respondent: ADL	24
2.2	Help Received by Respondent: IADL	27
2.3	Help Received by Respondent: Other.....	29
2.4	Help Received- Quantity.....	31
2.5	Help Received- Differences in Helper Characteristics.....	33
2.6	Help Provided by Respondent: to Household members.....	37
2.7	Help Provided by Respondent: to Grandchildren.....	40
2.8	Help Provided by Respondent: to non-Household/non-coresident persons.....	42
3.	USING MEASURES IN CROSS-COUNTRY ANALYSIS	45
3.1	Help Received by Respondent: ADL	45
3.2	Help Received by Respondent: IADL	46
3.3	Help Received by Respondent: Other.....	46

3.4 Help Provided by Respondent: to Household members	46
3.5 Help Provided by Respondent: to Grandchildren.....	47
3.6 Help Provided by Respondent: to non-Household persons	47
4. QUESTION CONCORDANCE	48
4.1 Variables: ADL help Received	48
4.2 Variables: IADL help Received	50
4.3 Variables: Other Help received	51
4.4 Variables for Help Received- Quantity	52
4.5 Variables: Help Provided by Respondent to Household members.....	53
4.6 Variables: Help Provided by Respondent to Grandchildren.....	54
4.7 Variables: Help Provided by Respondent to non-Household persons	55
4.8 Question Index by Survey.....	56
4.8.1 HRS	56
4.8.2 ELSA.....	68
4.8.3 SHARE.....	77
4.8.4 KLoSA.....	82
4.8.5 LASI.....	88
4.8.6 CHARLS.....	91
4.8.7 JSTAR	95
4.8.8 TILDA	103
4.8.9 MHAS.....	113
4.8.10 IFLS	122

LIST OF TABLES & FIGURES

Table 2.1: ADL Help Received Measures	26
Table 2.2: IADL Help Received Measures	28
Table 2.3: Other Help Received Measures	30
Table 2.4: Quantity/Frequency of Help received.....	32
Table 2.5: Helper Differences	34
Table 2.5 (continued): Helper Differences.....	36
Table 2.6.1: Help provided to which Household Member.....	37
Table 2.6.1 (continued): Help provided to which Household Member.....	38
Table 2.6.3b: Frequency of Help provided to Household Member	40
Table 2.6.3a: Quantity of Help Provided to Household Member	40
Table 2.7: Help provided to Grandchildren	41
Table 2.8.1: Help whom outside the Household	42
Table 2.8.3: Quantity of Help Provided by Respondent to non-Household persons	44
<i>Figure 1: Constructing cross-country measure of amount of help received.</i>	<i>46</i>
Table 4.1: ADL Help Question Reference.....	48
Table 4.2: IADL Help Question Reference.....	50
Table 4.3 : Other Help Question Reference	51
Table 4.4: Quantity/Frequency of Help received Question Reference.....	52
Table 4.5: Help provided to Household Members Question Reference	53
Table 4.6: Help provided to Grandchildren Question Reference	54
Table 4.7: Help provided to non-Household Question Reference	55
Appendix: Intra-survey changes, across waves	129

INTRODUCTION

The Health and Retirement Study (HRS) has achieved remarkable scientific success, as demonstrated by an impressive number of users and research studies and publications, utilizing the HRS. Its success has generated substantial interest in collecting similar data as population aging have experienced and is progressing in every region of the world.

The result has been a number of surveys designed to be comparable with the HRS: the English Longitudinal Study of Ageing (ELSA), the Survey of Health, Ageing, and Retirement in Europe (SHARE), the Korean Longitudinal Study of Aging (KLoSA), the Longitudinal Aging Study in India (LASI), the China Health and Retirement Longitudinal Study (CHARLS), the Japanese Study on Aging and Retirement (JSTAR), The Irish Longitudinal Study on Ageing (TILDA), the Indonesia Family Life Survey (IFLS), and the Mexican Health and Ageing Study (MHAS). The overview of this family of surveys, including their research designs, samples, and key domains can be found in Lee (2010).¹

As these surveys were designed with harmonization as a goal, they provide remarkable opportunities for cross-country studies. The value of comparative analyses, especially the opportunities they offer for learning lessons resulting from policies adopted elsewhere, is widely recognized. Yet there are only a limited number of empirical studies exploiting such opportunities. This is partly due to the difficulty associated with learning multiple surveys and the policies and institutions of each country.

Identifying comparable questions across surveys is the first step toward cross-country analyses. The Gateway to Global Aging Data web site (g2aging.org) provides users a digital library of questions for all these surveys. Its search engines enable users to examine cross-country concordance for each survey question. Using them, researchers can identify all questions related to particular key words or within a domain.

Nevertheless, comparing these questions and evaluating comparability across surveys is a labor-intensive process. Understanding all the idiosyncratic details in each survey takes still more effort. To facilitate such a process, we have prepared a series of domain-specific user guides. These user guides are designed to provide researchers with documentation about the concepts, measures and questions of particular domains in the all HRS-family surveys. For each

¹ For an overview of these studies, see Lee, J. (2010). Data set for pension and health: Data collection and sharing for policy design, *International Social Security Review*, 63, (3-4), 197 - 222.

domain, we reviewed all relevant questions across all surveys. These guides expand upon the information found in codebooks, questionnaires and data descriptions. They also provide our evaluation of the comparability across surveys and recommendations for harmonized measures that can be exploited for cross-country analyses. We hope these guides, by helping researchers save time and better understanding what can be studied in HRS-family surveys, accelerate scientific advances.

EXECUTIVE SUMMARY AND OVERVIEW

This guide reviews and summarizes questions on informal/non-institutional care/help from the Health and Retirement Study (HRS) and its sister surveys. These include: the 2010 wave of the HRS, five waves (2002-03, 2004-05, 2006-07, 2008-09 & 2010-11) of the English Longitudinal Study of Ageing (ELSA), Waves 1, 2, and 4² (2004-05, 2006-07 & 2010-11) of the Survey of Health, Ageing, and Retirement in Europe (SHARE), first three waves (2006-07, 2008-09, 2010-11) of the Korean Longitudinal Study of Aging (KLoSA), first three waves (2006-07, 2008-09, 2010-11) of the Japanese Study on Aging and Retirement (JSTAR), first wave (2010-11) of the China Health and Retirement Longitudinal Study (CHARLS), first wave (2010-11) of the Irish Longitudinal Study on Ageing (TILDA), first two waves (2000-01 & 2002-03) of the Mexican Health and Ageing Study (MHAS), fourth wave (2007-08) of Indonesian Family Life Survey (IFLS) and the pilot wave (2010) of the Longitudinal Ageing Study in India (LASI). All of the surveys collected information on informal care received and provided, but varied in the spectrum and details of questions asked.

We categorize informal care received by respondents by types of activities: 1) activities of daily living (ADLs), 2) instrumental activities of daily living (IADLs), and 3) other activities not in the purview of either ADL or IADL. For each of these categories we identify, wherever possible, relationship of the helper to the respondent, for what specific activity help was received, and extent of help in time units.

We then discuss help provided by the respondent, categorizing variables by who is helped: 1) household members, 2) grandchildren, or 3) non-household members. This categorization has been done as such since taking care of grandchildren is of particular interest for many researchers; helping non-household members could potentially involve more effort since the respondent might be going out. For each of these categories we again identify, wherever possible, for what specific activity help was given, and time spent on providing such care.

² Wave 3 is life history survey

A number of similarities and differences emerge across surveys.

- The module in which care received-by-respondent questions appear is similar (with some variations in the list of ADL and IADL difficulties) across surveys for ADL and IADL help- typically the Health/Functioning module (except SHARE which places these questions in Social Support module), where these questions are prompted only when the respondent reports any difficulty.
- All surveys ask about help received for ADL difficulties.
- All surveys, except LASI³, ask whether the respondent receives any IADL help.
- All surveys, except IFLS, ask about help given by Respondent to co-residing family members. Help provided to parents can be identified in HRS, ELSA, SHARE (if co-residing), KLoSA, CHARLS, JSTAR & MHAS.
- Care provided to grandchildren is asked about in all aging surveys except JSTAR; IFLS is not an aging study, hence does not ask about grandchildren.
- Help given by Respondent to non-household persons is asked about in HRS, ELSA (Wave 1) SHARE, KLoSA, CHARLS, TILDA & IFLS.

There are variations in:

- Whether help received questions for each of the ADL and IADL are asked separately or combined. ADL and IADL help is separable in HRS, JSTAR, TILDA & MHAS; ELSA, SHARE, KLoSA, CHARLS & IFLS combine the two. Help received for *each* of the ADLs or IADLs is separable in HRS, JSTAR (*not* the IADL's), TILDA & MHAS; in ELSA to a lesser extent since it combines related ADLs and IADLs, for example- help received for dressing is asked about jointly with help received for bathing, help received for eating with help received for preparing a hot meal.
- The maximum number of helpers for whom detailed information like relationship and extent of help can be captured. For example, on one end of the spectrum are IFLS which identifies only one ADL/IADL helper and SHARE which identifies one household helper and one non-household helper; then are CHARLS, TILDA & KLoSA which restrict the

³ LASI baseline, scheduled for 2016, will ask about help for those who have any ADL or IADL difficulties.

number of helpers who are asked about to three, four & five respectively; and finally HRS, JSTAR, ELSA & MHAS which place no such constraints.

- Some surveys list paid helper or nurse or employee as options in questions identifying the helper, while other surveys ask a separate question regarding paid help.
- Non-ADL help can be broadly categorized in three sub-groups: household chores, such as help with work around the house or yard (asked about in HRS, ELA, MHAS, IFLS & SHARE), paperwork (SHARE, JSTAR & TILDA), and other help with mobility (ELSA & SHARE).
- There are differences in how extent of help given or received is measured- some surveys ask frequency while some ask specific numbers of hours or days, with varying recall like past month or past year.

In attempts at harmonizing these variables, we provide some suggestions:

- Cross country comparison of help, especially binary indicator of whether help received or given is feasible across all surveys. Noting differences in type of help, such as help for ADL versus help for IADL, a smaller set of surveys, including HRS, LASI, JSTAR, TILDA, and MHAS allow such comparisons of ADL help.
- In creating harmonized values for extent of help received or provided, it is important to take into account the unit of time asked- hours or days, as well as the recall period, and accordingly scale up or down.
- Given limits on the maximum numbers of helpers that are asked about in some surveys- a good start point for studying helper is comparing the helper who helps most.
- Help provided to Parents &/ Parents-in-law, and care taken of Grandchildren emerge as the most comparable measures of help provided by the Respondent.

1. INVENTORY OF MEASURES

1.1 United States – Health and Retirement Study (HRS)

1.1.1 Help Received by Respondent: ADL

In the Functional Limitations and Helpers module, Respondents are asked about whether or not they receive help for each ADL they report having a difficulty with in the preceding questions, relationship to Respondent is asked for up to seven helpers. Quantity of help in days during last month and hours per day is asked for each helper.

1.1.2 Help Received by Respondent: IADL

In the Functional Limitations and Helpers module, Respondents are asked about whether or not they receive help for each IADL they report having a difficulty with in the preceding questions, relationship to Respondent is asked for up to six helpers. Quantity of help in days during last month and hours per day is asked for each helper.

1.1.3 Help Received by Respondent: Other

In the Functional Limitations and Helpers module, help received with work around the house or yard because of a health problem is asked about.

1.1.4 Help Provided by Respondent: to Household members

These variables are in the Parents, Siblings and Transfers module. Respondent is asked about help provided to parents (and/or their partners), number of hours spent on this activity- unfolding brackets are also used. Respondent's spouse is also asked these questions.

1.1.5 Help Provided by Respondent: to Grandchildren

These variables are in the Family Structure module. Respondent is asked about care provided to grand or great grandchildren, who are the parents of these grandchildren, number of hours spent on this activity- unfolding brackets are also used. Respondent's spouse is also asked these questions.

1.1.6 Help Provided by Respondent: to non-Household people

In the Functional Limitations and Helpers module, Respondent is asked about help provided to friends, neighbors, or relatives who did not co-reside and did not pay for the help, quantity of such help is asked in brackets of ($\geq < 100$, $\geq < 200$, $\geq < 50$) hours last year.

1.2 England- English Longitudinal Study of Ageing (ELSA)

1.2.1 Help Received by Respondent: ADL

In the Health module of the ELSA questionnaire, after reporting any ADL/IADL difficulties in the preceding questions, Respondent is asked if he/she gets any help for the activities he/she has problems with. It then goes on to ask about specifically who helped the respondent for each of the ADL/IADL difficulty reported.

1.2.2 Help Received by Respondent: IADL

Same as help received for ADL's.

1.2.3 Help Received by Respondent: Other

In the Health module, Respondent is asked about who helps him/her with climbing stairs, help with work around the house or yard and help with further mobility problems (like walking 100 yards, sitting, getting up from a chair, stooping, reaching, pulling, lifting, picking up a coin, reading a map, speaking or recognizing danger).

1.2.4 Help Provided by Respondent: to Household members

In the Effort and Reward module (except for Wave 1 where they are placed in the Social Participation module), Respondent is asked whether he/she 'looked after' (explained as active provision of care) any household member, and if yes, then how is that person related to the Respondent.

It is the only survey to ask about satisfaction with providing help (not in Wave 1).

1.2.5 Help Provided by Respondent: to Grandchildren

While helping/ (caring for) grandchildren is not asked about separately, it can be captured using questions in the Effort and Reward module regarding help to household members in the since they list grandchild as one of the options.

1.2.6 Help Provided by Respondent: to non-Household people

ELSA, wave 4, has separate questions in the Effort and Reward module asking about whether Respondent provided various types of unpaid help to a friend or a neighbor who is not a relative. These are not available for waves 1, 2 & 3.

1.3 Europe- Survey of Health, Ageing and Retirement in Europe (SHARE)

1.3.1 Help Received by Respondent: ADL

SHARE waves 1 & 2, in the Physical Health module, ask Respondent whether anyone helps out him/her if he/she reports any difficulties with ADLs, IADL's, mobility, large muscle, gross and fine motor activities in the preceding questions. While the difficulties are asked about in Wave 4 as well, the subsequent help question is not asked.

In the Social Support module, the Respondent is again asked about specifically which household members helps him/her with personal care (such as washing, getting out of bed, or dressing), and who from outside the household helped with personal care or practical household help (e.g. with home repairs, gardening, transportation, shopping, household chores).

1.3.2 Help Received by Respondent: IADL

Same as help received for ADL's.

1.3.3 Help Received by Respondent: Other

Waves 1 & 2, Physical Health module, ask about any help received (combined with ADL and IADL help) if Respondent reports difficulties with walking 100 meters, sitting for about two hours, getting up from a chair after sitting for long periods, climbing stairs without resting, stooping, kneeling, or crouching, reaching or extending arms above shoulder level, pulling or pushing large objects like a living room chair, lifting or carrying

weights over 10 pounds/5 kilos, picking up a small coin from a table. Wave 4 does not ask about this combined help.

Social Support module helps identify who from outside the household provided Respondent with practical household help or help with paperwork (such as filling out forms, settling financial or legal matters).

1.3.4 Help Provided by Respondent: to Household members

Social Support module helps identify household member(s) whom the Respondent provided personal care (such as washing, getting out of bed, or dressing).

1.3.5 Help Provided by Respondent: to Grandchildren

These are asked about in a separate set of questions in the Social Support module, providing information on who are the parents of the grandchild(ren) the Respondent takes care of, how often, and how many hours (on a typical day/in a typical week/in a typical month/in the last twelve months).

1.3.6 Help Provided by Respondent: to non-Household people

Social Support module identifies how the Respondent is related to the non-household person he/she provided personal care, practical household help, or help with paperwork. The three types of help given, aforementioned, can be separated in waves 1 & 2, but not in wave 4.

1.4 South Korea- Korean Longitudinal Study of Aging (KLoSA)

1.4.1 Help Received by Respondent: ADL

KLoSA waves 2 and 3, Functional Limitations and Helpers module, allow information for a maximum of five ADL & IADL helpers; wave 1 allows information for a maximum of 3 helpers. These are asked if the Respondent reports difficulty with any ADL or IADL. It also asks about who the respondent can *expect* to get ADL help from, in the future if need for the same arises.

1.4.2 Help Received by Respondent: IADL

Same as help received for ADL's.

1.4.3 Help Received by Respondent: Other

N.A.

1.4.4 Help Provided by Respondent: to Household members

Family and Family Transfer module identifies family members of the house with ADL difficulties (over the age of 10), then asks the Respondent if he/she cared for each of them. For each member taken care of by the Respondent, it asks for hours per week and weeks in last year help was given.

1.4.5 Help Provided by Respondent: to Grandchildren

These variables are in the Family and Family Transfer module. Waves 2 and 3 separately ask care given to grandchildren before they reached the age of 10- data for a maximum of ten grandchildren allowed, even if that grandchild is now over 10; and if they took care of any grandchildren below age 10 during last year- data for a maximum of five grandchildren allowed. Wave 1 only asks for care taken of grandchildren younger than 10 during last year.

For the grandchild(ren) who the Respondent takes/took care of- their parents are asked about; and how many years and hours per week of care was provided.

1.4.6 Help Provided by Respondent: to non-Household people

Family and Family Transfer module asks the Respondent to specify his/her relationship to each family member not living in the same household (over the age of 10) who he/she helped with ADLs or IADL's. For each person taken care of by the Respondent, it asks for hours per week and weeks in last year help was given.

1.5 India- Longitudinal Aging Study in India (LASI)

1.5.1 Help Received by Respondent: ADL

In the Health module, if the Respondent reports any ADL difficulty in the preceding questions, he/she is asked about number of ADL helpers but allows identification of only the one that helps most. Days in the last month and hours per day of help received is asked about only for this one helper.

1.5.2 Help Received by Respondent: IADL

LASI does not ask about IADL difficulties, and hence does not have information on IADL helpers specifically.

1.5.3 Help Received by Respondent: Other

N.A.

1.5.4 Help Provided by Respondent: to Household members

Family and Social Network module first asks the Respondent if any member of his/her family is unable to carry out basic daily activities; if yes, does the Respondent take care of them, how often and how many hours per week/day/month.

1.5.5 Help Provided by Respondent: to Grandchildren

Family and Social Network module asks the Respondent whether he/she looks after any grandchildren and if yes, how many hours per week on an average does he/she spend on this activity.

1.5.6 Help Provided by Respondent: to non-Household people

N.A.

1.6 China- Chinese Health and Retirement Longitudinal Study (CHARLS)

1.6.1 Help Received by Respondent: ADL

In the Health Status and Functioning module, the Respondent is asked about a maximum of three ADL/IADL helpers if he/she reports having difficulties in the preceding questions- what is the helper's relationship to Respondent, how many days in

last month and how many hours per day was help received from each helper, does the helper co-reside, and if he/she is paid.

1.6.2 Help Received by Respondent: IADL

Same as help received for ADL's.

1.6.3 Help Received by Respondent: Other

N.A.

1.6.4 Help Provided by Respondent: to Household members

Family module asks Respondent whether he/she or the spouse assisted parents or parent-in-law in daily or other activities; how many hours per week and weeks in last year were spent by Respondent as well as spouse on such assistance for each parent or parent-in-law.

1.6.5 Help Provided by Respondent: to Grandchildren

These variables are in the Family module, asking about whether the Respondent spent any time taking care of grandchildren, who are the parents of these grandchildren, how many hours per week and weeks in last year were spent by Respondent as well as spouse on such care.

1.6.6 Help Provided by Respondent: to non-Household people

Caring for a non-household member is not captured as a question(s) in its own right, but only as one of the options for activities in last month question asked in the Health Status and Functioning module - "cared for a sick or disabled adult who does not live with you and who did not pay you for help".

1.7 Japan- Japanese Study on Aging and Retirement (JSTAR)

1.7.1 Help Received by Respondent: ADL

In the Health Status module, Respondent is asked for each ADL difficulty he/she reports previously, whether help is received, and from whom.

In the Medical and Nursing Care Services module, respondent is again asked about help received for personal care involving physical contact (such as help with changing clothes, bathing, eating, and going to the bathroom), from whom, and the frequency of such help over past 12 months.

1.7.2 Help Received by Respondent: IADL

In the Medical and Nursing Care Services module, the Respondent is asked about non-personal care received (household tasks, such as cooking, doing laundry, changing light bulbs, moving furniture, shopping, and tending the garden), from whom, and the frequency of such help over past 12 months.

1.7.3 Help Received by Respondent: Other

In the Medical and Nursing Care Services module, the Respondent is asked about help received with filling out tax returns, pension-related forms, or other documents for financial or legal matters; from whom, and the frequency of such help over past 12 months.

1.7.4 Help Provided by Respondent: to Household members

Respondent is asked in the Individual and Family Information module if he/she is currently, or likely to be in the future, involved in care of mother/father, mother-in-law/father-in-law. It also asks the same for respondent's spouse, and up to three more members.

Another set of questions in the Medical and Nursing Care Services module ask whether the Respondent provided the following kinds of help: personal care involving physical contact (such as helping change clothes, bathing, eating, and going to the bathroom), non-personal help (with household tasks, such as cooking, doing laundry, changing light bulbs, moving furniture, shopping, and tending the garden) and help with tax returns, pension-related forms, or other documents for financial or legal matters. For each of these three categories of help, he/she is asked who was helped (household and non-household members), and the frequency of such help over past 12 months.

1.7.5 Help Provided by Respondent: to Grandchildren

Not asked about separately.

1.7.6 Help Provided by Respondent: to non-Household people

Not asked about separately.

1.8 Ireland- The Irish Longitudinal Study on Aging (TILDA)

1.8.1 Help Received by Respondent: ADL

In the I(ADL) & Helpers module, Respondent is asked about help received or not with each ADL they report having a difficulty with in the preceding questions; followed by helper name, gender and relationship for a maximum of four helpers- starting with the person who helps the most. Quantity of help in days last month and hours per day is asked for each helper.

1.8.2 Help Received by Respondent: IADL

In the I(ADL) & Helpers module, Respondent is asked about help received or not with each IADL they report having a difficulty with in the preceding questions; followed by helper name, gender and relationship for a maximum of four helpers- starting with the person who helps the most. In addition, Respondent is also asked about the person who most often helps him/her manage money. Quantity of help in days last month and hours per day is asked for each helper.

1.8.3 Help Received by Respondent: Other

In the Transfers to Children module, Respondent is asked about practical household help received (e.g. with home repairs, gardening, transportation, shopping, household chores) and help received with paperwork, such as filling out forms, settling financial or legal matters; from his/her (and/or spouse's/partner's) children or grandchildren and relatives. It also asks about help with paperwork, such as filling out forms, settling financial or legal matters from relatives. For each of these, quantity of help in hours per month over last two years is asked.

1.8.4 Help Provided by Respondent: to Household members

In the Transfers to Children module, Respondent is asked about help provided (along with the spouse) to adult children and/or grandchildren as well as relatives regarding practical household help (e.g. with home repairs, gardening, transportation, shopping, household chores) and help with paperwork, such as filling out forms, settling financial or legal matters. For relatives, help with personal care (such as dressing, eating, getting into and out of bed, using the toilet) is also asked about.

Hours per month on average in the last years spent on helping adult children and/or grandchildren is combined for Respondent and spouse, but not for help to relatives.

1.8.5 Help Provided by Respondent: to Grandchildren

Transfers to Children module separately asks about care provided to adult children and/or grandchildren, and care provided to grandchildren or great grandchildren who live outside the household. For the latter, hours per month on average in last two years spent on such help is combined for Respondent and spouse.

1.8.6 Help Provided by Respondent: to non-Household people

Transfers to Children modules asks whether Respondent and/or spouse/partner helped friends or neighbors (who did not pay) with household help, help with personal care or help with paperwork. Hours per month on average in last two years spent on such help is asked only for Respondent.

1.9 Mexico- Mexican Health and Aging Study (MHAS)

1.9.1 Help Received by Respondent: ADL

In the Functionality and Help module, MHAS asks for each ADL the Respondent reports having a difficulty with, whether spouse helps, and whether anyone else helps (except for dressing for which it only asks if anyone helps). It then asks who helps with these difficulties- specific information like relationship to, and hours, are asked for each ADL helper.

1.9.2 Help Received by Respondent: IADL

In the Functionality and Help module, MHAS asks for each IADL ADL the Respondent reports having a difficulty with, whether spouse helps, and whether anyone else helps. It then asks who helps with these difficulties- specific information like relationship to, and hours, are asked for each IADL helper.

1.9.3 Help Received by Respondent: Other

Help and Children module asks Respondent whether his/her (or spouse's) children/their spouses/grandchildren spent at least one hour a week helping with household chores, errands, transportation, etc.

He/she is also asked about if neighbors or friends who can be counted on for daily activities, such as bringing food if Respondent is sick, or bringing something from the store.

1.9.4 Help Provided by Respondent: to Household members

Questions regarding care provided to parents & hours spent on this activity are located in the Parents and Help to Parents module, these are also asked for the Respondent's siblings (or their spouses). MHAS also asks about the number of siblings sharing the task of taking care of parents.

Questions regarding help provided to children/their spouses or grandchildren & hours spent on this activity, located in Help and Children module, are combined for Respondent and spouse.

1.9.5 Help Provided by Respondent: to Grandchildren

These are not asked separately for grandchildren, but combined with care for Respondent's/spouse's children/grandchildren who are then listed, hence identifiable.

1.9.6 Help Provided by Respondent: to non-Household people

N.A.

1.10 Indonesia- Indonesia Family Life Survey (IFLS)

1.10.1 Help Received by Respondent: ADL

The Health Conditions section (section KK) in book 3B, and book Proxy, (Respondent is an adult 15 years or older) asks the Respondent about assistance needed if he/she reports difficulty with any of the Daily Activities asked about in the preceding questions. It then goes on to ask the relationship to Respondent for person who helps the most, days in last month and hours per day for this helper, and whether or not this person is paid; any other helper is asked about as a yes or no question but further details about this helper are not captured.

It also asks who in the future can the Respondent expect assistance from.

1.10.2 Help Received by Respondent: IADL

Same as help received for ADL's.

1.10.3 Help Received by Respondent: Other

Non-coresident parents section (section BA) in Book 3B, and book Proxy, asks whether Respondent received any financial and non-financial help from dead non-coresident parents in the last 12 months before the parent's demise.

Non-coresident Siblings and Non-coresident Children sections ask about financial and non-financial help received in the last 12 months from siblings not living in the same household (including those who died within the last 12 months) and each non-coresident child respectively.

Same questions for each non-coresident child and each non-coresident adopted child are addressed to ever-married women, age 15-49 years, in Non-coresident Children section (section BA) and Non-Co Resident Adopted Child Roster (Section BX) respectively in Book 4.

Other Transfers section (section BA) in Book 3B, and book Proxy, asks about *combined* financial and non-financial assistance to Respondent and spouse from Respondent's spouse not in the household/Non-biological parents not in the household/Family members other than parents, siblings or children.

1.10.4 Help Provided by Respondent: to Household members

N.A.

1.10.5 Help Provided by Respondent: to Grandchildren

N.A.

1.10.6 Help Provided by Respondent: to non-Household people

In the Non-coresident parents section (section BA) in Book 3B, and book Proxy, Respondent is asked about financial and non-financial help provided to dead non-coresident parents in the last 12 months before the parent's demise.

Non-coresident siblings and Non-coresident Children sections (section BA) in ask about financial and non-financial help provided by Respondent in the last 12 months to siblings not living in the same household (including those who died within the last 12 months) and each non-coresident child respectively.

Same questions for each non-coresident child and each non-coresident adopted child are addressed to ever-married women, age 15-49 years, in Non-coresident Children section (section BA) and Non-Co Resident Adopted Child Roster (Section BX) respectively in Book 4.

Other Transfers section (section BA) in Book 3B, and book Proxy, asks about financial and non-financial assistance provided by Respondent or Spouse to Respondent's spouse not in the household/Non-biological parents not in the household/Family members other than parents, siblings or children.

2. METHODOLOGICAL ISSUES

In this section we will discuss the similarities and differences across surveys regarding informal care questions, broadly speaking- for how many activities (combined and separately) is help received available, variations in units of help received quantity, and differences in asking about help provided- types of help and unit of help provided quantity. Within each category, we list finer differences wherever applicable. This information will be critical in assessing whether, for each specific measure, cross-study comparisons are possible or hampered by methodological issues.

2.1 Help Received by Respondent: ADL

All the surveys ask about ADL difficulties. When it comes to help received for ADL difficulties, all surveys also ask whether the Respondent receives any help. However, there are variations regarding whether help received is asked for all ADL combined, all ADL & IADL combined, or separable by each activity.

ADL and IADL help is separable in HRS, LASI, JSTAR, TILDA & MHAS; ELSA, SHARE, KLoSA, CHARLS & IFLS combine the two.

Help received for each ADL is separable in HRS, JSTAR, TILDA & MHAS; in ELSA to a lesser extent since it combines help received for dressing with bathing, eating with preparing a hot meal, walking with getting in and out of bed and using the toilet.

For help with *each* difficulty:

- HRS and TILDA ask whether the Respondent receives help.
- MHAS asks whether spouse helps, and whether someone else helps.
- JSTAR asks who helps (allowing the identification of helpers into the following categories: Immediate family member who lives with you, Immediate family member who does not live with you, Other relative, Friend/acquaintance, Unpaid volunteer, Caregiver service, household employee, etc.)
- ELSA, while combining related ADL's and IADL'S, allows for an even finer helper identification, listing specific relationships.

All surveys allow identification of *at least one* ADL, or ADL & IADL helper- that is, either his/her relationship to Respondent, or any other status like professionals- typically starting with who helps the most. This identification varies across surveys- in terms of the number of helpers that are asked about, and their relationship to (or lack thereof) the Respondent- we list further details in section 2.5.

Note: The table we construct next focuses solely on “whether or not respondents *received* help”, and not on “whether the respondents were asked whether they *need* specific ADL/IADL help”.

Table 2.1: ADL Help Received Measures										
Survey/Variable	HRS	ELSA	SHARE	KLoSA	LASI	CHARLS	JSTAR	TILDA	MHAS	IFLS
Help for any/all ADL	✓	✓ ¹	✓ ⁴	✓ ¹	✓	✓ ¹	✓	✓	✓	✓ ¹
Help for specific activity										
Help with dressing	✓	✓	✓ ⁵				✓ ⁶	✓	✓	
Help with bathing	✓						✓	✓	✓	
Help with eating	✓	✓ ²					✓	✓	✓	
Help with walking across a room	✓	✓ ³					✓	✓	✓	
Help with getting in or out of bed	✓						✓	✓	✓	
Help with using the toilet	✓						✓ ⁷	✓	✓	
Helper Characteristics										
(Identity of)/(Relationship to) Respondent	✓	✓	✓	✓ ¹	✓	✓ ¹	✓	✓	✓	✓ ¹
Sex	✓							✓		
¹ combined for ADL & IADL activities										
² combined with help for preparing a hot meal										
³ covers help with moving- also includes climbing stairs										
⁴ asked for specific activities in Wave 1 & 2, combined personal care and practical household help in Wave 4										
⁵ Wave 1 & 2 only- can separate personal care (e.g. dressing, bathing or showering, eating, getting in or out of bed, using the toilet) from practical household help										
⁶ taking on and off socks and shoes										
⁷ Using a Western-style toilet (If you only use a Japanese-style toilet, imagine whether you would be able to use a Western-style toilet.)										

Note: A reference table where we list the specific variables utilized for building this comparison is in section 4, Table 4.1

2.2 Help Received by Respondent: IADL

In keeping with the discussion on ADL help, we elaborate in a similar manner on IADL help. With the exception of LASI (which does not ask about IADL difficulties), all surveys ask whether the Respondent receives any IADL help; albeit phrased slightly differently with the term IADL not always used.

IADL help is separable from ADL help in HRS, JSTAR, TILDA & MHAS; ELSA, SHARE, KLoSA, CHARLS & IFLS combine the two.

Help provided for each IADL is separable in HRS, TILDA & MHAS; in ELSA to a slightly lesser extent since it combines help received for preparing a hot meal with eating, grocery shopping with work around the house or garden, and help making telephone calls with managing money.

SHARE waves 1 & 2 ask what kinds of help was received- the options for which include personal care (counted as ADL help in section 2.1), practical household help (e.g. with home repairs, gardening, transportation, *shopping*, household chores) and help with paperwork, such as filling out forms, settling *financial* or legal matters- we count the second and third options as IADL help as well as Other help. These types of help are not asked about in SHARE wave 4.

For help with *each* difficulty:

- HRS and TILDA ask whether the Respondent receives help.
- MHAS asks whether spouse helps, and whether someone else helps.
- ELSA, while combining related ADL's and IADL's, allows for an even finer helper identification, listing specific relationships.

As with ADLs, IADL's Helper identification varies across surveys. This is further discussed in section 2.5

Identifying the person helping manage Respondent's finances may be of particular interest- HRS, ELSA and TILDA capture this information, MHAS can only identify if spouse helps or someone else helps. IADL's asked about in IFLS do not include help with managing money.⁴

⁴ IFLS does ask about days and months spent by Respondent and others in helping family business.

Table 2.2: IADL Help Received Measures										
Survey/Type of Help	HRS	ELSA	SHARE	KLoSA	LASI	CHARLS	JSTAR	TILDA	MHAS	IFLS
Help for any/all IADL	✓	✓ ¹	✓ ⁴	✓ ¹		✓ ¹	✓ ⁶	✓	✓	✓ ¹
Help for specific activity										
Help with preparing hot meals	✓	✓ ²						✓	✓	
Help with shopping for groceries	✓	✓ ³	✓ ⁵					✓	✓	
Help with making telephone calls	✓	✓						✓		
Help with managing money	✓		✓ ⁵					✓	✓	
Help with taking medications	✓	✓						✓	✓	
Helper Characteristics*										
(Identity of)/(Relationship to) Respondent	✓	✓	✓	✓ ¹		✓ ¹	✓	✓	✓	✓
(Identity of)/(Relationship to) Respondent-managing money	✓	✓						✓	✓ ⁷	
Sex	✓									
¹ combined for ADL & IADL activities										
² combined with help with eating										
³ combined with doing work around the house or garden										
⁴ asked for specific activities in Wave 1 & 2, combined personal care and practical household help in Wave 4										
⁵ Wave 1 & 2 only- can separate personal care from practical household help; practical household help, e.g. with home repairs, gardening, transportation, shopping, household chores ³ . help with paperwork, such as filling out forms, settling financial or legal matters										
⁶ non-personal care: help with household tasks, such as cooking, doing laundry, changing light bulbs, moving furniture, shopping, and tending the garden										
⁷ can only identify if spouse helps or someone else helps.										
*For all mentioned activities, unless specified otherwise										

Note: A reference table where we list the specific variables utilized for this comparison is in section 4, Table 4.2.

2.3 Help Received by Respondent: Other

In this section, we list all other kinds of help with activities which are not counted as ADLs or IADLs. Hence, this is where surveys vary the most.

○ *Household Chores:*

- HRS and ELSA ask about help received with work around the house/yard.
- MHAS asks about help with *household chores*, errands, transportation, etc.
- IFLS, when asking about types of help, lists ‘doing *household chores*, or providing child care or assisting during physical recovery’ as an option.
- SHARE (waves 1 & 2 only) ask about types of help received- one option for which is practical household help (e.g. with home repairs, gardening, transportation, shopping, *household chores*) - we count this as Other help as well as IADL help.

○ *Paperwork:*

SHARE (waves 1 & 2 only) ask about types of help received- one option for which is help with *paperwork* (such as filling out forms, settling financial or legal matters).

JSTAR asks about help received with filling out documents for pensions, taxes, or other financial or legal documents.

SHARE wave 4, and TILDA, also ask about practical household help and help with paperwork but these types of help received are not separable.

○ *Other help with mobility:*

ELSA & SHARE (waves 1 & 2) ask about help with mobility like walking 100 yards/meters, sitting, getting up from a chair, stooping, reaching, pulling, lifting, picking up a coin.

Note: ELSA’s list of activities also include- reading a map, speaking or recognizing danger.

Table 2.3: Other Help Received Measures										
Survey/Type of Help	HRS	ELSA	SHARE	KLoSA	LASI	CHARLS	JSTAR	TILDA	MHAS	IFLS
Help with paperwork			✓ ²				✓	✓ ⁴		
Help with work around the house or yard because of a health problem	✓	✓ ¹	✓ ²						✓ ⁵	✓ ⁶
Help with walking, sitting, getting up from a chair, stooping, reaching, pulling, lifting, picking up a coin		✓	✓ ³							
Relationship of Helper	✓	✓	✓				✓	✓	✓	✓
¹ combined with grocery shopping										
² practical household help and help with paperwork separable in Wave 1 and 2										
³ available in Wave 1 and 2										
⁴ 1) Practical household help, e.g. with home repairs, gardening, transportation, shopping, household chores 2) Help with paperwork, such as filling out forms, settling financial or legal matters										
⁵ household chores, errands, transportation, etc.										
⁶ Doing household chores, or providing child care or assisting during physical recovery										

2.4 Help Received- Quantity

Extent of help received is measured in terms of frequency in ELSA, SHARE & JSTAR; number of hours per day and days in the last month in HRS, KLoSA, LASI, CHARLS, TILDA & MHAS. IFLS is the only survey with a longer recall period- twelve months. We also list for which kind of helper can extent of help be captured. These are important differences to be taken into account when constructing harmonized measures.

All surveys, except ELSA & SHARE, ask about quantity of help received from at least one ADL helper. The differences are as follows:

- HRS asks about help received, from each helper, in terms of days in last month or days per week, and hours per day.
- ELSA only asks about the frequency of help received from Social Services and Privately paid help; only in Wave 4.
- SHARE only asks about frequency of help received from outside the household, hours for the same are asked only in waves 1 & 2.
- KLoSA, CHARLS & TILDA ask about help received, from each ADL/IADL helper, in terms of days in last month and hours per day.
- TILDA also asks about hours per month on average in last 2 years, of practical household help and help with paperwork from each of the following: children or grandchildren, relatives, neighbors or friends.
- LASI asks about help received, from one ADL helper, in terms of days in last month and hours per day.
- JSTAR does not ask about ADL help quantity while asking about ADL limitations, but asks about frequency of help received for each of these: ADL help (personal physical tasks such as changing clothes, bathing, eating, going to the bathroom, or other personal tasks involving physical contact-), IADL help) and help with paperwork.
- MHAS asks about help received, from each ADL helper and each IADL helper, in terms of days in last month and hours per day.
- IFLS asks about help received, from one ADL/IADL helper and each of Other helpers, in terms of days/months during the past year.

Table 2.4: Quantity/Frequency of Help received

Survey/ Measure	HRS	ELSA ¹	SHARE	KLoSA	LASI	CHARLS	JSTAR	TILDA	MHAS	IFLS
Unit	Days in last month/Days per week/hours per day	1 Every day or nearly everyday	1. Almost daily	days during past month	days in last month	days in last month	In last 12 months	hours per month on average in last 2 years	days, hours	days during past month
		2 Two or three times a week	2. Almost every week				1. Every day			3. Every month
		3 Once a week	3. Almost every month				6. Refused to answer	days during the last month, hours per day		days, months
		4 Less often	4. Less often							
		96 Not at all	[hours in last twelve months] ²	hours per day	hours per day	hours per day				
Asked for	Each Helper	Social Services and Privately paid help	family member from outside the household, any friend or neighbor	ADL/IA DL helpers	ADL helper	ADL/IADL helpers	personal care (ADL)	Other help from- children (or grandchildren), relatives, neighbors or friends	Each ADL and IADL Helper	ADL/IADL Helper
							non-personal care (IADL)			
							help with paperwork		Other Helper(s)	
¹ not asked in Wave 1, 2 and 3										
² only in Wave 1 and 2										

2.5 Help Received- Differences in Helper Characteristics

The surveys differ in the number of helpers asked about- some allow multiple responses while some place a maximum limit, and how their relationship to Respondent is captured. In this section, we identify these differences.

2.5.1 Number of Helpers

- HRS lists up to seven ADL helpers, six IADL helpers.
- ELSA allows multiple responses for identification of helpers for each set of difficulties.
- SHARE identifies one household helper and one non-household helper.
- KLoSA allows information for a maximum of five ADL & IADL helpers (three helpers in wave 1).
- LASI allows for identification of one ADL helper, but does ask number of ADL helpers.
- CHARLS allows information for a maximum of three ADL & IADL helpers.
- JSTAR identifies helper for each ADL, and allows multiple responses for helpers regarding personal physical tasks as well as household tasks.
- TILDA identifies up to four ADL helpers and IADL helpers each.
- MHAS allows multiple responses for information on ADL helpers as well as IADL helpers.
- IFLS identifies one ADL & IADL helper; though it asks if anyone else helps, that person is not identified.

2.5.2 Relationship to Respondent

There are inter-survey differences in listing helper relationships, and a few instances of intra-survey i.e. across wave changes, though minor. We highlight options that cannot be considered informal care givers. This can be utilized in carefully identifying various sources of help, for example- household vs non-household, paid vs unpaid.

KLoSA, LASI, CHARLS, IFLS have separate questions determining whether the listed helper(s) are paid.

Table 2.5: Helper Differences

Survey/Measure	HRS 2010	ELSA	SHARE	KLoSA	LASI
Relationship to Respondent	1. Self 2. Spouse - partner 3. Son 4. Stepson 5. Spouse/partner of daughter (son-in-law) 6. Daughter 7. Stepdaughter 8. Spouse/partner of son (daughter-in-law) 9. Grandchild 10. Father 11. Father of spp 12. Mother 13. Mother of spp 14. Parents 15. Brother 16. Brother in law 17. Sister 18. Sister in law 19. Other relative 20. Other individual 21. Organization 22. Employee of institution 23. Paid helper 24. Professional 25. Professional (specify) 26. Late spouse partner 27. Ex spouse partner 28. Unlisted child or child-in-law 30. Former step-child	1 Husband or wife or partner 2 Son 3 Daughter 4 Sister 5 Brother 6 Other relative 7 Privately paid help 8 Local authority/social services helper e.g. home care worker 9 Nurse, e.g. health visitor or district nurse 10 Member of staff at the care/nursing home 11 Friend or neighbor 95 Other person 96 Does not get any help	family member from outside the household, any friend or neighbor	2 Spouse 3 Mother 4 Father 5 Mother-in-law 6 Father-in-law 7 ~ 26 Children 27 ~ 46 Sibling 47 Brother-in-law/sister-in-law 48 Son-in-law/sister-in-law 49 Grandchild 50 Other relatives 52 Voluntary worker 53 Publicly provided helper 54 Personally hired helper 55 Helper or other non-relatives 56 No one helped <i>[separate question determining paid helper from above- C221 in Wave 2 & 3, Cb21 Cb25 Cb29 in Wave 1]</i>	Household members from CAPI & 1 Spouse or partner 2 Son (biologic, in-law, or step son) 3 Daughter (biologic, in-law, or step daughter) 4 Grandchild 5 Father 6 Father of spouse or partner 7 Mother 8 Mother of spouse or partner 9 Brother 10 Brother-in-law 11 Sister 12 Sister-in-law 13 Other relative 14 Non-professional, paid helper 15 Professional (paid or non-paid) 16 Ex spouse or partner 17 Other, please specify <i>[separate question determining paid helper HT412a]</i>

	<p>31. Former child in law</p> <p>33. Grandchild in law</p> <p>90. Unknown child</p> <p>91. Unknown in law</p>				
Cross Wave Differences		Options [mother, father, grandson, granddaughter, son-in-law, daughter-in-law] listed in Wave 1, 2 & 3		Options [Voluntary worker, Publicly provided helper, Personally hired helper] not listed in Wave 1	

Table 2.5 (continued): Helper Differences

Survey/ Variable	CHARLS	JSTAR	TILDA	MHAS	IFLS
Relationship to Respondent	CAPI list: 1 Spouse 2 Mother 3 Father 4 Mother-in-law 5 Father-in-law 6 ~ 30 Children 31 Sibling 32 Sibling of spouse 33 Brother-in-law, sister-in-law 34 Spouse of child 35 Grandchild 36 Other relative 37 Paid helper (such as nanny) 38 Volunteer or Employee of facility 39 Other 40 No one helped <i>[separate questions determining for above: co-residence (DB025) and paid help (DB206)]</i>	1. Family member(s) living together 2. Family member(s) living separately 3. Relative(s) other than family member(s) 4. Friend(s), acquaintance(s), etc. 5. Volunteer helper(s) 6. Public caregiver, private housekeeper, etc.	1. Spouse / partner 2. Child/ adopted child 3. Step Child 4. Child-in-law (daughter-in-law, son-in-law) 5. Parent 6. Parent-in-law 7. Brother or sister 8. Brother-in-law/Sister-in-law 9. Grandparent 10. Grandparent-in-law 11. Other blood relative 12. Other in-law 13. Grandchild 14. Non-relative	01. Spouse 02. Child 03. Child-in-law 04. Grandchild 05. Parent 06. Other relative 07. Other person 08. Paid person 88. RF 99. DK	ADL/IADL Help: 02. Spouse 03. Child (biological) 04. Child (adopted) 05. Son/daughter in law 06. Parent 07. Father/mother in law 08. Sibling 09. Brotherssister in law 10. Grandchild 11. Grandparent 12. Uncle/aunt 13. Nephew/Niece 14. Cousin 15. Servants 16. Other relative 17. Other non relative Other Help: Non-coresident: parents, siblings, children, adopted children, others
Cross Wave Differences				Spouse not listed in Wave 1	

2.6 Help Provided by Respondent: to Household members

We now move on to help provided by the Respondent, starting with help provided to household/co-residing members. Questions asking exclusively about taking care of grandchildren are discussed in the next section, 2.7. The surveys vary in asking about this help along three dimensions: who is helped, what kind of (activities for which) help is given, and the way quantity of such help provided is captured.

2.6.1 Household members: Help whom?

HRS, ELSA, KLoSA, CHARLS & JSTAR ask specifically about help provided to parents and parents-in-laws; MHAS asks about parents. SHARE and LASI ask about help provided to household member with personal care/daily activities. TILDA asks about help provided to *adult* children and/or grandchildren, and relatives.

IFLS does not ask about help provided to co-resident family members.

Table 2.6.1: Help provided to which Household Member

Survey/Variable	HRS	ELSA	SHARE	KLoSA	LASI
Help Whom?	1. Mother (and/or her husband) 2. Father (and/or his wife) 4. Mother's husband 5. Father's wife 8. Don't Know; Not Ascertained 9. Refused	1 Spouse or partner 2 Child 3 Grandchild 4 Parent 5 Parent in law 6 Other relative 7 Friend or neighbor 95 other	Household member identified	② Spouse ③ Mother ④ Father ⑤ Mother-in-law ⑥ Father-in-law ⑦ ~ ⑫ Children ⑬ ~ ⑰ Sibling ⑱ Brother-in-law/sister-in-law ⑲ Son-in-law/sister-in-law ⑳ Grandchild ㉑ Other relatives (53) Did not help (They were helped by other helpers, etc.	Family Member unable to carry out daily activities

Table 2.6.1 (continued): Help provided to which Household Member					
Survey/Variable	CHARLS	JSTAR	TILDA	MHAS	IFLS
Help Whom?	(1) Your father	mother	adult children	1. Mother	NA
	(2) Your mother	father	and/or	2. Father	
	(3) Your father-in-law		grandchildren	3. Both	
	(4) Your mother-in-law	father-in-law	relatives	your children/their spouses/your grandchildren (or those of your spouse)	
		mother-in-law			
		family members, relatives, friends, or neighbors			

2.6.2 Household members: Types of Help provided

HRS:

- basic personal activities like dressing, eating, and bathing
- household chores, errands, transportation, etc.

ELSA: ‘Look After’: ‘Active Provision of Care’

SHARE: personal care, such as washing, getting out of bed, or dressing

KLoSA: help with activities of daily living

LASI: help with basic daily activities refer to everyday routines such as eating, putting on clothes, taking a bath, and using the toilet, etc.

JSTAR:

- care (includes regular visits to an institutionalized parent)
- personal care involving physical contact, such as helping change clothes, bathing, eating, and going to the bathroom

- non-personal help- household tasks, such as cooking, doing laundry, changing light bulbs, moving furniture, shopping, and tending the garden
- fill out tax returns, pension-related forms, or other documents for financial or legal matters

TILDA:

For adult children and grandchildren:

- 1) Practical household help, e.g. with home repairs, gardening, transportation, shopping, household chores
- 2) Help with paperwork, such as filling out forms, settling financial or legal matters

For relatives:

- 1) Practical household help, e.g. with home repairs, gardening, transportation, shopping, household chores
- 2) help with personal care, such as dressing, eating, getting into and out of bed, using the toilet
- 3) help with paperwork, such as filling out forms, settling financial or legal matters

MHAS: basic activities such as dressing, eating or bathing because of a health problem. Exclude help with household chores, errands and transportation.

IFLS: N.A.

2.6.3 Household members: Quantity of Help provided

Frequency of help provided is asked about in three surveys- LASI, JSTAR & MHAS. All except SHARE and JSTAR measure quantity of help provided, in hours with varying recall periods; KLoSA and CHARLS also ask about weeks in last year.

HRS is the only survey to employ unfolding brackets.

Table 2.6.3a: Quantity of Help Provided to Household Member

Survey/ Variable	HRS 2010	ELSA	SHARE	KLoSA	LASI	CHARLS	JSTAR	TILDA	MHAS	IFLS
Unit	Hours since last wave	Hours in last week	NA	hours per week weeks during last year	hours per week/day /month	weeks last year hours per week	NA	hours per month on average in last 2 years	hours per day/week /month/year	NA
Quantity: Unfolding brackets used	Breakpoints: 200, 500; Entry point: 200	NA	NA	NA	NA	NA	NA	NA	NA	NA

Table 2.6.3b: Frequency of Help provided to Household Member

LASI	JSTAR	MHAS
1. Daily	1. Every day	1. less than 2 hours a week
2. Several times a week	2. Every week	2. from 2 to 4 hours a week
3. Once a week	3. Every month	3. more than 4 hours a Week
4. Several times a month	4. Several times a year	8. RF
5. At least once a month	5. Don't know	9. DK
6. Not in the last month	6. Refused to answer	

2.7 Help Provided by Respondent: to Grandchildren

In all surveys, except JSTAR, help provided to grandchildren is either specifically asked about- HRS, SHARE, KLoSA, LASI, CHARLS and TILDA; or is identifiable as answers to help provided questions- as is the case with ELSA and MHAS.

TILDA separately asks about help given to *adult* children/grandchildren (which we count as help provided to household members in section 2.6) and grandchildren/great grandchildren who live outside the household- the latter is considered in this section.

IFLS, since not an ageing study, does not ask about this.

Quantity/time spent: all surveys (which ask about taking care of grandchildren) capture quantity of care provided in terms of hours, albeit with varying recall periods. CHARLS also asks weeks

spent last year on this activity. KLoSA (waves 2 & 3) separately asks about care given to grandchildren before they reached the age of 10- hours per week and years in total, and about care given to any grandchildren below age 10 during last year- hours per week and weeks last year.

How many grandchildren/who are the parents: HRS, SHARE, KLoSA and CHARLS identify the parents of the grandchildren the Respondent takes care of. ELSA & MHAS identify how many grandchildren were taken care of, KLoSA also asks the number of grandchildren both above 10 years of age and below that were/are taken care of. LASI and TILDA do not capture this information.

Table 2.7: Help provided to Grandchildren

Survey/ Variable	HRS	ELSA	SHARE	KLoSA	LASI	CHARLS	JSTAR	TILDA	MHAS	IFLS
Asked about Help Provided?	✓	✓	✓	✓	✓	✓		✓	✓	
(How many)/ Who's	who's (up to six)	how many	who's	how many who's		who's			how many	
Unit	Hours since last wave	Hours in last week	[hours in last twelve months] ¹	years, weeks last year hours per week	hours per week on average	weeks last year hours per week		hours per month on average	hours per day/week/month/year	
Quantity: Unfolding brackets used	Breakpoint s: 0, 200, 500; Entry point: 200									

¹ only in Wave 1 & 2

Note: refer to table 4.6 in section 4 for variables utilized in above comparison.

2.8 Help Provided by Respondent: to non-Household/non-coresident persons

In keeping with the discussion on help provided to household members, we discuss methodological issues regarding help provided to non-household persons along three dimensions: who is helped, what kind of help is given, and the way quantity of help provided is captured.

These set of measures are not asked about in LASI, JSTAR & MHAS; neither in waves 1, 2 & 3 of ELSA.

2.8.1 Non-household persons: Help whom?

HRS, ELSA, SHARE & TILDA ask about help given to friends or neighbors or relatives who did not pay for the help. KLoSA lists the relationships for non-coresiding person who was helped. CHARLS does not have a separate question about this, but captures ‘caring for a sick or disabled adult who does not live with you and who did not pay you for help’ while asking the Respondent’s activities last month. IFLS separately asks about help provided to each of the following non-coresident relatives -parents, siblings, children, adopted children, others.

Table 2.8.1: Help whom outside the Household										
Survey/ Variable	HRS	ELSA	SHARE	KLoSA	LASI	CHARLS	JSTAR	TILDA	MHAS	IFLS
Help Whom?	friends, neighbor s, or relatives who did not live with you and did not pay you for the help	friend, neighbor or someone else, but not a relative-unpaid help	family member from outside the household, friend or neighbor	Not living with you: 2 Spouse 3 Mother 4 Father 5 Mother-in-law 6 Father-in-law 7 ~ 26 Children 27 ~ 46 Sibling 47 Brother-in-law/sister-in-law 48 Son-in-law/sister-in-law 49 Grandchild 50 Other relatives (54) Did not help	NA	sick or disabled adult who does not live with you and who did not pay you for help	NA	friends, and neighbors (who did not pay you)	NA	Non-coresident: parents, siblings, children, adopted children, others

2.8.2 Types of help provided

HRS: not mentioned

ELSA:

- 1 Keeping in touch with someone who has difficulty getting out and about (visiting in person, telephoning or emailing)
- 2 Doing shopping, collecting pension or paying bills
- 3 Cooking, cleaning, laundry, gardening or other routine household jobs
- 4 Decorating or doing any kind of home or car repairs
- 5 Babysitting or caring for children
- 6 Sitting with or providing personal care (washing, dressing) for someone who is sick or frail
- 7 Looking after a property or a pet for someone who is away
- 8 Writing letters or filling in forms
- 9 Representing someone (for example talking to a council department, or to a doctor)
- 10 Transporting or escorting someone (for example to a hospital or to an outing)

SHARE: personal care or practical household help- separable as personal care, practical household help, help with paperwork in Wave 1 and 2, combined in Wave 4.

KLoSA: various activities he/she is unable to do due to physical or mental weakness (e.g. personal grooming, cleaning and tidying up the house, making bed and washing dishes, etc., preparing meals, doing laundry, going out a short distance, using transportation, shopping, managing money, making and taking phone calls, and taking medications)

CHARLS: care for a sick or disabled adult.

TILDA:

- 1) household help: help with home repairs, gardening, transportation, shopping, household chores
- 2) help with personal care, such as dressing, eating, getting into and out of bed, using the toilet
- 3) help with paperwork, such as filling out forms, settling financial or legal matters.

IFLS:

Doing household chores, or providing child care or assisting during physical recovery.
 Helping family business.

2.8.3 Quantity of Help Provided

HRS is the only survey to capture the amount of help provided to non-household persons in terms of brackets, using the unit hours last year.

ELSA, SHARE and CHARLS ask about frequency of help provided. KLoSA asks for hours per week and weeks during last year, TILDA asks for hours per month on average in last two years, IFLS allows Respondent to answer in terms of either days or months in last year spent on such help.

Survey/ Variable	HRS	ELSA	SHARE	KLoSA	LASI	CHARLS	JSTAR	TILDA	MHAS	IFLS
Frequency		1 every day 2 at least once a week, 3 less than once a week but at least once a month, 4 or less often? 5 One-off activity	In the last 12 months: 1. Almost daily 2. Almost every week 3. Almost every month 4. Less often		NA	Almost daily Almost every week Not regularly	NA		NA	
Unit	>=< 100, >=< 200, >=< 50 hours last year		[hours in last twelve months] ¹	hours per week weeks during last year				hours per month on average in last 2 years		days/ months
¹ only in Wave 1 & 2										

Note: Refer to table 4.7 in section 4 for variables utilized for the non-household help comparison.

3. USING MEASURES IN CROSS-COUNTRY ANALYSIS

To harmonize informal help received and given, we first need to be clear on the concept we're measuring, and accordingly what to include and separate out. Informal care received would exclude institutional or paid help. Hence when computing measures of help received, separate out, wherever identifiable, help provided by employees of an institution, nurses/nannies, professional/paid/hired helpers to begin with (utilize Table 2.5 on differences in Helper identification).

3.1 Help Received by Respondent: ADL

A broad measure of help- binary indicator of whether help received for ADLs &/ IADLs- can be compared across all surveys.

For any ADL help: HRS, LASI, JSTAR, TILDA & MHAS are most comparable since they allow separability of ADL help from IADL help.

Help with specific ADL's: JSTAR, TILDA & MHAS align well with the HRS. However, while looking into cross country comparisons of ADL help with each activity discussed in this guide, i.e. human assistance, we suggest researchers also account for mechanical assistance (like devices, equipment etc.) as mechanical assistance may be able to substitute or further complement human help.

While constructing comparable measures like amount of help received, it is imperative to consider variations in the number of helpers and units of time spent by them. For example, one could proceed as follows:

- Amount of ADL &/ IADL help: can compare amount for *helper who helps the most* for HRS, KLoSA, LASI, CHARLS, TILDA, MHAS and IFLS- all measured in the same unit of days during past month. *Total ADL &/ IADL help* received is most comparable for HRS, KLoSA, CHARLS, TILDA and MHAS- sum up help by all helpers; LASI and IFLS drop out since they only allow amount of help from one helper, and also because LASI does not include IADL help.
- Amount of ADL help: For HRS, TILDA, MHAS, IFLS- sum up quantity of help provided by each ADL helper in the unit days in last month.

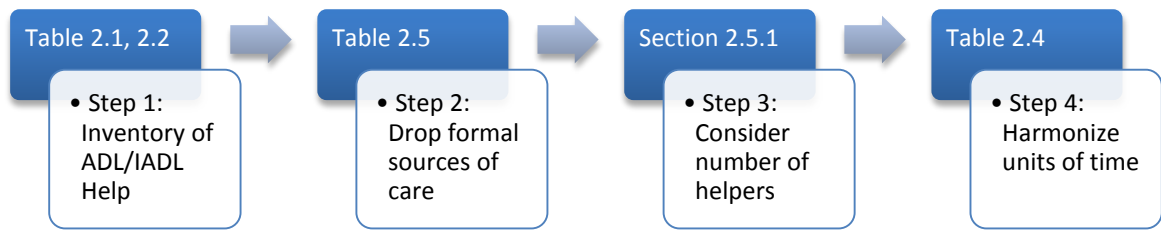
3.2 Help Received by Respondent: IADL

For any IADL help: HRS, JSTAR, TILDA & MHAS are most comparable since they allow separability of ADL help from IADL help.

Help with specific IADL's: TILDA & MHAS align well with the HRS.

Amount of only IADL help (i.e. not including ADL help): only the MHAS can be compared to the HRS, JSTAR to a lesser extent since it asks for amounts in terms of frequency and we would need to approximate it to a 'days in past month' measure, e.g. if everyday- covert it to thirty days, if every week- approximate it to four/five days and so on.

Figure 1: Constructing cross-country measure of amount of help received.



3.3 Help Received by Respondent: Other

This is the *least comparable* measure of help received across all surveys.

Help received for household chores can be compared for HRS, ELSA, MHAS, IFLS and to a lesser extent for SHARE (waves 1 & 2 only).

Help with paperwork can be compared only across SHARE (waves 1 & 2 only) and JSTAR. Other help with mobility can be compared only across ELSA and SHARE (waves 1 & 2).

3.4 Help Provided by Respondent: to Household members

A binary measure of whether help given to Parents & Parents-in-law is comparable across HRS, ELSA, KLoSA, CHARLS, JSTAR and MHAS (MHAS does not ask about parents-in-law). In order to compare the amounts of such help given, utilize table 2.6.3b to standardize units of time.

3.5 Help Provided by Respondent: to Grandchildren

A binary measure of whether care was provided to grandchildren is comparable across HRS, ELSA, SHARE, KLoSA, LASI, CHARLS, TILDA and MHAS.

To compare amount of time spent on this activity across these surveys, all of which ask about hours spent, but the recall periods differ. We recommend using the unit hours per week, so the hours would need to be accordingly scaled down for HRS, ELSA & TILDA.

3.6 Help Provided by Respondent: to non-Household persons

This the least comparable category of help provided by Respondent.

The binary measure of whether Respondent helped friends or neighbors is comparable across HRS, ELSA, SHARE & TILDA- extent of this help can be compared best for ELSA & TILDA since both ask for frequencies.

4. QUESTION CONCORDANCE

Section 4.1 to 4.7 list variables corresponding to topics from Section 2.1 to 2.8. Section 4.8 lists each question by survey.

4.1 Variables: ADL help Received

Survey/ Variable	HRS 2010	ELSA	SHARE	KLoSA	LASI	CHARLS	JSTAR	TILDA	MHAS	IFLS
Help for any/all ADL	MG015, MG020, MG022, MG024, MG029, MG031, MG035_1~7	HEHPA	PH050 ¹ , SP002, SP007 SP020	C218 ²	HT407	DB022	D-013-X-Y (X: 1~6; Y: 1~6) H-052, H-053	FL005, FL008, FL011 FL013, FL016, FL019	H14, H15E, H15F, H16E, H16F, H17E, H17F, H18E, H18F, H19E, H19F ³	KK04b, KK04h, KK04j
Help for specific activity										
Help with dressing	MG015	HEHPW	SP004 ¹				D-013-1-Y(Y: 1~6)	FL005	H14	
Help with bathing	MG022						D-013-3-Y(Y: 1~6)	FL011	H16E, H16F	
Help with eating	MG024	HEHPD					D-013-4-Y(Y: 1~6)	FL013	H17E, H17F	
Help with walking across a room	MG020	HEHPH					D-013-2-Y(Y: 1~6)	FL008	H15E, H15F	
Help with getting in or out of bed	MG029						D-013-5-Y(Y: 1~6)	FL016	H18E, H18F	
Help with using the toilet	MG031						D-013-6-Y(Y: 1~6)	FL019	H19E, H19F	
Helper Characteristics										
(Identity of)/(Relationship to) Respondent	MG032_1~7, MG033_1~7	HEHPW, HEHPD, HEHPH	SP002, SP003 SP021 SP023,	C218 ²	HT408a, HT409a	DB022, DB022_a	D-013-X-Y (X: 1~6; Y: 1~6) H-053-1	FL020, fl020a, FL021, FL022_1~3, FL023_1~3,	H22, H23	KK04c, KK04d, KK04j, KK04k

			SP026					FL024_1~3		
Sex	MG074							FL020b, FL023b_1~3		
¹ only in wave 1 & 2										
² Cb18 Cb22 Cb26 in Wave 1										
³ E/F correspond to 3/4 in Wave 1										

4.2 Variables: IADL help Received

Table 4.2: IADL Help Question Reference

Survey/Type of Help	HRS 2010	ELSA	SHARE	KLoSA	LASI	CHARLS	JSTAR	TILDA	MHAS	IFLS
Help for any/all IADL	MG043, MG046, MG049, MG061, MG053	HEHPA	PH050 ¹ , SP002, SP007 SP020	C218 ²		DB022	H054	FL026, FL027, FL028, FL029, FL030, FL031	H26D~E, H27 D~E, H28 D~E, H29 D~E, ³	KK04b, KK04h, KK04j
Help for specific activity										
Help with preparing hot meals	MG043	HEHPD						FL026	H26D, H26E	
Help with shopping for groceries	MG046	HEHPP	SP004 ¹					FL028	H27D, H27E	
Help with making telephone calls	MG049	HEHPT						FL029		
Help with managing money	MG061		SP004 ¹					FL031	H29D, H29E	
Help with taking medications	MG053	HEHPM						FL030	H28D, H28E	
Helper Characteristics*										
(Identity of)/(Relationship to) Respondent	MG054_1~6 MG055_1~6	HEHPD, HEHPP, HEHPT, HEHPM	SP002, SP003 SP021 SP023, SP026	C218 ²		DB022	H-054-1	FL032, fl032a, FL033, FL034, fl034b_1~3 FL035_1~3, FL036_1~3	H32, H33_1~12	KK04c, KK04d, KK04j, KK04k
(Identity of)/(Relationship to) Respondent- managing money	MG062_1~2 MG063_1~2	HEHPT						FL037, fl037a, FL037b, FL038, FL039, fl039b_1~3 FL040_1~3, FL040b_1~3, FL041_1~3	H29D, H29E	
Sex	MG074							FL032b, FL035b_1~3		
*For all mentioned activities, unless specified otherwise										

¹ only in wave 1 & 2

² Cb18 Cb22 Cb26 in Wave 1

³ D/E correspond to 3/4 in Wave 1

4.3 Variables: Other Help received

Table 4.3 : Other Help Question Reference

Survey/Type of Help	HRS	ELSA	SHARE	KLoSA	LASI	CHARLS	JSTAR	TILDA	MHAS	IFLS
Help with paperwork			SP004 ¹				H-055 ²	TC021,		
help with work around the house or yard because of a health problem	MG058	HEHPP	SP004 ¹					TC023, TC027	G24 ³ G29 ⁴	BA21, BA22 BA56, BA57 B89a, B90 BX89a, BX90 TF05, TF06
Help with walking, sitting, getting up from a chair, stooping, reaching, pulling, lifting, picking up a coin, reading a map, speaking or recognizing danger		HEHPB	PH050 ¹							
(Relationship to)/(Sex of) Helper	MG074						H-055-1	TC021, TC023, TC027	G25_1~3 ⁵ , G29 ⁴	
¹ only in Wave 1 and 2										
² filling out tax returns, pension-related forms, or other documents for financial or legal matters										
³ household chores, errands, transportation, etc; G25 in Wave 1.										
⁵ G26_1~3 in Wave 1										
⁴ bringing food if you are sick, or bringing you something from the store; G30 in Wave 1										

4.4 Variables for Help Received- Quantity

Table 4.4: Quantity/Frequency of Help received Question Reference

Survey/ Type of Help	HRS 2010	ELSA	SHARE	KLoSA	LASI	CHARLS	JSTAR	TILDA	MHAS	IFLS
Unit	MG070, MG071, MG072, MG073	HEHPLA, HEHPPD	SP005, SP006 ¹	C219 ² , C220 ³	HT410a, HT411a	DB023, DB024	H-053-2, H-054-2, H-055-2	TC022, TC024, TC028 FL042_1~34, FL043_1~34	H24, H25, H34, H35	KK04e, KK04f BA22 BA57 B90, BX90 TF06
¹ only in Wave 1 and 2										
² Cb19 Cb23 Cb27 in Wave 1; ³ Cb20 Cb24 Cb28 in Wave 1										

4.5 Variables: Help Provided by Respondent to Household members

Table 4.5: Help provided to Household Members Question Reference

Survey/Variable	HRS 2010	ELSA	SHARE	KLoSA	LASI	CHARLS	JSTAR	TILDA	MHAS	IFLS
Asked about Help Provided?	MF119	ERCAA,	SP018	Bb170 ¹	FS408	CF004	A-016-1, A-021-1	TC014	F43 ⁵	
	MF139	ERResCk					H-046, H-047, H-048, H-049			
Help Whom?	MF120M1~3	ERCAB, ERCAX,	SP019,	Bb170 ¹		CF005	A-016-1	TC014	F45	
	MF140M1~2	ERCABNum, ERCALIVE, ERCADPN	SP025				A-0211	TC025	G10 ⁸ , G11 ⁹	
Types of Help	MF119	ERCAA	SP018	Bb169 ²	FS407 identifies members with Basic daily activities difficulties		A-016-1		TC014	F43 ⁵
	MF139						H-047	TC025		
							H-048			
							H-049			
Frequency				FS408a		H-047-2, H-048-2, H-049-2		G13 ¹¹		
Quantity: hours/days/weeks/months	MF122_1~3	ERCAC (combined for all)		Bb171 ³	FS409	CF005_1~8		TC015, TC026	F44 ⁶ , F46_1, F46_2 ⁷	
	MF142_1~2			Bb172 ⁴					G12_1, G12_2 ¹⁰	
Quantity: Unfolding brackets used	MF124_1~3, MF125_1~3, MF126_1~3									

MF144_1~2, MF145_1~2, MF146_1~2										
¹ B180 in Wave 1; ² B179 in Wave 1; ³ B181 in Wave 1; ⁴ B182 in Wave 1										
⁵ F37 in Wave 1; ⁶ F38 in Wave 1; ⁷ F40_1 F40_2 in Wave 1;										
MHAS: ⁸ G11 in Wave 1; ⁹ G12 in Wave 1; ¹⁰ G13_1 G13_2 in Wave 1; ¹¹ G14 in Wave 1;										

4.6 Variables: Help Provided by Respondent to Grandchildren

Table 4.6: Help provided to Grandchildren Question Reference

Survey/Variable	HRS 2010	ELSA	SHARE	KLoSA	LASI	CHARLS	JSTAR	TILDA	MHAS	IFLS
Asked about Help Provided?	ME060	ERCAA,	SP014	Ba069 ²	FS226	CF001		TC014,	G10 ⁶	
		ERCAB		Ba075 ³				TC016		
(How many)/Who's	ME061M1~6	ercangc, ercamgc	SP015	Ba070 ² , Ba071 ² , Ba072 ²		CF002			G11 ⁷	
				Ba076 ² , Ba077 ² , Ba078 ²						
Frequency			SP016						G13 ⁸	
Unit	ME063	ERCAC (combined for all)	SP017 ¹	Ba073 ² , Ba074 ²	FS227	CF003_1		TC015,	G12_1,	
				Ba079 ⁴ , Ba080 ⁵		CF003_2		TC017		
Quantity: Unfolding brackets used	ME065, ME066, ME067									
¹ only in Wave 1 & 2										
² not in Wave 1										
³ Ba048 in wave 1; ⁴ Ba049 in Wave 1; ⁵ Ba050 in Wave 1										
MHAS: ⁶ G11 in Wave 1; ⁷ G12 in Wave 1; ⁹ G13_1 G13_2 in Wave 1; ⁸ G14 in Wave 1										

4.7 Variables: Help Provided by Respondent to non-Household persons

Table 4.7: Help provided to non-Household Question Reference

Survey/Variable	HRS 2010	ELSA	SHARE	KLoSA	LASI	CHARLS	JSTAR	TILDA	MHAS	IFLS
Asked about Help Provided?	MG198	ERIVIN, ERIVOL	SP008, SP013	Bb173 ²		DA056		TC029		BA19
										BA54
										BA87a, BX87a
										TF03
Help Whom?	MG198	ERIVOL	SP009, SP024	Bb173 ²		DA056		TC029		BA19
										BA54
										BA87a, BX87a
										TF03
Types of Help		ERIVOL	SP008, SP010 ¹	Bb173 ²				TC029		BA20
										BA55
										B88, BX88
										TF04
Frequency		ERIVOFT	SP011			DA057				
Quantity: hours/days/weeks/months	MG199, MG200, MG201		SP012 ¹	Bb174 ³				TC030		BA20
				Bb175 ⁴						BA55
										B88, BX88
										TF04
¹ only in Wave 1 and 2										
² B183 in Wave 1; ³ B184 in Wave 1; ⁴ B185 in Wave 1										

4.8 Question Index by Survey

4.8.1 HRS

MG198: Have you spent any time in the past 12 months helping friends, neighbors, or relatives who did not live with you and did not pay you for the help?

Answer:

1. YES
5. NO
8. DK (Don't Know); NA (Not Ascertained)
9. RF (Refused)

MG199: Altogether, would you say the time amounted to less than 100 hours, more than 100 hours, or what?

Answer:

1. LESS THAN 100 HOURS
3. ABOUT 100 HOURS
5. MORE THAN 100 HOURS
8. DK (Don't Know); NA (Not Ascertained)
9. RF (Refused)

MG200: Would it be less than 200 hours, more than 200 hours, or what?

Answer:

1. LESS THAN 200 HOURS
3. ABOUT 200 HOURS
5. MORE THAN 200 HOURS
8. DK (Don't Know); NA (Not Ascertained)
9. RF (Refused)

MG201: Would it be less than 50 hours, more than 50 hours, or what?

Answer:

1. LESS THAN 50 HOURS
3. ABOUT 50 HOURS
5. MORE THAN 50 HOURS
8. DK (Don't Know); NA (Not Ascertained)
9. RF (Refused)

MG032: Who most often helps you with [getting across a room/dressing/bathing/eating/getting (in/out of) bed/using the toilet]?

Answer:

Other Person Number

New Helper

EMPLOYEE OF INSTITUTION

DK (Don't Know); NA (Not Ascertained)

RF (Refused)

MG033: What is that person's relationship to you, or are they an employee of the place you live?

OTHERWISE: What is that person's relationship to you?

Answer:

2. SPOUSE - PARTNER

3. SON

4. STEPSON

5. SPOUSE/PARTNER OF DAUGHTER (SON-IN-LAW)

6. DAUGHTER

7. STEPDAUGHTER

8. SPOUSE/PARTNER OF SON (DAUGHTER-IN-LAW)

9. GRANDCHILD

10. FATHER

11. FATHER OF SPP

12. MOTHER

13. MOTHER OF SPP

14. RPARENTS

15. BROTHER

16. BROTHER IN LAW

17. SISTER

18. SISTER IN LAW

19. OTHER RELATIVE

20. OTHER INDIVIDUAL

21. ORGANIZATION

22. EMPLOYEE OF INSTITUTION

23. PAIDHELPER

- 24. PROFESSIONAL
- 25. PROFESSIONAL (SPECIFY)
- 26. LATE SPOUSE PARTNER
- 27. EX SPOUSE PARTNER
- 28. UNLISTED CHILD OR CHILD-IN-LAW
- 30. FORMER STEP-CHILD
- 31. FORMER CHILD IN LAW
- 33. GRANDCHILD IN LAW
- 90. UNKNOWN CHILD
- 91. UNKNOWN IN LAW

MG035: Does anyone else help you with (this activity/these activities)?

Answer:

- 1. YES
- 5. NO
- 8. DK (Don't Know); NA (Not Ascertained)
- 9. RF (Refused)

MG054: Who most often helps you [prepare meals,/shop for groceries,/make telephone calls,/take medications]?

Answer:

Other Person Number

New Helper

EMPLOYEE OF INSTITUTION

DK (Don't Know); NA (Not Ascertained)

RF (Refused)

MG055: IF R LIVES IN NURSING HOME OR WAS LIVING IN NURSING HOME/HOSPICE WHEN S/HE DIED: What is that person's relationship to you, or are they an employee of the place you live?

OTHERWISE: What is that person's relationship to you?

Answer:

- 1. SELF
- 2. SPOUSE - PARTNER
- 3. SON
- 4. STEPSON
- 5. SPOUSE/PARTNER OF DAUGHTER (SON-IN-LAW)

6. DAUGHTER
7. STEPDAUGHTER
8. SPOUSE/PARTNER OF SON (DAUGHTER-IN-LAW)
9. GRANDCHILD
10. FATHER
11. FATHER OF SPP
12. MOTHER
13. MOTHER OF SPP
14. RPARENTS
15. BROTHER
16. BROTHER IN LAW
17. SISTER
18. SISTER IN LAW
19. OTHER RELATIVE
20. OTHER INDIVIDUAL
21. ORGANIZATION
22. EMPLOYEE OF INSTITUTION
23. PAIDHELPER
24. PROFESSIONAL
25. PROFESSIONAL (SPECIFY)
26. LATE SPOUSE PARTNER
27. EX SPOUSE PARTNER
28. UNLISTED CHILD OR CHILD-IN-LAW
30. FORMER STEP-CHILD
31. FORMER CHILD IN LAW
33. GRANDCHILD IN LAW
90. UNKNOWN CHILD
91. UNKNOWN IN LAW

MG058: Besides any help you have told me about, do you get any help with work around the house or yard because of a health problem?

1. YES
5. NO
8. DK (Don't Know); NA (Not Ascertained)
9. RF (Refused)

MG062: Who most often helps you manage your money?

Answer:

Other Person Number

New Helper

EMPLOYEE OF INSTITUTION

DK (Don't Know); NA (Not Ascertained)

RF (Refused)

MG063: IF R LIVES IN NURSING HOME OR WAS LIVING IN NURSING HOME/HOSPICE WHEN S/HE DIED: What is that person's relationship to you, or are they an employee of the place you live?

OTHERWISE: What is that person's relationship to you?

Answer:

1. SELF
2. SPOUSE - PARTNER
3. SON
4. STEPSON
5. SPOUSE/PARTNER OF DAUGHTER (SON-IN-LAW)
6. DAUGHTER
7. STEPDAUGHTER
8. SPOUSE/PARTNER OF SON (DAUGHTER-IN-LAW)
9. GRANDCHILD
10. FATHER
11. FATHER OF SPP
12. MOTHER
13. MOTHER OF SPP
14. RPARENTS
15. BROTHER
16. BROTHER IN LAW
17. SISTER
18. SISTER IN LAW
19. OTHER RELATIVE
20. OTHER INDIVIDUAL
21. ORGANIZATION
22. EMPLOYEE OF INSTITUTION

- 23. PAIDHELPER
- 24. PROFESSIONAL
- 25. PROFESSIONAL (SPECIFY)
- 26. LATE SPOUSE PARTNER
- 27. EX SPOUSE PARTNER
- 28. UNLISTED CHILD OR CHILD-IN-LAW
- 30. FORMER STEP-CHILD
- 31. FORMER CHILD IN LAW
- 33. GRANDCHILD IN LAW
- 90. UNKNOWN CHILD
- 91. UNKNOWN IN LAW

MG069: HELPER RELATIONSHIP

MG066: HELPER LIST

MIADLNDX: INDEX CONNECTION TO THE IADL TABLE

MMNYNDX: INDEX CONNECTION TO THE MONEY TABLE

MG070: [Let's think for a moment about the help you receive that we just talked about. First,/Next,] the help from [HELPER WHO LOOP]. During the last month, on about how many days did [HELPER WHO LOOP] help you?

ENTER 0 in "days in last month" if the person did not help in the last month

Days in last month:

or

Days per week:

or

Every day:

MG071: ([Let's think for a moment about the help you receive that we just talked about. First,/Next,] the help from [HELPER WHO LOOP]. During the last month, on about how many days did [HELPER WHO LOOP] help you?)

Days per week:

MG072: ([Let's think for a moment about the help you receive that we just talked about. First,/Next,] the help from [HELPER WHO LOOP]. During the last month, on about how many days did [HELPER WHO LOOP] help you?)

Every day:

MG073: On the days [HELPER WHO LOOP] helps you, about how many hours per day is that?

MG074: Affirm sex of helper: (Is [HELPER WHO LOOP] male or female?)

Answer:

1. MALE
2. FEMALE
3. AGENCY/PROFESSIONAL/EMPLOYEE OF 'INSTITUTION'
8. DK (Don't Know); NA (Not Ascertained)
9. RF (Refused)

ME060: Did you [or your husband/wife/partner/] [or your] [late/ husband/ wife/ partner] spend 100 or more hours in total [[since [Previous Wave Month], [PREV WAVE IW YEAR OF FAMILY R]/since [PREV WAVE IW YEAR OF FAMILY R]/in the last two years]] taking care of [grand or great grandchildren/grandchildren]?

Answer:

1. YES
5. NO
8. DK (Don't Know); NA (Not Ascertained)
9. RF (Refused)

ME061: Which of your children is the parent of those grandchildren (or great-grandchildren)

Choose all that apply.

Answer:

- 041-990. Other Person Number
992. DECEASED CHILD
993. ALL CHILDREN
994. ALL GRANDCHILDREN EQUALLY
997. OTHER (Specify)
998. DK (Don't Know); NA (Not Ascertained)
999. RF (Refused)

ME063: Roughly how many hours altogether did you [,yourself,] spend?

ME065: R CARE FOR GRANDCHILD- MIN HOURS

Did it amount to a total of less than _____ , more than _____ , or what?

ME066: R CARE FOR GRANDCHILD- MAX HOURS

ME067: R CARE FOR GRANDCHILD- RESULT

ME068: Roughly how many hours altogether did your [husband/wife/partner] spend?

ME070: SP/P CARE FOR GRANDCHILD- MIN HOURS

Did it amount to a total of less than _____ , more than _____ , or what?

ME071: SP/P CARE FOR GRANDCHILD- MAX HOURS

ME072: SP/P CARE FOR GRANDCHILD- RESULT

MF119: How about another kind of help: Did you [or your] [late/husband/wife/partner] spend a total of 100 or more hours [since [PREV WAVE IW MONTH], [PREV WAVE FIRST R IW YEAR]/in the last two years] helping your [(deceased)/parents/mother/father/mother (and/or her husband)/father (and/or his wife)] with basic personal activities like dressing, eating, and bathing?

Answer:

1. YES
5. NO
8. DK (Don't Know); NA (Not Ascertained)
9. RF (Refused)

MF120M: (Who was helped?) CHOOSE all that apply

Answer:

1. MOTHER (AND/OR HER HUSBAND)
2. FATHER (AND/OR HIS WIFE)
4. MOTHER'S HUSBAND
5. FATHER'S WIFE
8. DK (Don't Know); NA (Not Ascertained)
9. RF (Refused)

MF122: For: your [mother/father/mother's husband/father's wife]

Roughly how many hours did you yourself spend [SINCE PREV WAVE MONTH, YEAR] giving such assistance to your [mother/father/mother's husband/father's wife]?

MF124: R TOT HRS PARENTS PERSONAL NEEDS- MIN

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

MF125: R TOT HRS PARENTS PERSONAL NEEDS- MAX

MF126: R TOT HRS PARENTS PERSONAL NEEDS-RES

MF139: Did you [or your] [late/husband/wife/partner] spend a total of 100 or more hours [since [PREV WAVE IW MONTH], [PREV WAVE FIRST R IW YEAR]/in the last two years] helping your [(deceased) /parents/mother/father/mother (and/or her husband)/father (and/or his wife)] with other things such as household chores, errands, transportation, etc.?

Answer:

1. YES
5. NO
8. DK (Don't Know); NA (Not Ascertained)
9. RF (Refused)

MF140: (Who was helped?)

CHOOSE all that apply

1. MOTHER (AND/OR HER HUSBAND)
2. FATHER (AND/OR HIS WIFE)
3. PARENTS
8. DK (Don't Know); NA (Not Ascertained)
9. RF (Refused)

MF142: For: your [Mother (and/or her husband)/Mother/Father (and/or his wife)/Father/Parents]

Roughly how many hours [[since [PREV WAVE FIRST R IW MO], [PREV WAVE FIRST R IW YEAR]/since [PREV WAVE FIRST R IW YEAR]/in the last two years]] did you yourself spend giving such assistance?

MF144: R TOTAL HOURS PARENT ERRANDS-MIN

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

MF145: R TOTAL HOURS PARENT ERRANDS-MAX

MF146: R TOTAL HOURS PARENT ERRANDS- RESULT

MG015: Does anyone ever help you dress?

Answer:

1. YES
5. NO
8. DK (Don't Know); NA (Not Ascertained)
9. RF (Refused)

MG020: Does anyone ever help you get across a room?

Answer:

1. YES
5. NO
8. DK (Don't Know); NA (Not Ascertained)
9. RF (Refused)

MG022: Does anyone ever help you bathe?

Answer:

1. YES
5. NO
8. DK (Don't Know); NA (Not Ascertained)
9. RF (Refused)

MG024: Does anyone ever help you eat?

Answer:

1. YES
5. NO
8. DK (Don't Know); NA (Not Ascertained)
9. RF (Refused)

MG029: Does anyone ever help you get in or out of bed?

Answer:

1. YES

- 5. NO
- 8. DK (Don't Know); NA (Not Ascertained)
- 9. RF (Refused)

MG031: Does anyone ever help you use the toilet?

Answer:

- 1. YES
- 5. NO
- 8. DK (Don't Know); NA (Not Ascertained)
- 9. RF (Refused)

MG043: Does anyone help you prepare hot meals?

Answer:

- 1. YES
- 5. NO
- 8. DK (Don't Know); NA (Not Ascertained)
- 9. RF (Refused)

MG046: Does anyone help you shop for groceries?

Answer:

- 1. YES
- 5. NO
- 8. DK (Don't Know); NA (Not Ascertained)
- 9. RF (Refused)

MG049: Does anyone help you make telephone calls?

Answer:

- 1. YES
- 5. NO
- 8. DK (Don't Know); NA (Not Ascertained)
- 9. RF (Refused)

MG053: Does anyone help you with taking medications?

Answer:

- 1. YES

5. NO

8. DK (Don't Know); NA (Not Ascertained)

9. RF (Refused)

MG061: Does anyone ever help you manage your money?

Answer:

1. YES

5. NO

8. DK (Don't Know); NA (Not Ascertained)

9. RF (Refused)

4.8.2 ELSA

HEHPA. Thinking about the activities that [^you have / [^name] has] problems with, does anyone ever help [^you / him / her] with these activities (including [^your / his / her] partner or other people in [^your / his / her] household)?

1 Yes

2 No

HEHPH . Who, if anyone, helps ^youname[PNum] with ^moving?

INTERVIEWER: Does anyone else help ^himher[PNum] with these activities?

Code all that apply.

1 Husband or wife or partner

2 Son

3 Daughter

4 Sister

5 Brother

6 Other relative

7 Privately paid help

8 Local authority/social services helper e.g. home care worker

9 Nurse, e.g. health visitor or district nurse

10 Member of staff at the care/nursing home

11 Friend or neighbour

95 Other person

96 Does not get any help

[Multiple responses to HEHPH are recorded in variables: hehphsp hehphso hehphda hehphsi hehphbr hehphor hehphpp hehphla hehphnu hehphst hehphfr hehphot hehph96]

HEHPW. Who helps [^you / [^name]] with [^getting dressed / bathing or showering / dressing and bathing or showering]?

01 Husband or wife or partner

02 Son

03 Daughter

04 Sister

05 Brother

- 06 Other relative
- 07 Privately paid employee
- 08 Local authority/social services helper e.g. home care worker
- 09 Nurse, e.g. health visitor or district nurse
- 10 Member of staff at the care/nursing home
- 11 Friend or neighbour
- 95 Other person
- 96 ^[Do you/ does name] not get any help

[Multiple responses to HEHPW are recorded in variables: hehpwsp hehpwso hehpwda hehpwsi hehpwbr hehpwor hehpwpp hehpwla hehpwnu hehpwst hehpwfr hehpwot hehpw96]

HEHPD . Who helps [^you / [^name]] with [^eating (such as cutting up your food) and preparing a hot meal/ eating (such as cutting up your food)/preparing a hot meal]?

- 01 Husband or wife or partner
- 02 Son
- 03 Daughter
- 04 Sister
- 05 Brother
- 06 Other relative
- 07 Privately paid employee
- 08 Local authority/social services helper e.g. home care worker
- 09 Nurse, e.g. health visitor or district nurse
- 10 Member of staff at the care/nursing home
- 11 Friend or neighbour
- 95 Other person
- 96 ^[Do you/ does name] not get any help

[Multiple responses to HEHPD are recorded in variables: hehpdsp hehpdso hehpdda hehpdsi hehpdbr hehpdor hehpdpp hehpdla hehpdnu hehpdst hehpdfr hehpdot hehpd96]

HEHPP. Who helps [^you / [^name]] with [^shopping for groceries and doing work around the house or garden/ shopping for groceries/doing work around the house or garden]?

- 01 Husband or wife or partner
- 02 Son
- 03 Daughter

- 04 Sister
- 05 Brother
- 06 Other relative
- 07 Privately paid employee
- 08 Local authority/social services helper e.g. home care worker
- 09 Nurse, e.g. health visitor or district nurse
- 10 Member of staff at the care/nursing home
- 11 Friend or neighbour
- 95 Other person
- 96 ^[Do you/ does name] not get any help

[Multiple responses to HEHPP are recorded in variables:

hehppsp hehppso hehppda hehppsi, hehppbr hehppor hehpppp hehppla hehppnu hehppst hehppfr hehppot
hehpp96]

HEHPT. Who helps [^you / [^name]] with [^making telephone calls and managing money (such as paying bills and keeping track of expenses)/making telephone calls/ managing money (such as paying bills and keeping track of expenses)]?

- 01 Husband or wife or partner
- 02 Son
- 03 Daughter
- 04 Sister
- 05 Brother
- 06 Other relative
- 07 Privately paid employee
- 08 Local authority/social services helper e.g. home care worker
- 09 Nurse, e.g. health visitor or district nurse
- 10 Member of staff at the care/nursing home
- 11 Friend or neighbour
- 95 Other person
- 96 ^[Do you/ does name] not get any help

[Multiple responses to HEHPT are recorded in variables: hehptsp hehptso hehptda hehptsi hehptbr hehptor
hehptpp hehptla hehptnu hehptst hehptfr hehptot hehpt96]

HEHPM. Who helps [^you / [^name]] with taking medication?

- 01 Husband or wife or partner
- 02 Son
- 03 Daughter
- 04 Sister
- 05 Brother
- 06 Other relative
- 07 Privately paid employee
- 08 Local authority/social services helper e.g. home care worker
- 09 Nurse, e.g. health visitor or district nurse
- 10 Member of staff at the care/nursing home
- 11 Friend or neighbour
- 95 Other person
- 96 ^[Do you/ does name] not get any help

[Multiple responses to HEHPM are recorded in variables: hehpm sp hehpmso hehpm da, hehpm si hehpm br hehpm or hehpm pp hehpm la hehpm nu hehpm st hehpm fr hehpm ot hehpm 96]

HEHPB. Who helps [^you / [^name]] with these (other) activities?

INTERVIEWER: PROBE - 'Does anyone else help [^you / him / her] with these activities?' Code all that apply.

- 01 Husband or wife or partner
- 02 Son
- 03 Daughter
- 04 Sister
- 05 Brother
- 06 Other relative
- 07 Privately paid employee
- 08 Local authority/social services helper e.g. home care worker
- 09 Nurse, e.g. health visitor or district nurse
- 10 Member of staff at the care/nursing home
- 11 Friend or neighbour
- 95 Other person
- 96 ^[Do you/ does name] not get any help

[Multiple responses to HEHPB are recorded in variables: hehpb sp hehpbso hehpb da hehpb si hehpb br hehpb or hehpb pp hehpb la hehpb nu hehpb st hehpb fr hehpb ot hehpb 96]

HEHPC. Would you say that the help [^you / he / she] receive...

4 or less often?

5 One-off activity

ERCAA. Did you look after anyone in the past week (including your partner or other people in your household)?

BY 'LOOK AFTER' WE MEAN THE ACTIVE PROVISION OF CARE

1 Yes

2 No

ERCAB. What relation is this person or people to you?

CODE ALL THAT APPLY

1 Spouse or partner

2 Child

3 Grandchild

4 Parent

5 Parent in law

6 Other relative

7 Friend or neighbour

95 other

[Multiple responses to HEHPB are recoded in variables: ercabsp ercabch ercabgc ercabpa ercabpl ercabor ercabfr ercabot]

ERCAX. INTERVIEWER: Enter details of other person(s) who they cared for.

[Open responses to ERCAX are coded and merged with the multiple responses to ERCAB These merged responses are recoded in variables: ercamsp ercamch ercamgc ercampa ercampl ercamor ercamfr ercam85 ercam86]

ERCABNum. How many did you look after in the past week?

[Responses for each type of person recoded in variables: Ercansp ercanch ercangc ercanpa ercanpl ercanor ercanfr ercanot ercantt]

ERCALIVE. [^Does the person/Do any of the people] you care for live with you?

1 Yes

2 No

ERCADPN. INTERVIEWER: Enter the person number of each person who was cared for.

CODE ALL THAT APPLY.

01 [^Name of person living in the household- [01]]

- 02 [^Name of person living in the household- [02]]
- 03 [^Name of person living in the household- [03]]
- 04 [^Name of person living in the household- [04]]
- 05 [^Name of person living in the household- [05]]
- 06 [^Name of person living in the household- [06]]
- 07 [^Name of person living in the household- [07]]
- 08 [^Name of person living in the household- [08]]
- 09 [^Name of person living in the household- [09]]
- 10 [^Name of person living in the household- [10]]
- 11 [^Name of person living in the household- [11]]
- 12 [^Name of person living in the household- [12]]
- 13 [^Name of person living in the household- [13]]
- 14 [^Name of person living in the household- [14]]
- 15 [^Name of person living in the household- [15]]
- 16 [^Name of person living in the household- [16]]

[Multiple responses to ercadbpn are recorded in variables ercadp1 ercadp2 ercadp3 ercadp4 ercadp5 ercadp6 ercadp7 ercadp8 ercadp9 ercadp10 ercadp11 ercadp12 ercadp13 ercadp14 ercadp15 ercadp16]

ERCAC. How many hours in the past week did you do this? INTERVIEWER: If 'all the time', enter 168.

Range: 0..168

ERMOTIVA. For which of the reasons given on this card, if any, did you care for someone last week?

CODE ALL THAT APPLY.

- 01 To meet other people
- 02 To contribute something useful
- 03 For personal achievement
- 04 Because I am needed
- 05 To earn money
- 06 Because I enjoy it
- 07 To use my skills
- 08 To keep fit
- 09 Because I feel obligated to do it
- 96 None of these

ERResCk. May I check, is there anyone (living with ^[you/name] /not living with ^[you/name]) who is sick, disabled or frail whom look after or give special help to, other than in a professional capacity (for example, a sick or disabled (or elderly) relative/husband/wife/child/friend/parent, etc)?

INTERVIEWER: Code no if gives financial help only

1 Yes

2 No

ERResBk. If ^[you/name] wanted a break for a few hours (during the time ^[you/he/she] would usually look after him/her) would someone else have to look after him/her?

1 Yes, someone else needed

2 No

ERResRy. Is there anyone whom you could rely on to look after him/her either at home or elsewhere?

1 Yes

2 No

ERCARA. Considering all the efforts that I have put into caring for someone, I am fully satisfied with what I have gained so far.

(Would you say that you strongly agree, agree, disagree or strongly disagree?)

1 Strongly agree

2 Agree

3 Disagree

4 Strongly disagree

ERCARB. Considering all the efforts that I have put into caring for someone, I have always received adequate appreciation from others.

(Would you say that you strongly agree, agree, disagree or strongly disagree?)

1 Strongly agree

2 Agree

3 Disagree

4 Strongly disagree

RSCARE. Have you ever provided long-term care to a disabled or impaired relative or friend?

1 Yes 2 No

RSCAREY. How old were you when it first happened?

SPCAA. Did you look after anyone in the past week (including your partner or other people in your household)?

BY 'LOOK AFTER' WE MEAN THE ACTIVE PROVISION OF CARE

1 Yes

2 No

SPCAB. What relation is this person or people to you?

CODE ALL THAT APPLY

1 Spouse or partner

2 Child

3 Grandchild

4 Parent

5 Parent in law

6 Other relative

7 Friend or neighbour

95 other

SPCAC. How many hours in the past week did you do this?

ENTER NUMBER OF HOURS

IF 'ALL THE TIME', ENTER 168

4.8.3 SHARE

SP002_ HelpFrom. Thinking about the last twelve months has any family member from outside the household, any friend or neighbour given you [or/or/or/or/{empty}/{empty}] [your/your/your/your/{empty}/{empty}] [husband/wife/partner/partner/{empty}/{empty}] personal care or practical household help?

1. Yes

5. No

SP003_ FromWhoHelp. Which [{empty}/other] family member from outside the household, friend or neighbour has helped you [or/or/or/or/{empty}/{empty}] [your/your/your/your/{empty}/{empty}]

[husband/wife/partner/partner/{empty}/{empty}] [most often/{empty}] in the last twelve months?

[n]If the person cited is a network member (i.e. was mentioned during the SN module) and has other roles as well (e.g. child, neighbor, etc.), code the answer as network member (i.e., the number next to his/her name).[/n]

{list with relations}

SP004_ WHICH TYPES OF HELP. Which types of help has this person provided in [the time since the last interview/the last twelve months]?

IWER:CODE ALL THAT APPLY. QUESTION DOES NOT INCLUDE LOOKING AFTER GRANDCHILDREN; THIS IS ASKED LATER IN SP014

1. personal care, e.g. dressing, bathing or showering, eating, getting in or out of bed, using the toilet
2. practical household help, e.g. with home repairs, gardening, transportation, shopping, household chores
3. help with paperwork, such as filling out forms, settling financial or legal matters

SP005_ HowOftenHelpRec. HOW OFTEN RECEIVED HELP FROM THIS PERSON

In the last twelve months, how often altogether have you [or/or/or/or/{empty}/{empty}]

[your/your/your/your/{empty}/{empty}] [husband/wife/partner/partner/{empty}/{empty}] received such help from this person? Was it...

READ OUT

1. Almost daily
2. Almost every week
3. Almost every month
4. Less often

SP007_ OtherHelper. ANY OTHER HELPER FROM OUTSIDE THE HOUSEHOLD

Is there any other family member from outside the household, friend or neighbour who has given you [or/or/or/or/{empty}/{empty}][your/your/your/your/{empty}/{empty}][husband/wife/partner/partner/{empty}/{empty}] personal care or practical household help?

1. Yes

5. No

SP008_GiveHelp. GIVEN HELP LAST TWELVE MONTHS

Now I would like to ask you about the help you have given to others. In the last twelve months, have you personally given personal care or practical household help to a family member living outside your household, a friend or neighbour?

1. Yes

5. No

SP009_ToWhomGiveHelp. TO WHOM DID YOU GIVE HELP

Which[empty]/other family member from outside the household, friend or neighbour have you given personal care or practical household help in the last twelve months? [n]If the person cited is a network member (i.e. was mentioned during the SN module) and has other roles as well (e.g. child, neighbor, etc.), code the answer as network member (i.e., the number next to his/her name).[/n]

{list with relations}

SP010_TYPES OF HELP GIVEN. Please look at card 38. Which types of help have you given to this person in [the time since the last interview/the last twelve months]?

IWER: CODE ALL THAT APPLY. QUESTION DOES NOT INCLUDE LOOKING AFTER GRANDCHILDREN; THIS IS ASKED LATER IN SP014

1. personal care, e.g. dressing, bathing or showering, eating, getting in or out of bed, using the toilet
2. practical household help, e.g. with home repairs, gardening, transportation, shopping, household chores
3. help with paperwork, such as filling out forms, settling financial or legal matters

SP011_HowOfGiveHelp. HOW OFTEN GIVE HELP

In the last twelve months, how often altogether have you given personal care or practical household help to this person? Was it...

Read out

1. Almost daily
2. Almost every week
3. Almost every month
4. Less often

SP012_HOURS GIVEN HELP. About how many hours altogether did you give such help [on a typical day/in a typical week/in a typical month/in the last twelve months]?

IWER: ROUND UP TO FULL HOURS

_____ (0..3000)

SP013_GiveHelpToOth. HAVE YOU GIVEN HELP TO OTHERS

Is there any other family member from outside the household, friend, or neighbor to whom you have given personal care or practical household help?

1. Yes
5. No

SP014_LkAftGrCh. LOOK AFTER GRANDCHILDREN

During the last twelve months, have you regularly or occasionally looked after [your grandchild/your grandchildren] without the presence of the parents?

1. Yes
5. No

SP015_ParentLkAftGrChild. PARENTS FROM GRANDCHILDREN

From which of your children [is/are] [the grandchild/the grandchildren] you have looked after?

Code all that apply
{list with children}

SP016_HowOftGrCh. HOW OFTEN DO YOU LOOK AFTER GRANDCHILDREN

On average, how often did you look after the child(ren) of [FLChildName[i]] [in the time since the last twelve months? Was it...

Read out

1. Almost daily
2. Almost every week
3. Almost every month
4. Less often

SP017_ HOURS OOKING AFTER GRANDCHILDREN. About how many hours did you look after the child(ren) of [FLChild[i]] [on a typical day/in a typical week/in a typical month/in the last twelve months]?

IWER: ROUND UP TO FULL HOURS

_____ (0..3000)

SP018_GiveHelpInHH. GIVEN HELP TO SOMEONE IN THE HOUSEHOLD

Let us now talk about help within your household. Is there someone living in this household whom you have helped regularly during the last twelve months with personal care, such as washing, getting out of bed, or dressing?

By regularly we mean daily or almost daily during at least three months. We do not want to capture help during

short-term sickness of family members.

1. Yes

5. No

SP019_ToWhomGiveHelpInHH. TO WHOM GIVEN HELP IN THIS HOUSEHOLD

Who is that?

Code all that apply[n]If the person cited is a network member (i.e. was mentioned during the SN module) and has other roles as well (e.g. child, neighbor, etc.), code the answer as network member (i.e., the number next to his/her name).[/n]

{list with relations}

SP020_RecHelpPersCareInHH. SOMEONE IN THIS HOUSEHOLD HELPED YOU REGULARLY WITH PERSONAL CARE

And is there someone living in this household who has helped you regularly during the last twelve months with personal care, such as washing, getting out of bed, or dressing?

By regularly we mean daily or almost daily during at least three months. We do not want to capture help during short-term sickness of family members.

1. Yes

5. No

SP021_FromWhomHelpInHH. WHO HELPS YOU WITH PERSONAL CARE IN THE HOUSEHOLD

Who is that?

Code all that apply[n]If the person cited is a network member (i.e. was mentioned during the SN module) and has other roles as well (e.g. child, neighbor, etc.), code the answer as network member (i.e., the number next to his/her name).[/n]

{list with relations}

SP023_NameOthChild. (WHO GAVE YOU HELP)

Record child's name

SP024_NameOthChild. (TO WHOM DID YOU GIVE HELP)

Record child's name

SP025_NameOthChild. (TO WHOM GIVEN HELP IN THIS HOUSEHOLD)

Record child's name

SP026_NameOthChild. (WHO HELPS YOU WITH PERSONAL CARE IN THE HOUSEHOLD)

Record child's name

PH050_ HELP ACTIVITIES. Thinking about the activities that you have problems with, does anyone ever help you with these activities?

IWER: INCLUDING YOUR PARTNER OR OTHER PEOPLE IN YOUR HOUSEHOLD

1. Yes

5. No

PH051_ HELP MEETS NEEDS. Would you say that the help you receive meets your needs?

IWER: READ OUT

1. All the time

2. Usually

3. Sometimes

4. Hardly ever

4.8.4 KLoSA

Ba069. Did you take care of any of those grandchildren before he/she reached the age of 10?

[IWER: Please enter '1 Yes' if R took care of a grandchild under the age of 10, even in case the grandchild is now aged 10 or over.]

1 Yes

5 No

Ba071. If so, how many grandchildren did you take care of? [unit: number of grandchildren] [range:1~10]

[IWER: It is possible to enter a maximum of ten grandchildren R took care of. If the number exceeds 10, R is asked to choose the ten he/she helped most to take care of.]

Ba072. Whose child is [grandchild's name in Ba071]?

[IWER: In case of grandchildren whose parent is dead or missing, enter '11 Others'.]

1~10 Children list (living children)

11 Others (missing or dead children)

Ba073. How long did you take care of [grandchild's name in Ba071]? (unit: a year) year [range:0~9]

[IWER:

- If the period of taking care of a grandchild is less than 1 year, enter 0.

- It is possible to enter a maximum of 9 grandchildren because any grandchild taken care of before the age of 10 can be included.]

Ba074. On average how many hours per week did you care for [grandchild's name in Ba071] during that period? (unit: an average hour per week)

[IWER: If R took care of two or more grandchildren at the same time, R is advised to answer separately for each grandchild not to double-count care hours. For example, if R cared for two grandchildren for 10 hours, enter 5 hours for each.]

Average hours per week [range:1~168]

Ba075. Did you take care of any of your grandchildren under the age of 10 during the past one year? (not calendar year)

1 Yes

5 No

Ba076. How many grandchildren did you take care of during the past one year?

[IWER: It is possible to enter a maximum of five grandchildren R took care of. If the number exceeds 5, R is asked to choose the five he/she helped most to take care of.]

[range:1~5]

Ba077. What is the name of the grandchild you took care of? (Please start with the eldest, in birth order)

[IWER: If R does not provide the grandchild's name, describe him/her as 'the first grandchild of the first daughter', 'the first grandchild of the second son', etc.]

Ba078. Whose child is [grandchild's name in Ba077]?

[IWER: In case of grandchildren whose parent is dead or missing, enter '11 Others'.]

1~10 Children list (living children)

11 Others (missing or dead children)

Ba079. How long did you take care of [grandchild's name in Ba077] during the past one year?

[IWER: Calculate 1 month as 4 weeks, 6 months as 26 weeks, 1 year as 52 weeks. Past one year means a period of one year prior to now, not 2007.]

weeks [range:1~52]

Ba080. On average how many hours per week did you spend on caring for [grandchild's name in Ba077] during the past one year? (unit: average number of hours per week)

[IWER:

- Past one year means a period of one year prior to now, not 2007.

- If R took care of two or more grandchildren at the same time, R is advised to answer separately for each grandchild not to double-count care hours. For example, if R cared for two grandchildren for 10 hours, enter 5 hours for each.]

Average hours per week [range:1~168]

Bb170. Did you care for any of [names listed in Bb169] during the past one year (not calendar year)? If so, whom did you help? Please choose all family members you cared for. (Select multiple responses.)

② Spouse

③ Mother

④ Father

⑤ Mother-in-law

⑥ Father-in-law

⑦ ~ ⑳ Children

㉗ ~ ㉟ Sibling

④⑦ Brother-in-law/sister-in-law

④⑧ Son-in-law/sister-in-law

④⑨ Grandchild

⑤⑩ Other relatives

(53) Did not help (They were helped by other helpers, etc.)

Bb171. Roughly how many hours per week did you care for [name chosen in Bb170] during the past one year (not calendar year)?

___ hours per week [range:1~168]

Bb172. How many weeks did you care for [name chosen in Bb170] during the past one year?

[IWER: Calculate 1 month as 4 weeks, 6 months as 26 weeks, 1 year as 52 weeks. For example, 5 months is converted into 20 weeks, and enter 30 weeks for 7 months because it is equal to 6 months (26 weeks) plus 1 month (4 weeks). Past one year refers to a period of one year prior to now, not 2009.]

weeks [range:1~52]

Bb173. Did you help any of your family members over the age of 10 (spouse, parents, parents-in-law, siblings and/or children) who are not living with you with the various activities he/she is unable to do due to physical or mental weakness (e.g. personal grooming, cleaning and tidying up the house, making bed and washing dishes, etc., preparing meals, doing laundry, going out a short distance, using transportation, shopping, managing money, making and taking phone calls, and taking medications) during the past one year? If you did, whom did you help?

Please choose all family members you helped. (Select multiple responses.)

③ Mother

④ Father

⑤ Mother-in-law

⑥ Father-in-law

⑦ ~ ⑳ Children

㉑ ~ ㉔ Sibling

④⑦ Brother-in-law/sister-in-law

④⑧ Son-in-law/daughter-in-law

④⑨ Grandchild

⑤⑩ Other relatives

(54) None →Go to Bb176

Bb174. Roughly how many hours per week did you help out [name chosen in Bb173] during the past one year (not calendar year)?

___ hours per week [range:1~168]

Bb175. How many weeks did you care for [name chosen in Bb173] during the past one year?

[IWER: Calculate 1 month as 4 weeks, 6 months as 26 weeks, 1 year as 52 weeks. For example, 5 months is converted into 20 weeks, and enter 30 weeks for 7 months because it is equal to 6 months (26 weeks) plus 1 month (4 weeks). Past one year refers to a period of one year prior to now, not 2009.]

C218. If you need help with activities of daily living, name the five people who help you the most in order. Who is the person that comes [1st/2nd/...] in helping you? Please state the person's name or relationship with you.

- ② Spouse
- ③ Mother
- ④ Father
- ⑤ Mother-in-law
- ⑥ Father-in-law
- ⑦ ~ ⑳ Children
- ㉑ ~ ㉔ Sibling
- ㉕ Brother-in-law/sister-in-law
- ㉖ Son-in-law/sister-in-law
- ㉗ Grandchild
- ㉘ Other relatives
- (52) Voluntary worker
- (53) Publicly provided helper
- (54) Personally hired helper
- (55) Helper or other non-relatives
- (56) No one helped →Go to C223

C219. How many days did [name selected in C218] help you during the past one month?

___ days [range:1~31]

C220. How many hours per day does [name selected in C218] usually help you?

[IWER: less than an hour=1]

___ hours [range:1~24]

C221. Is [name selected in C218] paid to help you?

1 Yes

5 No

C224. Who is likely to help you if you need help with activities of daily living, such as eating, dressing, or using the bathroom, over a long period of time in the future? Please select all that apply.

1 Spouse

2 Parents

3 Son

4 Daughter

5 Son-in-law/daughter-in-law 6 Sibling

7 Grandchildren

8 Others

9 Voluntary worker

10 Publicly provided helper

11 Personally hired helper

12 No helper

{Wave 1 specific variables}

Cb22. Who second most often helps you with (dressing, washing, bathing, eating, getting out of bed, using toilet, controlling urination and defecation, grooming, cooking, doing laundry, running errands, using public transportation, shopping, managing money, making phone calls, and taking medicine)?

(Select from the list displayed by CAPI)

[2] Spouse

[3] Mother

[4] Father

[5] Mother-in-law

[6] Father-in-law

[7 ~ 26] Children

[27 ~ 46] Sibling

[47] Brother-in-law, sister-in-law

[48] Spouse of child

[49] Grandchild

[50] Other relative

[55] Helper or other non-relative

[57] No one else helped

Cb23. During the last month, on about how many days did helper's name chosen from Cb22 help you?

_____ days (range: 1~31)

Cb24. On the days helper's name chosen from Cb22 helps you, about how many hours per day is that?

IWER: less than an hour=1

_____ hours (range: 1~24)

Cb25. Is helper's name chosen from Cb22 paid to help you?

[1] Yes [5] No

Cb26. Is there any other person helped you? If so, who most often helps you next? (Select from the list displayed by CAPI)

[2] Spouse

[3] Mother

[4] Father

[5] Mother-in-law

[6] Father-in-law

[7~26] Children

[27~46] Sibling

[47] Brother-in-law, sister-in-law

[48] Spouse of child

[49] Grandchild

[50] Other relative

[55] Helper or other non-relative

[58] No one else helped

Cb27. During the last month, on about how many days did helper's name chosen from Cb26 help you?

_____ days (range: 1~31)

Cb28. On the days helper's name chosen from Cb26 helps you, about how many hours per day is that?

IWER: less than an hour=1

_____ hours (range: 1~24)

Cb29. Is helper's name chosen from Cb26 paid to help you?

[1] Yes [5] No

4.8.5 LASI

FS408. [Ask only if respondent indicates there are members of his or her family who are unable to carry out basic daily activities in the previous question, FS407=1] Do you take care of any of your family who are unable to carry out their basic daily activities?

Answer:

1. Yes
2. No

FS408a. [Ask only if respondent indicates he or she takes care of any family members] How often do you take care of your family?

1. Daily
2. Several times a week
3. Once a week
4. Several times a month
5. At least once a month
6. Not in the last month

FS409. [Ask only if respondent indicates he or she takes care of any family members] For how many hours did you provide such care during the past week? If it is easier you may give the response in hours per day or hours per month.

_____ hours per week/day/month

HT407. Does anyone ever help you with these difficulties you mentioned above?

1. Yes
2. No

HT407_helpers. How many people usually help you with these activities?

HT408a. Who helps you with that most often?

Select person if helper is a household roster

[CAPI will display HH roster]

_____ Name if helper is not a household member

HT409a [Ask if name of helper is not on the household roster in HT408a]. What is that person's relationship to you?

1. Spouse or partner
2. Son (biologic, in-law, or step son)
3. Daughter (biologic, in-law, or step daughter)
4. Grandchild
5. Father
6. Father of spouse or partner
7. Mother
8. Mother of spouse or partner
9. Brother
10. Brother-in-law
11. Sister
12. Sister-in-law
13. Other relative
14. Non-professional, paid helper
15. Professional (paid or non-paid)
16. Ex spouse or partner
17. Other, please specify: _____

HT410a. During the last month, on about how many days did [NAME OF CARE PROVIDER] assist you?

_____ days in last month (range: 1-31)

HT411a. On the days [NAME OF CARE PROVIDER] assisted you, about how many hours per day was that?

LESS THAN ONE HOUR = 1

_____ hours (range: 1-24)

FS226. [Ask only if respondent has grandchildren] Do you look after any of these grandchildren?

1. Yes
2. No

FS227. [Ask only if respondent looks after grandchildren] How many hours per week do you care for your grandchildren on average?

_____ hours per week

4.8.6 CHARLS

CF001. Did you spend any time taking care of your grandchildren last year? 过去一年，您或您配偶是否花时间照看了您的孙子/孙女？

(1) Yes 是

(2) No否→ Skip to CF004 请跳至CF004

CF002. For which child's children did you provide care? 您或您配偶照看哪一个子女的孩子？

[IWER: Please list all the children including co-resident ones, and add a choice "deceased children" inCAPI list.

Select from list displayed by CAPI (child's name) 访员注意：请列出所有人，包括在一起住的孩子和去世的子女名单，从孩子名单中选出]

[PROCEDURE: Repeat question CF003according to the list of names in CF002 . 程序: 根据在CF002 名单重复问CF003]

CF003. Approximately how many weeks and how many hours per week did you spend last year taking care of this child's children? 过去一年，您和您配偶大约花几周，每周花多少时间来照看这个子女的孩子？

Myself 我____(CF003_1)weeks周；_____(CF003_2)0.00..168.00hours per week小时/周

My spouse 我爱人____ (CF003_3) weeks周；____ (CF003_4) 0.00..168.00hours per week小时/周

[IWER: Mark '1' if the period is less than 7 days. 访员注意：如果小于7天填写“1”]

CF004. Did you or your spouse take care of your parents or parents-in-law during the last year in assisting them in their daily activities or other activities (e.g., household chores, meal preparation, laundry, going out, grocery shopping, financial management, etc.)? 过去一年，您或您配偶有没有在日常活动（或其他活动）方面给您父母或您配偶的父母提供帮助（例如家务劳动，做饭，洗衣，外出，购物和财务管理）？

(1) Yes 是

(2) No否→ Skip to CG001请跳至CG001

CF005. Approximately how many weeks and how many hours per week did you yourself spend last year taking care of your parents or parents-in-law? 过去一年，您自己大约花几周，每周花多少时间来照看您的父母和岳父母（或公公婆婆）？

(1) Your father 您父亲 ____ (CF005_1)weeks周；____ (CF005_2)0.00..168.00hours per week小时/周

(2) Your mother 您母亲 ____ (CF005_3)weeks周；____ (CF005_4)0.00..168.00hours per week小时/周

(3) Your father-in-law 您的岳父（或公公） ____ (CF005_5)weeks周；____ (CF005_6)0.00..168.00hours per week小时/周

(4) Your mother-in-law 您的岳母 (或婆婆) ____ (CF005_7)weeks周; ____ (CF005_8)0.00..168.00hours per week小时/周

[Softcheck: if (1) is checked in CF004 and 0 or missings are reported in CF005.如果CF004 =1,而且CF005 =0或答案缺失]

[Softcheck: if more than 52 weeks are reported or more than 140 hours are reported. 如果答案大于52周或者大于140小时]

CF006. Approximately how many weeks and how many hours per week did your spouse spend last year taking care of your parents or parents-in-law?过去一年, 您自己大约花几周, 每周花多少时间来照看您的父母和岳父母 (或公公婆婆) ?

(1) Your father 您父亲 ____ (CF006_1)weeks周; ____ (CF006_2)0.00..168.00hours per week小时/周

(2) Your mother 您母亲 ____ (CF006_3)weeks周; ____ (CF006_4)0.00..168.00hours per week小时/周

(3) Your father-in-law 您的岳父 (或公公) ____ (CF006_5)weeks周; ____ (CF006_6)0.00..168.00hours per week小时/周

(4) Your mother-in-law 您的岳母 (或婆婆) ____ (CF006_7)weeks周; ____ (CF006_8)0.00..168.00hours per week小时/周

[Softcheck: if (1) is checked in CF004 and 0 or missings are reported in CF006.如果CF004 =1,而且CF006 =0或答案缺失]

[Softcheck: if more than 52 weeks are reported or more than 140 hours are reported. 如果答案大于52周或者大于140小时]

DA056. Have you done any of these activities in the last month? (Code all that apply)

- (1) Interacted with friends
- (2) Played Ma-jong, played chess, played cards, or went to community club
- (3) Provided help to family, friends, or neighbors who do not live with you and who did not pay you for help
- (4) Went to a sport, social, or other kind of club
- (5) Took part in a community-related organization
- (6) Done voluntary or charity work
- (7) Cared for a sick or disabled adult who does not live with you and who did not pay you for help
- (8) Attended an educational or training course
- (9) Stock investment
- (10) Used the internet
- (11) other
- (12) None of these

DA057. Frequency of activity in the last month

How often in the last month [did/have][you] [do voluntary or charity work/ cared for a sick or disabled adult/ provided help to family, friends or neighbors/attended an educational or training course/ interacted with friends/ go to a sport, social, or other kind of club/ taken part in a community-related organization]? Almost daily, almost every week, or not regularly?

- (1) Almost daily
- (2) Almost every week
- (3) Not regularly

DB022. Who most often helps you with [make sure we ask this only once for ALL these activities; do not ask for each problem separately] (dressing, bathing, eating, getting out of bed, using the toilet, controlling urination and defecation, doing chores, preparing hot meals, shopping, managing money, making phone calls, taking medications) (May choose up to 3 persons)? 请问在以上困难中，谁帮助您最多(最多可选择3个)? (在穿衣、洗澡、吃饭、起床、入厕、控制大小便、家务、做饭、购物、管理钱物、打电话，吃药等困难中)
(Select from the list displayed by CAPI) (请从CAPI列表中选择)

- 1 Spouse 配偶
- 2 Mother 母亲
- 3 Father 父亲
- 4 Mother-in-law 岳母/婆婆
- 5 Father-in-law 岳父/公公
- 6 ~ 30 Children 子女
- 31 Sibling 兄弟姐妹
- 32 Sibling of spouse 配偶的兄弟姐妹
- 33 Brother-in-law, sister-in-law 姐夫/妹夫/嫂子/弟媳
- 34 Spouse of child 孩子的配偶
- 35 Grandchild 孙子女
- 36 Other relative 其他亲属
- 37 Paid helper(such as nanny) 雇佣人员 (如：保姆)
- 38 Volunteer or Employee of facility 志愿者或者志愿机构人员
- 39 Other 其他人员
- 40 No one helped 没有人提供帮助 →Skip to DB029请跳至 DB029

PROCEDURE: For each helper 6-30or 34chosen in DB022, ask DB022_a. 如果DB022 选择6-30或34 (即子女或孩子配偶提供帮助最多)，对每一个人询问DB022_a

DB022_a. Whether it is the [helper's name chosen from DB022] him/herself taking the time? [DB022选择的帮助者]亲自帮助您的吗？

- (1) Yes 是
- (2) No 否

DB023. During the last month, on about how many days did [helper's name chosen from DB022] help you?
在过去一个月内, [DB022 中选择的帮助者]帮助您了多少天? _____ 1..31Days天

DB024. On the days [helper's name chosen from DB022] helps you, about how many hours per day is that?
在[DB022 中选择的帮助者]帮助您的那些天, 他/她大概每天花多少小时帮助您? _____ 1..24Hours 小时
[IWER: less than an hour=1 访员注意: 少于一个小时请记为1]

DB025. Is he/she living in your home?

- (3) Yes
- (4) No

DB026. Is [helper's name chosen from DB022] paid to help you?

- (1) Yes
- (2) No

4.8.7 JSTAR

A-014-3. Does your father require any care and, if he does, how many hour(s) per day? Please include the time required to provide care at home as well as that spent at outside day care facilities, but exclude the traveling time to and from such facilities. If your father is institutionalized, please answer so.

1. Requires care at home (Approximately ____ times(s) per week and ____ hour(s) per day)
2. Institutionalized
3. Does not require care
4. Don't know
5. Refused to answer

A-015-3. Does your mother require any care and, if she does, how many hour(s) per day? Please include the time required to provide care at home as well as that spent at outside day care facilities, but exclude the traveling time to and from such facilities. If your mother is institutionalized, please answer so.

1. Requires care at home (Approximately ____ times(s) per week and ____ hour(s) per day)
2. Institutionalized
3. Does not require care
4. Don't know
5. Refused to answer

A-016-1. Are you currently involved in the care of your mother or father, or do you expect to be in the future?

(Making regular visits to an institutionalized parent is a form of involvement.)

1. Yes
2. No
3. Don't know
4. Refused to answer

A-016-2. Is your spouse currently, or likely to be in the future, involved in the care of your father and/or mother?

(Making regular visits to an institutionalized parent is a form of involvement.)

1. Yes
2. No
3. Don't know
4. Refused to answer

A-016-3. [To the interviewer: Show Card A-016-3 in asking the following question.]

Besides you and your spouse, who is/are currently, or likely to be in the future, involved in the care of your father and/or mother? Please indicate up to three individuals and enter the number corresponding to their relationship to your parent(s). Please do not include those providing care for fees, such as home helpers and care facility staff.

1. Son
2. Daughter
3. Son-in-law
4. Daughter-in-law
5. Spouse
6. Others (Specify: _____)
7. None except for the respondent and his/her spouse

A-019-3. Does your father-in-law require any care and, if he does, how many hour(s) per day? Please include the time required to provide care at home as well as that spent at outside day care facilities, but exclude the travelling time to and from such facilities.

1. Requires care at home (Approximately ____ times(s) per week and ____ hour(s) per day)
2. Institutionalized
3. Does not require care
4. Don't know
5. Refused to answer

A-020-3. Does your mother-in-law require any care and, if she does, how many hour(s) per day? Please include the time required to provide care at home as well as that spent at outside day care facilities, but exclude the traveling time to and from such facilities.

1. Requires care at home (Approximately ____ times(s) per week and ____ hour(s) per day)
2. Institutionalized
3. Does not require care 4. Don't know
5. Refused to answer

A-021-1. Are you currently, or likely to be in the future, involved in the care of your mother-in-law and/or father-in-law? (Making regular visits to an institutionalized parent-in-law is a form of involvement.)

1. Yes
2. No
3. Don't know
4. Refused to answer

A-021-2. Is your spouse currently, or likely to be in the future, involved in the care of his/her mother and/or father? (Making regular visits to an institutionalized parent is a form of involvement.)

1. Yes
2. No
3. Don't know
4. Refused to answer

A-021-3. [Interviewer: Ask question after showing card A-021-3.]

Besides you and your spouse, who is/are currently, or likely to be in the future, involved in the care of your father-in-law and/or mother-in-law? Please indicate up to three individuals and enter the number corresponding to their relationship to your parent(s)-in-law. Please do not include those providing care for fees, such as home helpers and care facility staff.

1. Son
2. Daughter
3. Son-in-law
4. Daughter-in-law
5. Parent's spouse
6. Other (Describe:)
7. No one other than respondent or spouse

D-013-X-Y (X: 1~6; Y: 1~6). You said you have difficulty in performing [xxxxx] (description of activity as described in D-013-1 through D-013-6 as appropriate). Who helps you with this activity? Now I will read out a list of different types of persons. For each type, please say yes if you receive help and no if you do not.

1. Family member(s) living together
2. Family member(s) living separately
3. Relative(s) other than family member(s)
4. Friend(s), acquaintance(s), etc.
5. Volunteer helper(s)
6. Public caregiver, private housekeeper, etc.

H-046. During the past 12-month period, did you provide personal care to your family members, relatives, friends, or neighbors or help any of such persons with non-personal tasks such as housekeeping and filling out documents or by listening to their worries and concerns?

1. Yes
2. No
3. Don't know
4. Refused to answer

H-047. Let me ask more specifically. Did you provide personal care involving physical contact, such as helping change clothes, bathing, eating, and going to the bathroom?

1. Yes
2. No
3. Don't know
4. Refused to answer

H-047-1. [To the interviewer: Show Card H-047-1 in asking the following question.] To whom did you provide such personal care? Please select all that apply.

1. Family member(s) living with you (Specify: _____)
2. Family member(s) and relative(s) not living with you (Specify: _____)
3. Friend(s) or neighbor(s)
4. Other (Specify: _____)

H-047-2. Over the past 12-month period, how often did you provide such care? Please select the one that best describes your answer.

1. Every day
2. Every week
3. Every month
4. Several times a year
5. Don't know
6. Refused to answer

H-048. Now I would like to ask about non-personal help. During the past 12-month period, did you help anyone with household tasks, such as cooking, doing laundry, changing light bulbs, moving furniture, shopping, and tending the garden?

1. Yes
2. No
3. Don't know
4. Refused to answer

H-048-1. [To the interviewer: Show Card H-048-1 in asking the following question.] Who did you help with such household tasks? Please select all that apply.

1. Family member(s) living with you (Specify: _____)
2. Family member(s) or relative(s) not living with you (Specify: _____)

3. Friend(s) or neighbor(s)
4. Other (Specify: _____)

H-048-2. Over the past 12-month period, how often did you provide such help? Please select the one that best describes your answer.

1. Every day
2. Every week
3. Every month
4. Several times a year
5. Don't know
6. Refused to answer

H-049. During the past 12-month period, did you help anyone fill out tax returns, pension-related forms, or other documents for financial or legal matters?

1. Yes
2. No
3. Don't know
4. Refused to answer

H-049-1. [To the interviewer: Show Card H-049-1 in asking the following question.] Who did you help with such documents? Please select all that apply.

1. Family member(s) living with you (Specify: _____)
2. Family member(s) or relative(s) not living with you (Specify: _____)
3. Friend(s) or neighbor(s)
4. Other (Specify: _____)

H-049-2. Over the past 12-month period, how often did you provide such help? Please select the one that best describes your answer.

1. Every day
2. Every week
3. Every month
4. Several times a year
5. Don't know
6. Refused to answer

H-052. Next, I would like to ask about the care or help you might have received from others. During the past 12-month period, did you receive personal care from your family members, relatives, friends, or neighbors or was you helped by any of such persons with housekeeping, filling out documents, or worries and concerns?

1. Yes
2. No
3. Don't know
4. Refused to answer

H-053. Let me ask more specifically. Did you receive personal care involving physical contact, such as help with changing clothes, bathing, eating, and going to the bathroom?

1. Yes
2. No
3. Don't know
4. Refused to answer

H-053-1. [To the interviewer: Show Card H-053-1 in asking the following question.] From whom did you receive such personal care? Please select all that apply.

1. Family member(s) living with you (Specify: _____)
2. Family member(s) or relative(s) not living with you (Specify: _____)
3. Friend(s) or neighbor(s)
4. Other (Specify: _____)

H-053-2. Over the past 12-month period, how often did you receive such personal care? Please select the one that best describes your answer.

1. Every day
2. Every week
3. Every month
4. Several times a year
5. Don't know
6. Refused to answer

H-054. Now I would like to ask about non-personal care. During the past 12-month period, did you receive help with household tasks, such as cooking, doing laundry, changing light bulbs, moving furniture, shopping, and tending the garden?

1. Yes
2. No
3. Don't know
4. Refused to answer

H-054-1. [To the interviewer: Show Card H-054-1 in asking the following question.] Who helped you with such household tasks? Please select all that apply.

1. Family member(s) living with you (Specify: _____)
2. Family member(s) or relative(s) not living with you (Specify: _____)
3. Friend(s) or neighbor(s)
4. Other (Specify: _____)

H-054-2. Over the past 12-month period, how often did you receive such help? Please select the one that best describes your answer.

1. Every day
2. Every week
3. Every month
4. Several times a year
5. Don't know
6. Refused to answer

H-055. During the past 12-month period, did you receive help from anyone with filling out tax returns, pension-related forms, or other documents for financial or legal matters?

1. Yes
2. No
3. Don't know
4. Refused to answer

H-055-1. [To the interviewer: Show Card H-055-1 in asking the following question.] Who helped you with such documents? Please select all that apply.

1. Family member(s) living with you (Specify: _____)
2. Family member(s) or relative(s) not living with you (Specify: _____)
3. Friend(s) or neighbor(s)
4. Other (Specify: _____)

H-055-2. Over the past 12-month period, how often did you receive such help? Please select the one that best describes your answer.

1. Every day
2. Every week
3. Every month
4. Several times a year

5. Don't know

6. Refused to answer

4.8.8 TILDA

TC014. In the last 2 years, excluding childcare, have you (and/or your spouse/partner) spent at least 1 hour a week helping your adult children and/or grandchildren with things like:

- 1) Practical household help, e.g. with home repairs, gardening, transportation, shopping, household chores
- 2) Help with paperwork, such as filling out forms, settling financial or legal matters

1. Yes

5. No GO TO TC016

98. DK

99. RF

TC015. About how many hours per month on average did you (and/or your spouse/partner) provide such help to your children?

1 ... 750

98. DK

99. RF

TC016. In the last two years, have you (or your spouse/partner) spent at least 1 hour a week taking care of grandchildren or great-grandchildren (who live outside your own household)?

1. Yes

5. No GO TO TC018

97. Not applicable GO TO TC018

98. DK

99. RF

TC017. About how many hours on average per month did you (and/or your spouse/partner) spend taking care of your grandchildren or great grandchildren (who live outside your own household)?

1 ... 750

98. DK

99. RF

TC021. In the last 2 years, have your (and/or your spouse's/partner's) children or

grandchildren spent at least 1 hour a week, helping you and/or your spouse/partner with things like:

- 1) Practical household help, e.g. with home repairs, gardening, transportation, shopping, household chores

2) Help with paperwork, such as filling out forms, settling financial or legal matters

1. Yes

5. No GO TO TC023

98. DK

99. RF

TC022. About how many hours per month on average did you (or your spouse/partner) receive such help from your children (or grandchildren)?

1 ... 750

98. DK

99. RF

TC023. In the last 2 years, did your relatives give you (and your spouse/partner) any help with things like:

1) Practical household help, e.g. with home repairs, gardening, transportation, shopping, household chores

2) Help with paperwork, such as filling out forms, settling financial or legal matters

1. Yes

5. No GO TO TC025

98. DK

99. RF

TC024. About how many hours per month of such help did you receive from other relatives over the last two years?

0 ... 750

98. DK

99. RF

TC025. Please look at card TC4. In the last 2 years, did you (or your spouse/partner) give any kind of help to your relatives with things like:

1) Practical household help, e.g. with home repairs, gardening, transportation, shopping, household chores

2) help with personal care, such as dressing, eating, getting into and out of bed, using the toilet

3) help with paperwork, such as filling out forms, settling financial or legal matters

1. Yes

5. No GO TO TC027

98. DK

99. RF

TC026. About how many hours per month on average did you give such help in the last two years?

0 ... 750

98. DK

99. RF

TC027. In the last 2 years, did your neighbours or friends give you (or your spouse/partner) any kind of help such as:

1) Household help: help with home repairs, gardening, transportation, shopping, household chores

2) Help with paperwork, such as filling out forms, settling financial or legal matters IWER: CODE THE ONE THAT APPLIES

1. Yes

5. No GO TO TC029

98. DK

99. RF

TC028. About how many hours per month of such help did you receive from friends and neighbours over the last two years?

0 ... 750

98. DK

99. RF (SHARE)

TC029. In the last 2 years, did you (or your spouse/partner) give any kind of help to your friends, and neighbours (who did not pay you) such as:

1) household help: help with home repairs, gardening, transportation, shopping, household chores

2) help with personal care, such as dressing, eating, getting into and out of bed, using the toilet

3) help with paperwork, such as filling out forms, settling financial or legal matters

1. Yes

5. No GO TO TC031

98. DK

99. RF

TC030. About how many hours per month on average did you give such help in the last two years?

0 ... 750

98. DK

99. RF

FL005. Does anyone ever help you with dressing including putting on shoes and socks?

1. Yes

5. No

98. DK

99. RF

FL008. Does anyone ever help you with walking across a room?

1. Yes

5. No

98. DK

99. RF

FL011. Does anyone ever help you with bathing or showering?

1. Yes

5. No

98. DK

99. RF

FL013. Does anyone ever help you with eating?

1. Yes

5. No

98. DK

99. RF

FL016. Does anyone ever help you with getting into or out of bed?

1. Yes

5. No

98. DK

99. RF

FL019. Does anyone ever help you with using the toilet, including getting on and off to the toilet?

1. Yes

5. No

98. DK

99. RF

FL020. Who most often helps you with (getting across a room / dressing / bathing / eating / getting in / out of bed / using the toilet)?

Text: up to 60 characters

98. DK

99. RF

FL020a. select person from the household list

FL020b. Is <FL020> male or female?

1. Male

2. Female

FL021. What is that person's relationship to you?

1. Spouse / partner

2. Child / adopted child

3. Step Child

4. Child-in-law (daughter-in-law, son-in-law)

5. Parent

6. Parent-in-law

7. Brother or sister

8. Brother-in-law/Sister-in-law

9. Grandparent

10. Grandparent-in-law

11. Other blood relative

12. Other in-law

13. Grandchild

14. Non-relative

FL022_1~3. Does anyone else help you with this activity/these activities?

1. Yes 5. No 98. DK 99. RF

FL023_1~3. What is her/his first name? Text: up to 60 characters

98. DK

99. RF

FL023b_1~3. Is <FL023> male or female?

1. Male

2. Female

FL024_1~3. What is that person's relationship to you?

1. Spouse / partner
2. Child/ adopted child
3. Step Child
4. Child-in-law (daughter-in-law, son-in-law)
5. Parent
6. Parent-in-law
7. Brother or sister
8. Brother-in-law/Sister-in-law
9. Grandparent
10. Grandparent-in-law
11. Other blood relative
12. Other in-law
13. Grandchild
14. Non-relative

FL026. Does anyone help you with preparing a hot meal?

1. Yes
5. No
98. DK
99. RF

FL027. Does anyone help you with doing household chores?

1. Yes
5. No
98. DK
99. RF

FL028. Does anyone help you with shopping for groceries?

1. Yes
5. No
98. DK
99. RF

FL029. Does anyone help you make phone calls?

1. Yes
5. No
98. DK
99. RF

FL030. Does anyone help you take your medications?

1. Yes

5. No

98. DK

99. RF

FL031. Does anyone help you with managing your own money?

1. Yes

5. No

98. DK

99. RF

FL032. Who most often helps you with (preparing meals/doing household chores/shopping for groceries/making telephone calls/your medications)?

Text: up to 60 characters

98. DK

99. RF

FL032a. select person from the household list

FL032b. Is <FL032> male or female?

1. Male

2. Female

FL033. What is that person's relationship to you?

1. Spouse / partner

2. Child/ adopted child

3. Step Child

4. Child-in-law (daughter-in-law, son-in-law) 5. Parent

6. Parent-in-law

7. Brother or sister

8. Brother-in-law/Sister-in-law 9. Grandparent

10. Grandparent-in-law

11. Other blood relative

12. Other in-law

13. Grandchild

14. Non-relative

FL034. Does anyone else help you with this activity/these activities?

1. Yes

5. No

98. DK

99. RF

FL034b_1~3. select person from the household list

FL035_1~3. What is his/her first name? Text: up to 60 characters

98. DK

99. RF

FL035b_1~3. Is <FL035> male or female?

1. Male

2. Female

FL036_1~3. What is that person's relationship to you?

1. Spouse / partner

2. Child/ adopted child

3. Step Child

4. Child-in-law (daughter-in-law, son-in-law)

5. Parent

6. Parent-in-law

7. Brother or sister

8. Brother-in-law/Sister-in-law 9. Grandparent

10. Grandparent-in-law

11. Other blood relative

12. Other in-law

13. Grandchild

14. Non-relative

FL037. Who most often helps you to manage your money? Text: up to 60 characters

98. DK

99. RF

FL037a. select person from the household list

FL037b. Is <FL037> male or female?

1. Male

2. Female

FL038. What is that person's relationship to you?

1. Spouse / partner

2. Child/ adopted child

3. Step Child

4. Child-in-law (daughter-in-law, son-in-law)

5. Parent
6. Parent-in-law
7. Brother or sister
8. Brother-in-law/Sister-in-law
9. Grandparent
10. Grandparent-in-law
11. Other blood relative
12. Other in-law
13. Grandchild
14. Non-relative

FL039. Does anyone else help you with this activity/these activities?

1. Yes
5. No
98. DK
99. RF

FL039b_1~3. select person from the household list

FL040_1~3. What is his/her first name? Text: up to 60 characters

98. DK
99. RF

FL040b_1~3. Is <FL040> male or female?

1. Male
2. Female

FL041_1~3. What is that person's relationship to you?

1. Spouse / partner
2. Child/ adopted child
3. Step Child
4. Child-in-law (daughter-in-law, son-in-law)
5. Parent
6. Parent-in-law
7. Brother or sister
8. Brother-in-law/Sister-in-law
9. Grandparent
10. Grandparent-in-law
11. Other blood relative
12. Other in-law
13. Grandchild
14. Non-relative

FL042_1~3. Let's think for a moment about the help you receive with the difficulties that we just talked about.

During the last month, on about how many days did HELPER's NAME help you?

0... 31

98. RF

99. DK

FL043_1~3. On the days when HELPER's NAME helps you, about how many hours per day do they spend helping you?

IWER: IF HELPER PROVIDES LESS THAN AN HOUR PER DAY CODE 1

1...24

2. 98. DK

3. 99. RF

4.8.9 MHAS

F5. Because of a health problem does your mother need any help with basic personal needs like dressing, eating or bathing?

1. Yes
2. No
8. RF
9. DK

F12. Because of a health problem does your father need any help with basic personal needs like dressing, eating or bathing?

1. Yes
2. No
8. RF
9. DK

F43. During the last two years, have you (and/or your spouse) helped your parents with basic activities such as dressing, eating or bathing because of a health problem. Exclude help with household chores, errands and transportation.

1. Yes
2. No
8. RF
9. DK

F44. Was this help for at least 1 hour a week, or about 100 hours in the last two years?

F45. Who received this help?

1. Mother
2. Father
3. Both
8. RF
9. DK

F46_1. About how many hours did you spend helping (her/him/them)?-Number of hours

888. RF

999. DK

n. Other values > 0

F46_2. About how many hours did you spend helping (her/him/them)?-Period

1. Day
2. Week
3. Month
4. Year

F51. During the last 2 years, did any of your siblings (or their spouses) help you parents with basic personal activities such as dressing, eating or bathing because of a health problem? Exclude help with household chores, errands, and transportation.

1. Yes
2. No
8. RF
9. DK

F52. Was this help for at least one hour a week, or about 100 hours in the last 2 years?

1. Yes
2. No
8. RF
9. DK

F53. Who received this help?

1. Mother
2. Father
3. Both
8. RF
9. DK

F54. Between you and your siblings, who gave the most support?

1. You
2. Other sibling
3. All equal
8. RF
9. DK

F55. Have you and one or more of your siblings agreed to share only the responsibilities of personal care for your parents

- 1. Yes
- 2. No
- 8. RF
- 9. DK

F56. Excluding yourself, how many siblings have agreed to share these responsibilities?

- 88. RF
- 99. DK

G10. In the last two years, have you (or your spouse) spent at least one hour a week, helping your children/their spouses/your grandchildren (or those of your spouse)?

- 1. Yes
- 2. No
- 8. RF
- 9. DK

G11. Which children?

<Children are identified by registration numbers.>

- 103-119. Resident children
- 201-219. Non-resident children
- 251-261. Deceased children
- 781. All
- 888. RF
- 999. DK

G12_1. In total, about how many hours did you (or your spouse) spend helping your children/their spouses/your grandchildren (or those of your spouse)?

G12_1 Number of hours

- 888. RF
- 999. DK

G12_2. In total, about how many hours did you (or your spouse) spend helping your children/their spouses/your grandchildren (or those of your spouse)?

G12_2 Period

1. In total
2. Week
3. Month
4. Year

G13. Would you say that it was...

1. less than 2 hours a week
2. from 2 to 4 hours a week
3. more than 4 hours a Week
8. RF
9. DK

G24. In the last two years, have your (or your spouse's) children/their spouses/grandchildren spent at least one hour a week helping you with household chores, errands, transportation, etc?

1. Yes
2. No
8. RF
9. DK

G25_1~3. Which child(ren) or grandchild(ren) helped you?

<Children are identified by registration numbers.>

- 103-119. Resident children
- 201-219. Non-resident children
- 251-261. Deceased children
781. All
888. RF
999. DK

G29. Do you have neighbors or friends you can count on for daily activities, such as bringing food if you are sick, or bringing you something from the store?

1. Yes
2. No
8. RF
9. DK

G31. The help with household chores, errands and transportation you received from your children, sons/daughters-in-law, grandchildren (and those of your spouse), would you say it is...

1. More than sufficient
2. sufficient
3. Not sufficient
8. RF
9. DK

H14. Does anyone ever help you get dressed?

1. Yes
2. No
8. RF
9. DK

H15E. Does your spouse help you with walking across a room?

1. Yes
2. No
8. RF
9. DK

H15F. Does anyone (else) ever help you with walking across a room?

1. Yes
2. No
8. RF
9. DK

H16E. Does your spouse help you with bathing or showering?

1. Yes
2. No
8. RF
9. DK

H16F. Does anyone (else) ever help you with bathing or showering?

1. Yes

- 2. No
- 8. RF
- 9. DK

H17E. Does your spouse help you with eating, such as cutting your food?

- 1. Yes
- 2. No
- 8. RF
- 9. DK

H17F. Does anyone (else) ever help you with eating, such as cutting your food?

- 1. Yes
- 2. No
- 8. RF
- 9. DK

H18E. Does your spouse help you with getting in or out of bed?

- 1. Yes
- 2. No
- 8. RF
- 9. DK

H18F. Does anyone (else) ever help you with getting in or out of bed?

- 1. Yes
- 2. No
- 8. RF
- 9. DK

H19E. Does your spouse help you with using the toilet, including getting on and off the toilet or squatting?

- 1. Yes
- 2. No
- 8. RF
- 9. DK

H19F. Does anyone (else) ever help you with using the toilet, including getting on and off the toilet or squatting?

1. Yes
2. No
8. RF
9. DK

H22. Please tell me who helps you with these activities? We will begin with a list of your children, sons/daughters-in-law, grandchildren and other people.

01. Spouse
02. Child
03. Child-in-law
04. Grandchild
05. Parent
06. Other relative
07. Other person
08. Paid person
88. RF
99. DK

H23. If the person is included in any roster, note the roster registration number.

< If child-in-law/grandchild not the number of the child he/she is related to.>

- 001-002. Selected person or spouse-2001
- 003-004. New spouse of selected or of spouse-2003
- 103-119. Resident children
- 201-219. Non-resident children
666. Person not on any list

H24. During the past month, about how many days did (NAME) help you?

H25. On those days that (NAME) helps you, about how many hours does he/she help you?

H26D. Does your spouse help you with preparing a hot meal?

1. Yes
2. No
8. RF
9. DK

H26E. Does anyone (else) ever help you with preparing a hot meal?

- 1. Yes
- 2. No
- 8. RF
- 9. DK

H27D. Does your spouse help you with shopping for groceries?

- 1. Yes
- 2. No
- 8. RF
- 9. DK

H27E. Does anyone (else) ever help you with shopping for groceries?

- 1. Yes
- 2. No
- 8. RF
- 9. DK

H28D. Does your spouse help you with taking medications (if you take any or needed to do so)?

- 1. Yes
- 2. No
- 8. RF
- 9. DK

H28E. Does anyone (else) ever help you with taking medications (if you take any/or needed to do so)?

- 1. Yes
- 2. No
- 8. RF
- 9. DK

H29D. Does your spouse help you managing your money?

- 1. Yes
- 2. No
- 8. RF

9. DK

H29E. Does anyone (else) ever help you managing your money?

1. Yes

2. No

8. RF

9. DK

H32. Please tell me who helps you with these activities? We will begin with a list of your children, sons/daughters-in-law, grandchildren and other people.

01. Spouse

02. Child

03. Child-in-law

04. Grandchild

05. Parent

06. Other relative

07. Other person

08. Paid person

88. RF

99. DK

H33. Please tell me who helps you with these activities? We will begin with a list of your children, sons/daughters-in-law, grandchildren and other people.

<Persons are identified by their registration number. If child-in-law or grandchild, note the registration number of the child that he/she is related to.>

001-002. Selected person or spouse-2001

003-004. New spouse of selected person or spouse-2003

103-119. Resident children

201-219. Non-resident children

666. Person not listed

H34. During the past month, about how many days did (NAME) help you?

H35. On those days that (NAME) helps you, about how many hours does he/she help you?

4.8.10 IFLS

KK04b. If you need to do any of the daily activities listed in KK03A-KK03Q, do you need someone to assist you?

3. No

1. Yes

KK04c. Who most often assisted you?

Name: _____

PID: _____ (51 IF NOT IN HH ROSTER)

KK04d. What is his/.her relationship with you

02. Spouse

03. Child (biological)

04. Child (adopted)

05. Son/daughter in law

06. Parent

07. Father/mother in law

08. Sibling

09. Brotherssister in law

10. Grandchild

11. Grandparent

12. Uncle/aunt

13. Nephew/Niece

14. Cousin

15. Servants

16. Other relative

17. Other non relative

KK04e. During the last 4 weeks, about how many days did [...] help you?

1. |__|__| days

8. DON'T KNOW

KK04f. On the days [...] helps you, about how many hours per day is that?

1. |__|__| hours

8. DON'T KNOW

KK04g. Is [...] paid to help you?

1. Yes
3. No

KK04h. Is there any other person help you?

1. Yes
3. No

KK04i. In the last 4 weeks, how much money did you spend to have someone assisted you in the daily activities mentioned above?

1. Rp , ,
6. DID NOT HAVE TO PAY
8. DON'T KNOW

KK04j. If in the future you need someone to assist you in one of the daily activities above, who do you think will assist you besides your spouse?

Name: _____

PID: _____ (51 IF NOT IN HH ROSTER)

KK04k. What is his/.her relationship with you

03. Child (biological)
04. Child (adopted)
05. Son/daughter in law
06. Parent
07. Father/mother in law
08. Sibling
09. Brotherssister in law
10. Grandchild
11. Grandparent
12. Uncle/aunt
13. Nephew/Niece
14. Cousin
15. Servants
16. Other relative

17. Other non relative

BA14b. Now/before death does/did your father/mother need help with basic personal needs like dressing, eating, or bathing?

Yes. 1

No. 3

UNWILLING TO ANSWER. 7

DON'T KNOW. 8

BA19. During the past 12 months (before his/her death) did you (or your spouse) ever provide help to [Father and Mother Live Together/ Father Only/ Mother Only] in the form of money, goods or service?

UNWILLING TO ANSWER. 7

No. 3

Yes. 1

BA20. What type of help did you provide to [Father and Mother Live Together/ Father Only/ Mother Only] in the past 12 months (before his/her death) and how much?

(ANSWER MAY BE MORE THAN ONE)

A. Money, loan, tuition, healthcare costs (including treatment)

D. Value of food stuff or other goods

G. Doing household chores, or providing child care or assisting during physical recovery (days/months)

H. Helping family business (days/months)

V. Other

BA21. During the past 12 months (before his/her death) did you (or your spouse) ever receive help from [Father and Mother Live Together/ Father Only/ Mother Only] in the form of money, goods or service?

UNWILLING TO ANSWER. 7

No. 3

Yes. 1

BA22. What type of help did you receive from [Father and Mother Live Together/ Father Only/ Mother Only] in the past 12 months (before his/her death) and how much?

(ANSWER MAY BE MORE THAN ONE)

A. Money, loan, tuition, healthcare costs (including treatment)

D. Value of food stuff or other goods

G. Doing household chores, or providing child care or assisting during physical recovery (days/months)

H. Helping family business (days/months)

V. Other

BA54. During the past 12 months, did you (or your spouse) ever **provide** help to siblings who do not live in the HH (including those who died within the last 12 months) in the form of money, goods or service?

UNWILLING TO ANSWER. 7

No. 3

Yes. 1

BA55. What type of help did you (or your spouse) provide to the siblings during the past 12 months and how much?

(ANSWER MAY BE MORE THAN ONE)

A. Money, loan, tuition, healthcare costs (including treatment)

D. Value of food stuff or other goods

G. Doing household chores, or providing child care or assisting during physical recovery (days/months)

H. Helping family business (days/months)

V. Other

BA56. During the past 12 months/12 months before death, did you (or your spouse) ever receive help from siblings who do not live in the HH (including those who died in the last 12 months) in the form of money, goods or service?

UNWILLING TO ANSWER. 7

No. 3

Yes. 1

BA57. What type of help did you (or your spouse) receive from the siblings during the past 12 months and how much?

(ANSWER MAY BE MORE THAN ONE)

A. Money, loan, tuition, healthcare costs (including treatment)

D. Value of food stuff or other goods

G. Doing household chores, or providing child care or assisting during physical recovery (days/months)

H. Helping family business (days/months)

V. Other

BA87a. In the past 12 months, did you provide assistance to [...] in the form of money, goods, or services?

UNWILLING TO ANSWER. 7

No. 3

Yes. 1

BA88. What type of assistance did you provide to [...] and what is the value?

(CIRCLE AND FILL ALL THAT APPLY)

- A. Money (loans, tuition, healthcare cost)
- D. Food stuff or other goods
- G. Chores, child care (days/months)
- H. Help with family business (days/months)
- V. Other

BA89a. In the past 12 months, did you **receive** assistance from [...] in the form of money, goods, or services?

UNWILLING TO ANSWER. 7

No. 3

Yes. 1

BA90. What type of assistance did you receive to [...] and what is the value?

(CIRCLE AND FILL ALL THAT APPLY)

- A. Money (loans, tuition, healthcare cost)
- D. Food stuff or other goods
- G. Chores, child care (days/months)
- H. Help with family business (days/months)
- V. Other

TF03. In the past 12 months, did you or your spouse **provide** assistance to [Respondent's spouse not in the household/ Non-biological parents not in the household/ Family members other than your parents, siblings or children] in the form of money, goods, or services?

No. 3

Yes. 1

TF04. In the past 12 months, what type of assistance did you or your spouse provide to [Respondent's spouse not in the household/ Non-biological parents not in the household/ Family members other than your parents, siblings or children] and what is the value?

- A. Money or loans

- B. Tuition
- C. Health care costs
- D. Food stuffs or other goods
- G. Chores, child care, care for sick family (days/months)
- H. Help family business (days/months)
- V. Other

TF05. In the past 12 months, did you or your spouse **receive** assistance from [Respondent's spouse not in the household/ Non-biological parents not in the household/ Family members other than your parents, siblings or children] in the form of money, goods, or services?

No. 3

Yes. 1

TF06. In the past 12 months, what type of assistance did you or your spouse receive from [Respondent's spouse not in the household/ Non-biological parents not in the household/ Family members other than your parents, siblings or children] and what is the value?

- A. Money or loans
- B. Tuition
- C. Health care costs
- D. Food stuffs or other goods
- G. Chores, child care, care for sick family (days/months)
- H. Help family business (days/months)
- V. Other

BX87a. In the past 12 months, did you provide assistance to [...] in the form of money, goods, or services?

1. Yes

3. No

7. UNWILLING TO ANSWER

BX88. What type of assistance did you provide to [...] and what is the value?

(CIRCLE AND FILL ALL THAT APPLY)

- A. Money (loans, tuition, healthcare cost)
- D. Food stuff or other goods
- G. Chores, child care (days/months)
- H. Help with family business (days/months)

V. Other

BX89a. In the past 12 months, did you **receive** assistance from [...] in the form of money, goods, or services?

1. Yes

3. No

7. UNWILLING TO ANSWER

BX90. What type of assistance did you receive to [...] and what is the value?

(CIRCLE AND FILL ALL THAT APPLY)

A. Money (loans, tuition, healthcare cost)

D. Food stuff or other goods

G. Chores, child care (days/months)

H. Help with family business (days/months)

V. Other

Appendix: Intra-survey changes, across waves

The following table lists differences across waves by survey (applicable if more than one wave was referred to).

ELSA	SHARE	KLoSA	MHAS
ERMOTIVA asked in Wave 2, 3 & 4	PH050 & PH051 not in Wave 4	Ba48, Ba49 & Ba50 in Wave 1 correspond to Ba075, Ba080 & Ba079 respectively in Waves 2 & 3	F37, F38, F39, F40_1, F40_2, F44, F45, F46, F47, F48 & F49 Wave 1 correspond to F43, F44, F46_1, F46_2, F51, F52, F53, F54, F55 & F56 respectively in Wave 2
RSCARE & RSCAREY asked only in Wave 3	SP004 & SP006 not in Wave 4	Ba069, Ba070, Ba071, Ba072, Ba073, Ba074, Ba076, Ba077, Ba078 not in Wave 1	G11, G12_1~3, G13_1, G13_2, G14, G25, G26_1~3 & G30 in Wave 1 correspond to G10, G11, G12_1, G12_2, G13, G24, G25_1~3 & G29 respectively in Wave 2
HEHPH, HEHPW, HEHPP, HEHPT, HEHPM not in Wave 1 & 2	SP010 & SP012 not in Wave 4	B180, B181, B182, B183, B184 & B185 in Wave 1 correspond to B170, B171, B172, B173, B174 & B175 respectively in Waves 2 & 3	G31 not in Wave 1
ERResCk, ERResBk, ERResRy only in Wave 4 & 5	SP017 not in Wave 4	Cb18, Cb19, Cb20 & Cb21 in Wave 1 correspond to C218, C219, C220 & C221 respectively in Waves 2 & 3	H(15/16/17/18/19)_3/4 in Wave 1 correspond to H(15/16/17/18/19)E/F respectively in Wave 2.
Granchildren dropped as an option for the mentioned HEHP* variables starting Wave 4		Cb22, Cb23, Cb24, Cb25, Cb26, Cb27, Cb28, Cb29 only in Wave 1	Spouse not listed as an option for H22 & H32 in Wave 1
Providing Care questions were placed in the Social Participation Module in Wave 1; shifted to Effort and Reward Module thereafter.		Cb32 and Cb33 from Wave 1 are combined as C224 in Wave 2 & 3.	H(26/27/28/29)_3/4 in Wave 1 correspond to H(26/27/28/29)D/E respectively in Wave 2.