MEXICAN HEALTH AND AGING STUDY (MHAS 2001)

QUESTIONNAIRE APPLICATION MANUAL 2001
Presentation

The National Institute of Statistics, Geography, and Informatics (INEGI), presents the Mexican Health and Aging Survey Interviewers' Manual (MHAS-2001). The purpose of this document is to present the activities, functions and responsibilities of the personnel in charge of collecting through the questionnaire application during 2001. The goal is to perform this task with the highest quality standards.
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Introduction

The main objective of this manual is to present the concepts, goals, and field procedures for the Mexican Health and Aging Survey 2001 (MHAS), and also the correct handling of the field material that will be used in the first of the two waves: the first in 2001, and the second in 2003. Therefore, this manual presents the correct way for filling in and handling the Household Rosters for regular residents and non-resident children; as well as the interview sheet and the remaining chapter of the basic questionnaire.

This publication is addressed to all personnel taking part in the activities of the survey, primarily the interviewers; however, it is also useful for data analysts interested in data quality in MHAS and anyone interested in the process of obtaining statistics for individuals of middle and old age in Mexico.

The manual has eight chapters. The first chapter provides an overview. The second chapter describes the task of the interviewer, as well as some characteristics and specific considerations to be taken into account when collecting information from individuals of middle and old age. The third chapter describes the activities after fieldwork. Chapters four and five focus on the questionnaire and each of its sections, giving specific instructions on how to complete them. The last three chapters deal with proxy respondents, future contacts, and the handling of the non-interview case, respectively.

Anthropometric measures were made on a sub-sample of respondents. These measures include height, weight, and hip circumference, among others. These measures can be used to describe overall health and nutritional status. Field supervisors will perform this specific activity; who will conduct full interview.
1. PROJECT PRESENTATION

This chapter summarizes the general and specific objectives of the study, the conceptual design, and the sample design.

1.1 GENERAL OBJECTIVE

The Mexican Health and Aging Study (MHAS) is a prospective panel study, in which respondents will be visited in 2001 and in 2003. MHAS collects data on many aspects of aging for a representative panel of Mexicans age fifty or older. Respondents are selected from the household rosters collected in the fourth quarter of the 2000 National Survey of Employment (Encuesta Nacional de Empleo – ENE).

MHAS data are collected on the on demographic and migration history; health (physical, cognitive, emotional, functional); family networks; flow of resources across three generations of a family; labor activity, wages, work history, assets, and use of health services.

The longitudinal design will capture, not only the well being of individuals of middle and old age, but also the changes that occur with time in each of these conditions. The health conditions of three subgroups are of particular interest: migrants who returned to Mexico after periods of residence in the United States, Mexicans with no residence history in the United States, and Mexicans with only domestic moves.

This information will be useful, on the one hand, to evaluate policies on health, employment, pensions, and institutional support directed to the elderly and their families, acknowledging the family is the institution providing elderly care. The information also is useful for considering the ways in which inter-generational transfer systems affect the health of the elderly in Mexico, where migration is common and remittances might repay prior investment reimbursements or insure elderly parents against uncertainty.

1.2 SPECIFIC OBJECTIVES

The specific objectives of the survey include the following:

a) Provide information about perceived health conditions, cognitive status, and use of health services among the medium-age and older people, defined as 50 or older in the year 2000, who were residents in urban or rural homes in Mexico.

b) Identify the conditions of employment, income, well-being, pension availability, and family networks among individuals of middle and old age.

c) Determine the role that family networks and migration play as a family strategy to improve the well-being of individuals of middle and old age.
1.3 CONCEPTUAL DESIGN

MHAS 2001 design used previous studies of the main bibliographical sources and existing experiences with similar research in Mexico and other countries. Based on these experiences, a group was formed among the personnel of the National Survey on Employment (ENEU/ENE) of INEGI, researchers from the Universities of Pennsylvania and Wisconsin, and Georgetown University in the U.S., and personnel from Mexican health institutions in order to: elaborate the current version of the basic questionnaire; determine the characteristics of the sample; write the manuals; and train interviewers or researchers for fieldwork.

1.4 SAMPLE DESIGN

For this research a household survey scheme will be used. From the National Survey on Employment (ENEU/ENE), collected in the fourth quarter (Oct to Dec) of 2000, based on a multistage and stratified sample scheme, a sub-sample is obtained with the following characteristics: a) habitual residents of the household, b) 50 or older at the time of ENE 2000. From this group the people for MHAS are selected to be interviewed.

1.5 SAMPLE SELECTION CRITERIA

MHAS 2001 will include all individuals from ENE 2000 that fulfill the following criteria: of age 50 or older and have permanent residence in the household. People residing in institutions like hospitals and asylums are excluded from the sample.

1.6 SURVEY COLLECTION

This survey will take place from May to August 2001, seven to nine months after the collection of the National Survey on Employment (ENE 2000). The selection is regulated by the criteria indicated in this manual. In each household identified for MHAS, the selected individual is interviewed, as well as his/her spouse, regardless of the spouse’s age.

2. INTERVIEWER ACTIVITIES

This chapter summarizes the interviewer activities, which are divided into office activities and field activities. Since MHAS 2001 was designed for direct interviews with individuals of middle and old age, it is necessary to highlight the importance of the interviewer to the success of the research. First, because the interview is direct, the informant can’t be substituted, which means that only the selected person can provide the required information. Thus relationship between interviewer and respondent is key for the research. Second, because it is a fairly
long interview, good conduction of the interview maximizes the chances of completing the interview. Third, at the end of the interview, in some cases, anthropometric measures of the respondent are required, a process that will be much easier and more successful if the interviewer has managed to conduct a good interview and to build a good relationship with the respondent. And fourth, because MHAS is a longitudinal research that requires follow-up interviews with the same people in 2003, so it is important to leave a good impression in 2001 to make the next visit possible.

2.1 OFFICE ACTIVITIES

2.1.1 RECEIVING AND REVIEWING THE WORKLOAD

After having taken the training course for the survey, the supervisor will deliver to you your workload, which will be comprised of:

a) MHAS 2001 questionnaires
b) House list
c) Sample sheet
d) FUP form
e) No-interview Sheet
f) Thank you notes.
g) Additional fieldwork materials

Afterwards you must verify that your workload is complete and the house list corresponds to the zone where the selected households are.

2.1.2 LOCATING THE WORK AREA AND PLANNING INTERVIEW ROUTES

For optimal performance of your activities, it is necessary that before going into the field, you locate your work area on a map stored at the office. It is also convenient to plan the routes following the instructions shown in the sample sheet.

2.2 FIELD ACTIVITIES

2.2.1 IDENTIFICATION OF THE SELECTED PERSON

As indicated earlier, MHAS 2001 is directed at people selected from the ENE-2000, who are 50 years or older and habitual residents of the household. A direct interview will be conducted to the selected person as well as his/her spouse, if there is a spouse residing in the same household, regardless of his/her age. Each individual must provide his/her own information.

As you arrive at the house, ask if the selected person (NAME), who is registered in the sample sheet, lives there. Explain that during the ENEU/ENE visit in
October to December 2000, the persons who answered the interview indicated that (NAME of selected person for MHAS) lived in the house, and has been selected for a special nationwide research project, about individuals of middle and old age and their spouses. The socio-demographic information (sex, age, kinship, marital status) will help the interviewer to identify the selected person. The interviewer must be very discrete with this information. If the data provided by the respondent do not match the Sample Sheet data, he/she must try to find out the correct information, and if there was a change (in marital status for example) or what happened.

If questioned about the way the selected person is being located, explain that research is being conducted all over the country on the health, activity, and well being of individuals of middle and old age and their spouses. Also explain that respondents where located through the ENEU/ENE, and that the information will only be used for statistical purposes and is confidential.

The respondent can’t be substituted. If the selected person refuses to be interviewed, you can’t substitute him/her with someone else. If the person declares not being 50 years or older, and you are able to verify this, make an annotation in the observations sheet, and do the interview if the person states being 40 years or older.

Where other persons are present besides the one being interviewed, ask them in a kindly manner to allow you to do the interview individually (since this is confidential). If they don’t leave, kindly reemphasize bout the confidentiality of the questions, and ask the respondent if he/she agrees to having the other persons remain present.

Before beginning the interview with each of the respondents, make a brief presentation on the objectives of your visit and the institution you work for. Remind them once more that all information is for statistical purposes only, and is confidential.

When one of the persons you are looking for is not home, ask for the day and time when this person can be found, and leave a notice card, indicating that you will come back at the stated time. Remind them that the information can only be provided by the selected person and his/her spouse.

2.2.2 DETERMINING THE TYPE OF INTERVIEW

Selected Person without Couple

MHAS will be applied to all selected persons and their spouses. However, if the selected person is single, widowed, divorced, or separated, the survey will only be applied to the selected person. These cases are known as “household single interviews.”
Selected Person with Couple

In the case that the selected person has a spouse (by marriage or consensual union) that resides in the same household, an individual interview will be conducted with each one of them, regardless of the age of the spouse. These cases are known as “household couple interviews.” Since there are two respondents per household, it is necessary to clearly distinguish between the selected person, and the spouse of the selected person. This distinction will be key in determining the statistical expansion factor assigned to each one. Therefore, it is important not to switch or substitute between the two members of the couple. Bear in mind that in some cases the selected person will be the man, and in others the woman; the sex or position of the person does not determine the selection.

When interviewing a couple, realize that there are sections of the questionnaire that must be collected twice, since they refer to the couple. For this reason, the questionnaire has been structured to collect two different, complementary interviews, that is to say that there are sections asked only in one of the interviews.

Besides avoiding duplicate information, this strategy saves interviewing time. The order of the two interviews is unimportant: meaning that the first interview can be with the selected person or the spouse. As explained in detail later, if possible, it is recommended that the first interview be with the woman in the couple.

2.3 INTERVIEW

The survey is a valuable method in socioeconomic research. It will allow us to know the health, functionality, activity, and economic status of individuals of middle and old age, as well as the type and functioning of their family networks.

The survey is collected through an individual, in–person interview. It consists of a series of questions, which range from health, use of health services, family networks, migration history, and work and income background, to retirement, pension, and anthropometric measures. Hence, it is important that when conducting the interviews you consider the following aspects:

a) It is important to dress adequately for the work zone, this creates trustworthiness and acceptance in the respondent. In former research with older people, relatives wishing to avoid disturbing the older person sometimes turn away the interviewer. Therefore, it is important to inspire trustworthiness also among the people surrounding the selected person. Show security in yourself, and take into account that your ability and enthusiasm will yield optimal results.
b) In the case that the name registered in the Sample Sheet does not match the person that actually lives at the house, go ahead and write it on the questionnaire cover, make the proper annotation in the observations section, and proceed with the interview. Take into account that that the information from ENEU/ENE written in the Sample Sheet could have been given by an uninformed member of the household who made a mistake, or didn’t want to give the correct information. This is the moment to verify the information on the Sample Sheet.

c) Due to their working activities, often people are not in their personal domiciles, and, therefore, it is necessary to ask if it is possible to visit them before or after working hours. Ask for an appointment and (if applicable) ask for the telephone number of the residence or workplace of the person to locate him/her and set the place, time, and date of the interview.

d) The interviewer must not deduce the answer from the information on the Sample Sheet. The questions must be asked verbatim, and in some cases the respondent will deliberately lie (s/he can’t answer the interview, or too busy or sick). In this cases, explain about the confidentiality of the information, and that the information will only be used for statistical purposes in order to show the situation of individuals of middle and old age as a group in Mexico.

e) When the respondent or his/her relatives try to avoid the interview, suggesting that the spouse, a child or other person give the information; explain that the person of interest is the only one who can provide some of the information about health, childhood, family networks, and future beliefs and expectations, and therefore he/she is the only one who can answer the questions of the survey. Allow the other person to be present if you find it suitable, but always with the consent of the respondent.

f) It at any point in the interview the respondent has doubts about answering the questions, especially in the part regarding finance and assets, pensions, and migration history of the children, explain that the answers will only be used to understand older people like the respondent. Add that these factors are important to understanding health and well being of individuals of middle and old age; that the information is approximated, and it will be presented aggregated for all the persons in that age range.

g) It is important that you show interest in the answers of the respondent, this will make him/her feel important as an informant. Take into account that the respondent was selected from ENEU/ENE, which means that the respondent may be revisited again in the following months for ENEU. More over, every person selected for MHAS-2001 will be revisited in 2003; hence it is vital to leave a good impression.

h) At the end or the interview, check that the questions have been fully and duly answered, and clarify any doubts about the information that has been received.

i) Remember not to offer any compensation, help, or gift in exchange for the interview.
2.4 CONSIDERATIONS IN INTERVIEWING ADULTS 50 YEARS OR OLDER

It is important to bear in mind the characteristics of the population targeted in this research, so you can better understand the persons to be interviewed and establish better relationships with them. This will benefit the interview process and the collection of information.

Chart 1.1 presents the information about the changes that normally occur to older adults (left column). It also shows the actions recommended (right column) to support the interviewer in handling each characteristic.

Table 1.1

<table>
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<tr>
<th>I. Physical changes</th>
<th>Recommended actions</th>
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| **A. Sensory depletion** | 1. Speak clearly, slowly, and in a normal tone of voice. Avoid stringent tones.  
2. Repeat questions and categories as many times as needed.  
3. Select a well lighted place for the interview, where environmental noises are avoided.  
4. Sit facing forward and look into the face of the respondent, pronounce the questions well, so the lip movements complement the hearing. |
| • Difficulty in hearing high and low tones, distinguishing between tones, and perceiving the complexity of noises in the environment  
• Difficulty in distinguishing words with letters S, Z, T, F y G.  
• Depletion of sight, peripheral vision and depth perception.  
• Difficulty in adapting to lighting changes. |

| B. Neurological changes | 1. Reduce the pace of the interview (make it slower). Give less information at a time, and in plainer language. Allow more time for the respondent to explain him/her self.  
2. Repeat questions and answer choices often.  
3. Offer keys or signs to help him/her recall the previous information, such as dates and important events. |
| • Slower in processing information and answering questions.  
• Depletion in the ability to concentrate, in abstract thinking, and in recalling the required information.  
• Possibility of neurological changes like: confusion, disorientation, and forgiveness that can be the consequence of medicines. |

| C. Changes in muscular-skeleton, respiratory, and genital-urinary systems | 1. Give the information in an organized and structural manner.  
2. Stay alert to exhaustion signs, and do not extend the interview time longer than necessary. Take brief breaks for the respondent to rest and go to the bathroom, if he/she needs it.  
3. Ask for clarification or repetition of the answer if you don’t understand the given answer.  
4. Encourage the respondent to talk and give him/her enough time to articulate his/her answers. |
| • Depletion of muscular tone and articulations wear-off due to osteoporosis.  
• Depletion of blood flow to the lungs, causing difficulty breathing, and diminution of resistance.  
• Depletion in excretion efficiency that may cause urgency to leak, urinary incontinence and extremimiento.  
• Facial muscles difficulty, change in jaw articulations and dientaduras postizas that may cause improper verbal articulation or pronunciation difficulties. |
### II. Psychosocial changes

#### A. Attitudes and life styles

- Cautious reaction to new events, and uneasiness in changing their daily routines.
- Fear of crime and preoccupation with their safety (this feature is present in everybody, but pronounced in elder people).
- Fear of appearing unable due to their abilities depletion, for instance: fear of not answering as expected, shame for their physical appearance, and home.
- Styles and daily habits very rooted. Change in roles, due to retirement, widow(er)hood, or loss of loved ones, that may result in limiting social interaction, loneliness, or more free or leisure time. Some elder people tend to speak of their personal matters and talk too much, since there is little opportunity to do so.

#### Recommended actions

1. Devote more time creating a comfortable and trustworthy environment. Use a Photo ID.
2. Emphasize the objectives of the research, especially the confidentiality aspect.
3. Treat the respondent with great respect and courtesy. You must address the person as “Usted” (formal ‘you’ pronoun in Spanish), unless the respondent asked otherwise.
4. Give positive stimulus and encouraging expressions.
5. Help the respondent feel that his/her opinions are important and are contributing to society.
6. Try to not let the interview interfere with the habits and daily chores of the respondent. Breaking daily routines in elder people may cause uneasiness, and affect the validity of the answers.
7. Be aware of the respondent missing the point, and go back to question with care.

### III. Socio-cultural changes

#### A. Educational level

This age group usually has less education than any other. Women have less education than men.

#### B. Different generation

Some people grew old with the century, in a different historical and social context than today. Many are not familiar with the research methodology, nor the interview process.

#### Recommended actions

1. Use plain language. Avoid technicalities.
2. Explain the objectives of the research and what is expected from the respondent as part of this research.
3. Create a trustful environment during the interview.
4. Be aware of non-verbal communication.


### 2.5 RECOMMENDATIONS ON FILLING OUT THE QUESTIONNAIRE

For the best quality possible in the questionnaires you fill out, it is important to consider the following:
a) Use only pencil, writing with print letters with no abbreviations, nor overwriting, and very well done numbers.

b) To indicate the option(s), you must circle the answer or write the code number in the space provided, being cautious of not using the other option’s space, otherwise you may need to go back to the field.

c) Follow closely the instructions for each question, some are multiple-choice type, and in others you must ask what is most important for the respondent and mark a single option. Notice the skip patterns of each question. As it will be explained in detail later, another type of question in this instrument require that the line number of certain persons be recorded; this applies to household residents, non-resident children of the respondent, and deceased children. In order to do this it will be necessary to check against the rosters.

d) Read literally each question and repeat or make other additional questions when they are not understood. If you need to make an observation, indicate it with an asterisk (*) and write down whatever is necessary in the space provided at the end of the questionnaire. When the answer choices include the option “other, specify,” be as explicit as possible.

e) Adjust the sense and pertinence of the questions to the type of respondent. Consider if he/she is a widow(er), has never worked, does not have children, or lives alone. Keep in mind that this research contains questions related to health, family networks, and economic aspects of the individual and his/her spouse if they live in the same home.

2.6 SPECIAL CASES FOR COLLECTING MHAS

a) The selected person no longer lives in the house, but lives in the same colony, neighborhood, or locality and it is possible to locate him/her. In this case find out the address, and do the interview at the new home.

b) The selected person moved out of the colony, neighborhood, or locality, and it is possible to locate him/her. Find our the new address, and do the interview at the new home.

When these two changes occur, take note of the new address on the cover of the questionnaire and mark the box “change of address,” option 2.

c) The selected person moved out of the colony, neighborhood, or locality and it is not possible to locate him/her. Then mark D.14 on the no interview sheet and find out the new address if possible, write it down on the reverse side of this sheet to save this interview for the other wave of this survey.

d) The selected person died, but the spouse is alive: if the surviving spouse is 50 years or older do collect the questionnaire, if the surviving spouse is less than 50 years old don’t collect the questionnaire, and mark D.17 in the no interview sheet.
If the widowed spouse complies with the age requirement (50 years) and has married or united with someone again, conduct the interview with the widow(er) as the selected person and his/her new partner as spouse.

e) The selected person died and he/she didn't have a spouse or the spouse is no longer living: mark D.16.

f) Selected person and/or spouse is temporarily absent: When the selected person is single (with no spouse) and is temporarily absent but lives with another relative or other person who is an adequate informant, conduct the interview with a proxy.

If it is a selected person with a spouse, and the selected person is absent but spouse is present, conduct the first interview with the spouse, and conduct an interview by proxy for the selected person. If both, selected and spouse, are temporarily absent and an adequate proxy lives in the dwelling, conduct interviews by proxy for both.

The collection of interview by proxy must be made, in these cases, with strict authorization of the supervisor.

g) Selected person and spouse temporarily absent and there is not an adequate proxy: Do not conduct the interview and mark D.18 on the no interview sheet, clarifying the situation on the back part of that sheet.

h) Selected person and/or spouse not apt for the interview: This situation occurs when, for health reasons, the selected person or the spouse is not able to do the interview directly. In these cases use a proxy for the selected person and/or the spouse respectively.

i) Selected person not apt for the interview, and no adequate proxy: When the selected person is not able to do the interview directly for whatever reason, for instance he/she is deaf, and no adequate substitute is found, DON'T do the interview and mark D.15 in the no-interview sheet.

j) The selected person refused to give the information, but authorized a relative to do the interview: Use the proxy questionnaire; verify that this person is an adequate proxy.

k) The selected person refused to give the information and didn't authorize a proxy. Remember that you should do your best to get the interview. In this case mark the option A.4 in the no-interview sheet, as long as it is the case of single household interview, or if it is a couple but both refuse to do the interview. If it is a couple interview and one of them refuses, indicate this on the cover of the second interview.

l) By mistake of ENE or ENEU, the age of the selected person has been incorrectly recorded and does not comply with the selection criteria (being 50 years or older). You must only collect the information if the person is at least 40 years or older at the time of the interview. Collect the information from the spouse if he/she is available. If the selected person does not comply with the criteria, mark D.19 on the no-interview sheet and specify the reason.
m) When the selected person is deceased and the spouse is 50 years or older, use the space provided for spouse, leaving blank the line of selected; in question 6 about kinship with the selected person, write down the code “66” for all habitual residents of the household.

This last observation is applicable also for question B6 of the TR Non-resident Children
2.7 CHART OF COMPLETE AND INCOMPLETE INTERVIEWS

Due to the questionnaire application design we can have two types of outcomes in the interview:

- Complete and incomplete

To define each of these types of interview the following chart is presented:

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<td>Selected</td>
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<td>Selected by proxy</td>
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<td>Selected by proxy incomplete</td>
<td>Selected by proxy incomplete + Spouse</td>
<td>Selected by proxy incomplete</td>
<td></td>
</tr>
<tr>
<td>Selected by proxy incomplete + Spouse</td>
<td>Selected by proxy incomplete</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Selected + Spouse by proxy incomplete</td>
<td>Selected + Spouse by proxy incomplete</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Selected + Spouse by proxy incomplete</td>
<td>Selected + Spouse by proxy incomplete</td>
<td></td>
<td></td>
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<tr>
<td>Selected + Spouse by proxy incomplete</td>
<td>Selected + Spouse by proxy incomplete</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Selected + Spouse by proxy incomplete</td>
<td>Selected + Spouse by proxy incomplete</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Selected with no interview</td>
<td>Selected by proxy + Spouse with no-interview</td>
<td>Selected with no interview + Spouse</td>
<td></td>
</tr>
<tr>
<td>Selected with no interview + Spouse</td>
<td>Selected with no interview + Spouse with interview</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2.8 RULES FOR COLLECTING COUPLE INTERVIEWS

1. When the selected person has a spouse in the household apply the interview to the first contacted person of the couple, either selected or spouse.

   Previous survey experience shows that housewives provide more information. For this reason, the questionnaire was design so the information about the family will be given by the women, who generally are better informed on these issues, while men take care of economic issues. However, due the survey logistics, it is recommended that the first person contacted answer the first interview, regardless of gender, or if it is the selected person or the spouse.

2. When conducting a couple-interview, meaning selected person and spouse, if any of the two uses a proxy, ALWAYS conduct the direct interview first and
then the proxy-interview, regardless of whether the first interviewed be the selected person or the spouse.

3. When both interviews are conducted with proxies, the TR-habitual residents, TR-Children (section B), and the section on Help and Children (section G) will be filled out only for the first interview. In order to facilitate this, Interview Control Sheets are included in the questionnaire.

3. ACTIVITIES AFTER FIELDWORK

It is recommended that before turning in your workload, you review all the questionnaires. In particular, make sure each section of the questionnaire is completed in the case of couple-interviews. Make sure that the identification of both members of the couple is correct. Once the material is reviewed, you will sort the materials by control number progressively, and you will deliver them to the supervisor. Later on, he/she will inform you if there is a mistake.

4. THE QUESTIONNAIRE AS INSTRUMENT FOR CAPTURING INFORMATION

This chapter describes the questionnaire as the interviewer’s main tool. We want to know and identify the main elements that it embodies, their function, and how are they to be used.

First we present a general scheme of their structure, aiming at giving a global view. Afterwards, we describe each of its parts (sections and observation sheets).

4.1 Structure of the information collection instrument

The questionnaire provides space for two interviews, and contains the following parts:

- Questionnaire cover
- First interview cover
  - First interview sections
  - First interview observations sheet
- Second interview cover
  - Second interview sections
  - Second interview observations sheet
- Information for future contact

Each part contains several sections, which are shown in Table 1.2, so you can identify them and get to know their functions:
### Table 1.2 Instrument for Information collection structure

<table>
<thead>
<tr>
<th>Parts</th>
<th>Sections</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cover</td>
<td>1. Geographic identification</td>
</tr>
<tr>
<td></td>
<td>2. Questionnaire control</td>
</tr>
<tr>
<td></td>
<td>3. Home address</td>
</tr>
<tr>
<td></td>
<td>4. Home change</td>
</tr>
<tr>
<td>First interview cover</td>
<td>1. Interview number</td>
</tr>
<tr>
<td></td>
<td>2. Name of interviewed person</td>
</tr>
<tr>
<td></td>
<td>3. ENE line number</td>
</tr>
<tr>
<td></td>
<td>4. Respondent code, date, and number of visits.</td>
</tr>
<tr>
<td></td>
<td>5. Language or dialect</td>
</tr>
<tr>
<td></td>
<td>6. Interview result</td>
</tr>
<tr>
<td>First interview thematic sections</td>
<td>Household residents section</td>
</tr>
<tr>
<td></td>
<td>Section A. Demographic data</td>
</tr>
<tr>
<td></td>
<td>Section B. Non-resident children</td>
</tr>
<tr>
<td></td>
<td>Section C. Health</td>
</tr>
<tr>
<td></td>
<td>Section D. Health services</td>
</tr>
<tr>
<td></td>
<td>Section E. Cognitive exercises</td>
</tr>
<tr>
<td></td>
<td>Section F. Parents and help for parents</td>
</tr>
<tr>
<td></td>
<td>Section G. Help and children</td>
</tr>
<tr>
<td></td>
<td>Section H. Functionality and help</td>
</tr>
<tr>
<td></td>
<td>Section I. Employment</td>
</tr>
<tr>
<td></td>
<td>Section J. House</td>
</tr>
<tr>
<td></td>
<td>Section K. Pension, income, and assets</td>
</tr>
<tr>
<td></td>
<td>Section L. Anthropometric measures</td>
</tr>
<tr>
<td>First interview observations sheet</td>
<td>Legal basis</td>
</tr>
<tr>
<td></td>
<td>Observations</td>
</tr>
<tr>
<td>Second interview cover</td>
<td>7. Interview number</td>
</tr>
<tr>
<td></td>
<td>8. Name of interviewed person</td>
</tr>
<tr>
<td></td>
<td>9. ENE line number</td>
</tr>
<tr>
<td></td>
<td>10. Respondent code, date, and number of visits.</td>
</tr>
<tr>
<td></td>
<td>11. Language or dialect</td>
</tr>
<tr>
<td></td>
<td>1. Interview result</td>
</tr>
<tr>
<td>Second interview thematic sections</td>
<td>Section A. Demographic data</td>
</tr>
<tr>
<td></td>
<td>Section C. Health</td>
</tr>
<tr>
<td></td>
<td>Section D. Health services</td>
</tr>
<tr>
<td></td>
<td>Section E. Cognitive exercises</td>
</tr>
<tr>
<td></td>
<td>Section F. Parents and help for parents</td>
</tr>
<tr>
<td></td>
<td>Section H. Functionality and help</td>
</tr>
<tr>
<td></td>
<td>Section I. Employment</td>
</tr>
<tr>
<td></td>
<td>Section J. House</td>
</tr>
<tr>
<td></td>
<td>Section K. Pension, income, and assets</td>
</tr>
<tr>
<td></td>
<td>Section L. Anthropometric measures</td>
</tr>
<tr>
<td>Second interview observation sheets</td>
<td>Legal basis</td>
</tr>
<tr>
<td></td>
<td>Observations</td>
</tr>
<tr>
<td>Future contact sheet</td>
<td>Information for future contact</td>
</tr>
</tbody>
</table>

4.1.1 COVER

Concentrates the basic information of geographic location, control number, selected person’s name, home address, name and code of interviewer,
supervisor, and coder, and a space to indicate if the selected person changed domicile.

4.1.2 FIRST AND SECOND INTERVIEW COVER

Questionnaire covers have been designed with two different colors to facilitate the handling of material in the field. One color is for the first interview, and other for the second one.

Contents and completion instructions:

Interview basic number: This field does not require any information, since it is for coding purposes.

1. First name, last name, mother’s maiden name: You must write down the name of the person giving the interview first or second, regardless of being the selected person or the spouse.

2. ENE line number: write down the line number that this person has in TRH of ENE or ENEU. If the person is not registered in TRH of ENE/ENEU, write down code 66, which indicates this is a new person in the household.

3. Respondent code: Circle the corresponding code indicating with whom you are conducting the first or second interview; 1 for the selected person and 2 for the spouse.

3.1 Interview date: Write down the day and month in which you are doing the interview.

3.2 Number of visits to get the interview: This number corresponds to the total number of visits that you had to make in order to get the interview. Consider when you must interrupt the interview for any reason and are asked to come back later or any other day.

4. Language or dialect of the interview: Circle the code of the corresponding answer.

- Spanish: You conduct the interview in this language.
- Translation by someone outside of the household: If you use someone outside of the household to translate for the respondent, select this option.
- Translation by a household member: If you use a household member to translate for the respondent, select this option.

5. Interview result: In this field you must circle the option corresponding to the result obtained when conducting the interview. For the first interview there are
only two possible outcomes, adding to the four reasons for not conducting the second interview.

- Complete (01): Select this option; if respondent does the whole interview, that is, he/she answers all the sections in the questionnaire.
- Incomplete (20): Select this option, if respondent refuses to continue with the interview, but he/she has answered more than one section, taking note of the last complete section the respondent answered.

CODES FOR NO-INTERVIEW IN SECOND INTERVIEW

- Second interview was denied (21): Use this code when first interview has been conducted, but, for whatever reason, the second interview is denied.
- Selected person died and spouse is 50 or older (22): In this case there is no second interview, since the widow(er)(er) already gave us the second interview.
- Absent without proxy (23): The person with whom the second interview must be conducted is temporarily absent and it is not possible to contact a proxy.
- Not apt without proxy (24): When the person with whom the second interview must be conducted is present but not able to answer (i.e. health, alcoholism, etc.), and it is not possible to contact a proxy.

4.1.3 QUESTIONNAIRE SECTIONS

The questionnaire is the substance of MHAS 2001, because it is the complete list of questions about houses, households, and the characteristics of the group of interest.

Each questionnaire has the capacity to hold the information of one couple: the selected person and his/her spouse, if he/she lives in the household. This means that in the cases where the selected person is married or united, and the spouse lives in the same household, the two interviews from the questionnaire will be filled out.

4.2 INSTRUCTIONS FOR CONDUCTING INTERVIEWS

4.2.1 SINGLE-HOUSEHOLD INTERVIEW

In the case of an interview with a single person without a partner, the first interview will be fully conducted; this means, all the sections will be asked.

4.2.2 COUPLE-HOUSEHOLD INTERVIEW

In the case where two interviews are conducted in the household (one to the selected person and another to the spouse), both interviews from the
questionnaire will be completed. It is important to point out that for the order of the interviews, it does not matter who is the selected person between the two; that information is only valuable when coding the identification key in each of the interviews.

It is recommended that the first interview be conducted with the one who know more about the children and family networks of the couple. In most cases this will be the woman.

**Filling out the list of household residents and the information about the children**

In the case of a couple-household interview; certain sections have only been included for the first interview. Therefore, the first interviewed person of the two will be whoever fills out: a) the list of household residents, b) section B, including the list of non-resident children, and c) section G about help from and to the children. This is because certain information may be required from these sections to fill out subsequent sections of the first or second interview. Specifically, it is necessary to know the line-number assigned to each household resident and to each non-resident or deceased child; and this information is asked in this question.

**Filling out Sections J (House) and K (Income, Pension, and Assets)**

These two sections address economics aspect of the couple. In most cases, the man will be the most adequate person to answer this kind of question. It is hard to predict, however, who is the most adequate for every case. For this reason an Interview Control Sheet is used immediately before Section J of both interviews, in order to ask each respondent if he/she feels more able than the spouse to give this kind of information. Then we proceed to collect the information, which is always registered in the space provided on the first questionnaire. To summarize, when the two interviews are finished, the interviewer must have one questionnaire containing two fully answered interviews.

The following table summarizes the different possibilities to be found in a particular household, whether it be selected person with spouse, without spouse, or proxy.

<table>
<thead>
<tr>
<th>Single Interview</th>
<th>Couple Interview</th>
</tr>
</thead>
<tbody>
<tr>
<td>Normal</td>
<td>Normal</td>
</tr>
<tr>
<td>Sick</td>
<td>With Sick Spouse</td>
</tr>
<tr>
<td>Interview 1</td>
<td>Interview 1</td>
</tr>
<tr>
<td>Interview by proxy</td>
<td>With 2 sick spouses</td>
</tr>
<tr>
<td></td>
<td>Interview by proxy</td>
</tr>
<tr>
<td></td>
<td>Interview by proxy</td>
</tr>
<tr>
<td></td>
<td>Interview by proxy</td>
</tr>
</tbody>
</table>
4.3 GENERAL FILLING INSTRUCTIONS

Notice that the questionnaire is designed to register the information from two interviews, for the case of couple-households. It will be necessary to use more than one questionnaire when the number of lines provided is not enough to write the household residents or non-resident children, because these are more than 19. When using the other questionnaire don’t forget to write down the ID numbers on the corresponding cover.

The following instructions summarize the aspects to consider when filling out the questionnaire.

- The questionnaire is filled out at the time of conducting the interview at the selected household.
- Write clearly with uppercase print letters, with no abbreviations, and without invading the space provided for numbers or other annotations.
- Numbers must be clearly written, legible, and with digits in the corresponding spaces. Fill them out from right to left, using only one number per space and writing zeros in the unused spaces.
- When making corrections in any part of the questionnaire, do not erase or scratch out the mistake; you must completely cancel it with two horizontal lines and, depending on the available space, write the correct and complete answer above or to the side (without invading other lines or columns).

Taking into account these general instructions will facilitate reading the information, and any latter revision, supervision, validation, and capturing.

4.3.1 TYPES OF QUESTIONS

The questionnaire has three basic types of questions; the design of the question corresponds to a particular way of phrasing them.

1. Questions that are read verbatim to the respondent, along with the possible answer choices. For these questions the answers are written in LOWERCASE, and at the end of each choice there is either a question mark or ellipses.

2. Questions in which answer choices are not read to the respondent. They are just a help to the interviewer for capturing or refereeing the answer given by the respondent. These are characterized by a question mark at the end of the question, and the answer choices are written in UPPERCASE.

3. Open questions where no answer choices are given.

The strategy for asking the questions is as follows:
– Ask all the questions in the questionnaire according to their instructions.
– Read verbatim the questions, clearly, slowly, and loudly.
– Follow strictly the question sequence and skip over patterns.
– Truthfully write the answers given by the appropriate respondent, according to the instructions for writing the answers.
– Follow the instructions given in the boxes on the questionnaire.

4.3.2 IDENTIFYING APPLICATION INSTRUCTIONS

The questionnaire contains different types of instructions for asking the questions, which indicate the strategy to be followed during the interview.

The instructions can be identified in the questionnaire as follows:

– They are integrated in the boxes.
– They are implicit when written in UPPERCASES.

All the instructions are for the sole use of the interviewer, therefore they must not be read to the respondent.

4.3.3 TYPE OF INSTRUCTIONS FOR ASKING THE QUESTIONS

The following instructions will make your job easier, because they help to get the answer from the respondent, and show where to correctly write the answer. Moreover, they allow you to optimize the interview time and to make it successful.

The questionnaire has different types of instructions to ask the questions. They are explained in the following paragraphs according to their function.

Text between parentheses

The word in the parentheses must be substituted with the information given by the respondent: (mention the service), (total number of persons), (name), (name of head of household), (age), (entity of the interview), etc.

Skip pattern instructions

PASS TO or GO TO takes place as a consequence of the respondent's answer. This means, if the answer matches a code where the box PASS TO or GO TO is located, closely follow that instruction and continue where indicated. Therefore, PASS TO or GO TO shows you the questions that are not to be asked. Following the instruction PASS TO or GO TO assures a logic sequence and a coherent interview.

Reading the questions and the choices
As we mentioned before, questions must be read verbatim and according to the choices format. You must know if you are to read the choices to the respondent or just wait for an answer. When you must read the choices (the answers will be written in lowercase), read them all until the respondent gives an affirmative answer.

**Writing down the answers**

Indicates what to write and where to do it. Usually, you will need to write the corresponding codes or numbers to the questions in the indicated spaces, or circle the answer where necessary.

**Verifying and correcting the information**

Indicate for which questions the information must be verified and/or corrected.

**Sequence direction (arrows)**

This instructions show in a graphic manner, through arrows, the direction or sequence of the interview.

**VERTICAL ARROW**

Indicates that when formulating a question in a list or box, the answers are to be written in a descending-vertical direction.

**HORIZONTAL ARROW**

Shows the question sequence for the same person in the list. For instance, in the list for habitual residents, the questions must be made in a horizontal manner; that is, you keep asking the question until reaching an age break, house condition, etc. When you finish asking the questions to each person in the list, you will find that the last question has no arrow or an indication that says “go to the next person.”

**Answer choices in correspondence with an instruction (key)**

The key indicates a set of answer choices corresponding to other instructions shown in the box; these instructions may include, among others, skip question, section, person, annotation, etc.

**Answer choices according to residence condition, children, and/or age break**

These instructions are located in the top part of the registration lists. They show who should answer certain questions according to his/her relation with the person providing the information (children living in the same household, non-
resident children, or deceased children) and the age of the individuals to whom
the questions are directed.

Procedural instructions and asking questions

These instructions explain the procedure to ask the questions according to the
respondent characteristics. Read carefully the boxes that contain indications on
how to apply the questionnaire when conducting the interview. Remember that
depending on the respondent, whether it is a single person or a couple, the
dynamics for applying the questionnaire are different.

4.3.4 BASIC FORMS OF WRITING DOWN ANSWERS

The following recommendations are quite useful, they show the correct way to
write down the respondent’s answers in the questionnaire. The four basic forms
of writing down the answer are four:

Circle the answer code

This form has ways of being written.

a) When the question indicates that only one answer is acceptable

Circle only one code that corresponds to the answer given by the respondent.
Avoid covering the number when circling it, or invading other code.

When correcting a mistake, cancel with two horizontal lines, and circle the right
code.

Only one answer is accepted for this question, therefore there must be only one
circled code.

b) When the question indicates that more than one answer can be accepted
(multi-answer), circle the codes corresponding to the questions given by the
respondent. Avoid covering other codes when circling. These questions accept
as many codes as the corresponding instruction indicate.

For making corrections, follow the stated procedure.

Writing down numbers declared by the respondent

Write down the numbers declared by the respondent, filling them in from right to
left, in each box write only one number and write zeros in the unused ones.

To avoid illegibility when capturing the information, numbers must be clear in
order not to be misinterpreted, altering the respondent’s answer.
To correct a mistake, cancel the error with two horizontal lines and, on top write the correct and complete number(s) or figure.

Writing down verbatim the answer given by the respondent

Write in the corresponding line and space the answer given by the respondent, with clear uppercase letters, and with no abbreviations.

For making corrections, follow the stated procedure.

Writing down the answer code

Write in the space, in a clear and legible way, the code corresponding to the answer given by the respondent.

For making correction, follow the stated procedure.

Kinship and registration number

When asking for the name and registration number of someone who received or gave some benefit or help, you must write down the name and registration number of this person if you registered it in some Household Roster or even in the space provided by deceased children. If the person isn’t registered in any of the lists, you must write down the name and registration number of the children with whom the relationship exists. For example:

1) Luis, with registration number 104, is the selected person’s grandson and helps him economically.

<table>
<thead>
<tr>
<th>Name</th>
<th>Registration Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Luis</td>
<td>104</td>
</tr>
</tbody>
</table>

2) César, Norma’s husband (Nonresident daughter with registration number 205) helped the selected person economically.

<table>
<thead>
<tr>
<th>Name</th>
<th>Registration Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Norma</td>
<td>205</td>
</tr>
</tbody>
</table>

Horizontal design of some answer spaces

When you find answer fields within the horizontal lines you must not skip any line, regardless of whether they are shaded or not (with the exception of TR-residents, spouse and resident lines). The lines were designed like this to guide the interviewer when writing down the answers; they are not spaces for the coder. Examples of these lines are in questions H.21 to H.25.
**Additional household registration**

When within the house where the selected person lives there are more households, do not consider them as residents of the house, even if they are children of the selected person or his/her spouse. These children must be recorded in the Non-resident roster, using B.18, the option “lives in the same house or building.”

Remember that you will only capture the children in section B and not the members of additional households.

**DON’T KNOW AND DON’T ANSWER OPTIONS**

Write down the don’t know option when the respondent was definitely unable to give you an answer, either because he/she doesn’t know, or he/she has forgotten.

The don’t answer option is written down when the respondent refuses to answer the question.

**4.4 OBSERVATIONS SHEET**

The observations sheet is located at the end of each interview. It is comprised of two sections:

- Legal basis
- Observations

These are described as follows:

**Legal basis**

It has two boxes, one concerning CONFIDENTIALITY and the other concerning the mandatory nature of the research.

They describe the legal basis that support MHAS 2001, and they are read only upon request of the respondent, or when he/she shows resistance to providing the information.

**Observations**

This section is used mainly by the interviewer and supervisor; and it is located on the last page of each interview.
− The interviewer may use it for writing down anything that clarifies any special or problematic field situation, or for some doubtful or confusing answers provided by the respondent.
− The supervisor may use it for verifying information in the field, for re-consulting and collecting pending information. Also, he/she may use it when he/she finds errors or inconsistencies in the questionnaires where you wrote down the information and they merit going back to the field (re-consulting). This is the result of supervising the quality of the information through validation.

To denote and record the observation, proceed as follows:

In the boxes for answer choices

Write down an asterisk (*) when it is the case of a doubt or confusion in any of the answers provided by the respondent, in any section.

On the observations sheet

For clarifying the doubtful or confusing answer given by the respondent, write down the letter for the thematic section, the question number, and a brief explanation and/or description of the situation.

4.5 INFORMATION FOR FUTURE CONTACT

In the last part, at the end of the two interviews contained in the questionnaire, the respondent is asked to provide information about someone not living in the household, in order to contact the persons living in the household in case there is a change of address. The information required is for someone who will know how to locate the respondent(s) in case a follow up questionnaire is applied in the future.

If there is doubt about the use of this information, assure the respondent that this information is use for the sole purpose of this research. Remember that the research has as goal: to study the way health and well being change for people as they grow older, and therefore it is of interest to know changes in the future. In this sense, the information will only be used in case there is a change of address and there is a need to interview the person again.

5. THEMATIC QUESTIONS OF THE QUESTIONNAIRE

In this chapter, we explain in detail each of the thematic sections included in the questionnaire. In each section, the general objective of that section is presented, as well as the questions, the instruction for asking them, how to write down the answers, and the description of each of the answer choices.
5.1 CONSIDERATIONS FOR ALL SECTIONS

Here is a summary of various aspects of the MHAS questionnaire, which are common to the whole questionnaire.

Starting and finishing time

At the beginning of each section, the interviewer is asked to write down the start time. Also, at the end of each section the finishing time must be written down. This information will be collected during specific weeks of the fieldwork, when the field supervisor indicates to do so. These annotations are important for future research, because they allow the duration of the interview to be estimated, and which sections take longer than planned.

Rosters

Rosters are presented in a bigger sheet easy to locate in the booklet of the questionnaire. It starts, usually, with a list of people, followed by a series of questions about each person on the list. These lists are completed in the first interview of the questionnaire. This survey has the following registration lists:

- a) Household residents, in the section Household Residents in the first interview.
- b) Non-resident children, in section B of the first interview.

The purpose of the rosters is to facilitate the handling and filling out of the information; besides, they will allow the sequence of the interview to flow well. Rosters also have the following specific goals:

- It helps you avoid involuntarily skipping lines and writing down information for the wrong person.
- It helps you keep the line number of the household residents and non-resident children handy, which will be required in several sections of the questionnaire.

In practical terms, you must have the registration lists handy so you can consult them when needed without interrupting the interview.

Registration number for individuals

In several sections of the questionnaire, different individuals’ registration numbers are required: the household residents, non-resident children, or deceased children. These registration numbers are valuable to build family network models. In particular, in longitudinal or panel research, like MHAS, it is
crucial to follow the people who are part of the family network; therefore the registration numbers that identify people are important.

Two-year period

In some sections of the questionnaire there are questions about practices, behaviors, or activities that took place “during the two last years.” The reason for choosing this period of time is to maximize the comparison of the questions in this survey and future ones. It is expected that the visit to the respondents for the second MHAS panel will occur in approximately two years, and the future question will try cover the time between this MHAS visit and the future one. This means that in the future a similar question will be made asking “during the two last years.”

Approximate quantities

In several sections of the questionnaire questions are asked about dates, ages, number or years, monetary quantities, or number of hours or days. In most of the cases remember that the approximate number is enough. For this reason, the phrasing of the question includes sentences like “approximately,” or “around how many…”

Rescue questions for non-response

For questions where monetary quantities, number of hours or days of a behavior are asked, a series of rescue questions are used. When the respondent don’t even give an approximate quantity, these questions will serve to later impute a numeric quantity. Notice that this is a way of asking for categories different than those used in other surveys. A series of two consecutive questions are asked, instead of giving the categories or groups in one single question. The interviewer starts by asking if the quantity is more than an intermediate X quantity. If the answer to this first rescue is YES, then you ask if the quantity is more than a greater quantity (X + y). If the answer to the first rescue is NO, then you ask if it is bigger than a smaller quantity (X-z). Look, for example, at questions J.18 and J.19.

Multiple answers

When there is a place for only one option, and the respondent gives more than one answer, inquire which one occurred more commonly, more often, or with more quantity (defined by the respondent).

Evaluation of the respondent

The last question of each section explores if the respondent had trouble answering the previous section. This is a perception of the interviewer. If the
respondent asked for help to answer the question from a relative or household resident only occasionally, indicate “FEW TIMES.” However, if the respondent used help constantly, mark option 3, “most of, or all the time.” It is expected that the degree of help, if any, varies according to the type of question, and that’s the reason for asking this question.

5.2 HOUSEHOLD ROSTER FOR HOUSEHOLD HABITUAL RESIDENTS

The goal of this section is to capture information about the people that make up the respondent’s home. For this reason, it is important to distinguish habitual residents from others, and those who are part of the respondent’s home.

We consider habitual residents those who usually live at the household. These are the people who sleep there, cook their meals there, eat and protect themselves from the environment, and for these reasons they consider it their place of residence. Habitual residency in a specific place (house or shelter where one usually sleeps and/or eat) that the person has, and to which he/she can come back whenever he/she pleases, this is the place the person would give an answer to the question, where do you live?

Frequently, small children and older people are omitted in the declarations about household members. Emphasize to the respondent that these people must be included in the total count also, since it is extremely important to capture the whole population. It is important also to explain that besides the names, the information intended to be collected in this section corresponds to the rest of the household residents, and not him/her and his/her spouse (where applicable). These questions will be made later in the questionnaire. Don’t forget to include recently born babies who are not in the house because they are still in the hospital.

If one or more additional household lives in the house, you must not capture them as habitual residents of the household, since they are part of a different household. When a child of the selected person or his/her spouse are part of these additional households, capture only the children in the Household Roster of non-resident children (Section B).

Take into account the following indications to help the respondent when he/she has doubts about who should be considered as a household resident.

Habitual residents are:

1. All nationals or foreigners that habitually live in the house and live off of the out of a same expense, mainly to eat.
2. People, who for several reasons, are not usually in the house during the day, but sleep in the house most of the week.
3. Members of the household who have been absent for a time no longer than three months, counted from the day they took off until the last day of the week of reference.

4. The persons that were captured as temporarily absent during ENE/ENEU visit of the fourth quarter of 2000.

5. Temporal absentees, for more than three months due to study or work, as long as they live in a collective house or in their place of work or study (barracks, ship, hospital, lighthouse, etc.) or don’t have any other fixed place of individual residence, only the house under consideration. This is the case for traveling agents, railroad personnel, transporters, etc.

6. The people who arrive at the house during the week of the interview or earlier, with the intention to stay three months or longer.

7. People born during the week of reference or earlier.

8. The people who live in the house until the last day of the week of reference, even if during the week of the interview they permanently left the house for whatever reason.

The following are not habitual residents of the house:

1. People who have been absent from the sampled house more than three months for whatever reason and live in another particular house, even if they come back on weekends to visit their parents, and/or to rest. Bear in mind that these people do not sleep most of the week at the house. These people must not be written down on the TRH-residents.

2. People who have been absent from the sampled house more than three months for reasons other than study or work, like: health, legal issues, or they are not certain the will go back to their particular house, or they live in collective houses like jails, hospitals, monasteries, convents, health care facilities, etc.

3. Persons who only come to the house as temporary visitors with the intention of staying less than three months or are certain they will stay longer.

If doubt persists whether or not to include someone or not as an habitual resident, consider the following criteria:

- The friends, relatives, or students who pay for room and/or board must not be considered as members of the household, but as guests, since they are not sharing an expense.

- If there is doubt about one person, ask where he/she sleeps more days. He/she would be an habitual resident if he/she slept most of the time in the house where the interview is being conducted; otherwise he/she is not an habitual resident.

- Temporary absent persons, who are in collective house like jails, nursing homes, orphanages, etc., for three months or more, are not considered habitual residents. Instead, if the time of absence is shorter than three months, they are habitual residents.
People who arrive at the house as temporary visitors with the intention of staying less than three months, or are not certain about staying a longer period of time, are not considered habitual residents.

For the survey ends, the common expense is the part of the income that goes to pay food for the group of people (or one person) who comprise the household, and can be provided by one or several persons.

Sharing a single expense means to gather the individual contributions into a single budget for food of all people who are part of the household, including those characterized as being dependent: kids, elderly and students. If all people who live in the house eat from the same budget, this is a single household, regardless of how many people share the expense of the budget.

Guest and dwellers receive special treatment. For this reason, remember that if the respondent says there are guests or dweller in the house, it is necessary to identify how many there are. Write down an asterisk on question 3, and record the situation on the OBSERVATIONS sheet.

**Question 1. RESPONDENT CODE**

Write 1 if the respondent is the selected person by MHAS. Write 2 if the respondent is the spouse of the selected person.

**Question 2. REGISTRATION NUMBER**

This is used to identify each member of the household with a code and to locate, in the right line, the information about each person throughout the different sections of the questionnaire.

The registration list provides space for up to 19 people. When the household is comprised of more than 19 people, use another questionnaire to write down the remaining people. On the second questionnaire, write down the information about GEOGRAPHIC IDENTIFICATION, CONTROL OF QUESTIONNAIRE, and RESPONDENT; and leave blank the remaining spaces. Fill out only the corresponding information about additional household residents on the section HOUSEHOLD RESIDENTS.

Afterwards, modify the registration number of the people recorded on the second questionnaire, assigning a progressive number: 120, 121, 122 y and so on, until all the people in the household have a modified registration number.

**Question 3. HOUSEHOLD HABITUAL RESIDENTS: LIST OF PEOPLE**

The goal of this question is to list by name all the persons who usually live in the house and are members of the household. Besides, it helps the respondent to
remember all the people who comprised the household, and therefore avoid omitting any of its members.

Ask the question in a clear, paused, and complete manner; in order to get a precise answer immediately. It is important to add “don’t forget the small children and the elderly,” so the respondent won’t forget about them.

When the interview takes place in a house located in residential areas, remind the respondent to include the servants who live in the household, since it is possible that there is domestic personnel among these people.

Write down the first name on the first line, and don’t leave blank lines between names.

When writing down the names, it is important to always start with the selected person, followed by his/her spouse IF IT IS THE CASE, followed by the children who reside in the same household. This must be recorded in the following way: first, children who are single, then married children with their respective wives and children. This must be done in a descending way, starting with the oldest child and finishing with the youngest. Finally, the other relatives finishing with the non-relatives of the respondent. It is recommended that the declaration of people be in descending order, according to ages. This allows for greater control of the interview.

When writing the names on the list, don’t include the last name, except when a first name is repeated. In this case, write down the last name of each person, in order to distinguish them when asking for individual information.

If you make a mistake writing a name, remember to cancel it with two horizontal lines, and write down the correct information on the same line.

For a newborn without a name, write: NEWBORN, and refer about him/her in this way in the remaining questions.

Bear in mind that we only want listed the persons who usually live in the house and are members of the household, therefore, if the respondent informs you that someone does not live there, don’t write that person’s name on the list.

If by mistake you write down the same person twice, cancel out one of the lines throughout the section. Mark with an asterisk and explain the situation on the OBSERVATIONS sheet.

After making sure that you have registered all the household members, ask the remaining questions of the section.

**Question 4. ENE-2000 REGISTRATION NUMBER**
The goal of this question is to associate the information given about each person during ENE with the information obtained with MHAS.

This information is not asked to the respondent. For each person, take the number from the line Habitual Residents Card (TRH) in the National Survey on Employment-2000 (ENE-2000).

If someone on the list is not registered on the TRH of ENE-2000, write down code 66, which indicates that this is a new person in the household.

As you may notice, all the questions about the resident members of the household are consolidated in this section. For this reason, you must ask the questions following each household member’s line. Once all the questions applicable to a particular member have been made, you will go on to the next line that corresponds to another member.

**Question 5. SEX**

By sex, we understand the biological condition that distinguishes persons between men and women.

Ask the question, even if it seems obvious, and write down the corresponding code, according to the sex of the person about whom you asked.

When asking the question for each person, use affirmative tone if the name does not leave room for doubts. If the name can be used either for man or woman, for instance: Guadalupe, Rosario, Inés, Asunción, Refugio, Concepción, Nazareth, Abigail, Jesús, Soledad, Cristián, among others, ask explicitly: male or female?

**Question 6. KINSHIP WITH THE SELECTED PERSON**

The goal of this question is to identify the kinship of each household member WITH THE RESPONDENT, this is, the selected person by MHAS.

Kinship is a connection or tie that exists between the household members and the SELECTED PERSON, regardless of its nature: blood, in law, adoption, affinity or custom. As mentioned before, kinship relations come from blood (parents, siblings, cousins, children, grandparents, etc.), spousal (spouse, lover, etc.), adoption (adopted child), affinity (brother in law, son in law, father in law, etc.), or custom (godfather, etc).

When they answer the word partner to kinship, inquire if they are referring to a couple relationship. If this is the case, register it that way. If kinship refers to a different situation like work partner, study partner, roommate, and so forth, consider it as no kinship.
People without kinship relation to the SELECTED PERSON establish living arrangement relationships because they are habitual residents of the house, and they share with the household members the expenses for food, for example friends.

If it is not easy to determine the kinship relationship between the selected person and a particular one, write whatever answer the respondent gives. The kinship must not have proper names and must always be established regarding the selected person. For instance: brother of the wife of the selected person, nephew in law of the selected person, etc.

When in the household people rendering a service live, write down the occupation that is being done at the household, for instance: maid, babysitter, gardener, chauffeur, etc. The same situation applies with the relatives of such servants. In all these cases (maid’s son, chauffeur’s wife, etc.), consider them as non-relatives.

If in the list of people of a household a guest or tenant is presented as a relative, register him/her as non-relative, and continue registering that person’s information.

**Question 7. KINSHIP WITH THE SELECTED PERSON’S SPOUSE**

The goal of this question is to identify kinship between household members and the SELECTED PERSON’S SPOUSE.

The indications for filling out this question are similar to those in the previous question (KINSHIP WITH THE SELECTED PERSON), except that they refer to kinship with the selected person’s spouse.

Once you have established kinship with the respondent for each household resident, proceed to circle the line number of the children living in the household. This indication will help you determine later who to apply question 13 and on.

If the respondent has no spouse, write 00 in this question.

**Question 8. AGE**

The age of the individuals that are part of the selected person’s household determines the possible attention and care that he/she may receive or the potential demands for attention of the interviewed person. It is important to have this information. The age of each person will allow us to decide if subsequent questions should be asked. Questions 9 to 12 are only asked to individuals 12 or older. Question 13 and on are only asked to children 12 or older.
The age of someone is defined as the number of years from birth to the moment of the interview.

Read the whole question, mentioning the name of the person. If respondent answers he/she doesn’t know, help him/her so he/she can give you an approximate age; remember that there must be an answer.

To figure out the person’s date of birth, you subtract the year of the person’s birth from 2001 (present year). For example:

Juan was born in 1969, therefore he is 32 years old (2001-1969 = 32). Another necessary aspect is the month of birth; in order to know whether or not the person has already turned to the age resulting from the subtraction, you follow the previous example. Juan was born in January and the interview is taking place in May, which means he has turned 32 already. Therefore, the answer to the question is 32 years. On the contrary, if the month of birth was December, the answer will be 31 year. Write 31.

When the individual is less than one year old, write zeros in the space provided for age.

Be cautious that the respondent mentions the age in complete years and not years to complete. If the answer is “almost 38,” make it clear by saying: this is: he/she is 37 years old.

You must consider that people usually say the age they will turn to, and not the age they already are. When they answer: “around 38,” inquire for the completed years, asking if this means 37 or 38.

If a person does not remember his/her age, use some life landmark (marriage, son’s date of birth, grade in school, etc), or ask him/her to show you his/her driver’s license, birth certificate, official ID, or any other document where the date of birth is printed. When they show you their voter’s ID, don’t take the age directly, since this document was issued years ago. To get the information, identify the year and month of birth from the voter’s code, which corresponds to the first four numbers after the letters, and take into account the date of the interview.

Example:
The voter’s code on the ID is ABCDEF73020709M000. The first 6 letters correspond to the name of the person, the following six numbers his/her date of birth. This person was born on February 7, 1973. Hence, at the time of the interview, in May 2001, this person is 28 years old (2001-1973). You must write down 28.
You may use 99 after several attempts to find out the information through different ways unsuccessfully. Bear in mind that the idea is to get an answer as close as possible to the real age, since it is better some information with some margin of error than a DON’T KNOW as answer.

Notice that questions 9 to 12 are only applicable to residents 12 or older.

**Question 9. EDUCATION**

The question has two parts, which capture, first the level, and second the degree of instruction, within the National Education System or its equivalent (for foreign studies cases).

In the second part of question 9 (schooling level) we capture the number of years approved within the level that was reported in the first part of question 9. Your must bear in mind that we will only consider the grades or years approved, and these are written down in the column “GRADE”. In the column “LEVEL” you must register the code corresponding to the educational level.

Instruction level is defined as the highest year (grade) of study reached (finished and approved) by a person, within one of the levels of the National Education System (or its equivalent).

This is the list of levels:

- Elementary Education Level
- Secondary Education Level
- High School Education Level
- Basic Normal Level
- Technical or Commercial Career Level
- Professional Education Level
- Graduate Level

**None.................................................................0**

Write down zero in grade and level when the person is if first grade of elementary, or declares having attended school at this grade, but didn’t finish, failed, or no longer studied.

**Elementary.......................................................1**

You must write down this number when the persons declared having attended school and finished any grade (from 1st to 6th) in elementary.

When asking “did you make it to … grade in elementary,” it is important to precise if the mentioned grade was completely finished and approved, or /she
quitted school at that grade, or failed. EXAMPLE: The expression: “You passed to fourth grade” means that the person will enter fourth grade, and hence he/she has three approved grades of elementary.

For people stating that they have finished the six grades of elementary in less than six years, and obtained an elementary certificate because it was structured that way, consider this as having finished elementary and write down 6 grades and 1 in level.

When the person had concluded elementary in less than the required years because he/she studied in an open adult training system, and approved all the grades, register 6 in grades an 1 in level.

Write down the code 1 in level (elementary) and the last year attended and approved in grade.

**Secondary**.............................................................2

This code is for individuals who have approved any of the grades of this level, in general secondary schools, as well as in technical schools, or tele-secondary schools.

When the person declares having studied secondary in an open system or adult education system, make the equivalence to three years, this is, if he/she completed it in one year, write down 3 in grades and 2 in level.

In the case of people with disabilities (cerebral paralysis, mental problems, and so forth), who have approved years of elementary or secondary in special education schools, write down the approved grades and the level in the corresponding space.

**Commercial or technical career**.......3

This classification refers to studies in commercial or technical careers that qualify the student as a technician in the field once he/she is done with training.

The Mexican formal educational system offers basically two schooling options for those aiming at studying careers at the technical level: of bivalent or simultaneous character, and terminal character.

-Bivalent or Simultaneous Studies: They are all studies done at the same time and in the same school; it is the case of those people who study simultaneously, and in the same school, the middle or high school and a technical career. This kind of education is found mostly in public institutions, like CBTIS, CBTAS, CECITS, CETMAR, etc., so when they finish school, students receive high school in a technical field.
- **Terminal studies**: they are all studies in which the student did technical training after having approved elementary, secondary, or high school. This is the case of degrees known as “commercial” or “short.”

In the case of terminal studies, you must be careful when registering them, because the get confused with work training courses, and with studies done for other reasons. The duration of this course is generally shorter than one school year: days, weeks, even months; while studies done in the schooling system usually last the equivalent of three years of study. The latter are taken as technical or commercial careers.

The CONALEP (National School for Technical Professional Education) and CETI (Center for Technical-Industrial Training), are training institutions that form mid level technicians; don’t consider them as high school level. When someone has this kind of education, write down the approved in year in GRADE and the level number 3 (technical career).

**High school**.................................................................4

Anyone that has approved any grade in high school is considered.

The following are the educational centers that offer equivalent studies to high school:

- School of Bachelors
- School of Science and Humanities (CCH)
- High Schools

If the person finished high school in two years, and has or can ask for a certificate, write down 3 in grade and 4 in level.

**Basic normal** .............................................................5

This option captures the information from people who went to Basic Normal, which requirement for admission was to have finished secondary school. If the requirement for admission was high school, then it must be considered as professional level and write down option 6.

When the respondent answers basic normal studies and high school without any further study, ask him to select one and register the grade an level in the corresponding spaces.

**Professional**.............................................................6
It includes people with undergraduate studies, done in universities, colleges, polytechnical schools, and other higher education institutions, public or private, which requirement for admission is high school.

Studies done at CETAS (Technological Studies Center in Subaquatic Activities), and in certain Unitec (Technological Universities) are not considered in this level, even though the admission requirement is high school and they prepare higher technicians, they do not give a major certificate. If the respondent mentions any studies at these institutions, register the approved years under technical career. People going to the Unitec in Mexico City must be considered as professionals, and you must register the approved years under this option, after verifying that they hold or expect to receive the undergraduate or engineering degree.

When the respondent answered that he/she has undergraduate degree (career) finished, but doesn’t know how many years have been approved, write 4 in grade and 6 in level.

If a case arises where high school or undergraduate studies are divided into quarters or semesters, make the conversion to the calendar year, according to the following information:

Two semesters
Two four-month periods
Three quarters
Four bimesters

Equivalent to one year

For instance, if the respondent states having completed three semesters of professional education, write down 1 in GRADE and 6 in LEVEL; if he/she made it through the fifth semester, write down 2 in GRADE and 6 in LEVEL.

Some careers take four years and a half; this is, nine semesters; if all the semesters were approved, register only 4 in GRADE.

For people who did two undergraduate programs, register only the one picked by the respondent, or the one that lasted longer.

In the cases of careers that last longer than 8 years (music in the Conservatory), register 8 in GRADE and 6 in LEVEL.

The social service required in some careers, and the practice year, in the case of medicine, are not considered as approved grades. For instance, if the respondent states that he/she studied medicine for 7 years, ask him/her if he/she is considering social service and the year of practice: if this is the case, register 5 in GRADE.
Graduate………………………………………………..41

This level comprises the studies at master and doctorate level. The first one is done after undergraduate school, and must have obtained the diploma: the doctorate, after having completed the masters and undergraduate diploma.

For those who have approved any year of doctorate studies, add it to the approved years of masters studies, and register them in the corresponding columns.

It is worth mentioning that medical specializations, which last for two years, may be equivalent to masters. Moreover, subspecialties correspond to the doctorate level, and these studies last between one and three years. When they mention this type of studies, register them in this option.

On the other hand, certificate programs and specializations (usually one year graduate programs) are excluded from this type of studies since they don’t grant any grade or degree and their academic background and their duration vary. When they mention this type of studies, ask for the last approved grade in high school or college.

If the person doesn’t know how many year he/she has studied, since he/she studies in an open system of learning by parts (elementary and secondary) or subjects (high school), make the conversion to calendar years, following this scheme:

<table>
<thead>
<tr>
<th>Level</th>
<th>Grade</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Elementary</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Finished the first part</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Finished the second part</td>
<td>6</td>
<td>1</td>
</tr>
<tr>
<td><strong>Secondary</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Finished the first part</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Finished the second part</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Finished the third part</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>High School</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Between 12 and 23 approved subjects (one year finished)</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Between 24 and 35 approved subjects (two years finished)</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>36 or more subjects (three years finished)</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
When the individual states having attended the first grade of any level, register the approved grades in the level before.

For example if he/she is attending the first year of secondary, write 6 in GRADE and 1 in LEVEL, this indicates that he/she finished elementary: if he/she is attending the first year of high school, write 3 in GRADE and 2 in LEVEL, which corresponds to having finished elementary.

If the person is in the United States, given the proximity with Mexico, make the following equivalence:

- Elementary School - Elementary
- Junior High - Secondary
- High School - High School
- College or University - Professional
- Masters or Doctor - Graduate

When the person studied in another country, ask him/her to which educational level his/her studies corresponds, according to the levels included in the question. Also, inquire about the amount of years approved.

**DON’T KNOW.........................................................99**

Finally, if the respondent don’t know the information of any of the persons on the list, register 9 for grade and 9 for level (DON’T KNOW).

**Question 10. MARITAL STATUS**

The marital status of people who share the household with the respondent help determine the possible family responsibilities of each person, and therefore modify the possible support and responsibilities network of the respondent.

The marital status refers to the status someone (12 or older) holds in relation to laws and marriage and union customs of the country.

SINGLE is defined as someone who HAS NEVER BEEN MARRIED OR UNITED.

**Question 11. ECONOMIC SITUATION**

This question explores, according to the selected person’s option, the economic situation of each of the residents of the household, who are 12 or older. The respondent has five options to answer: Excellent, Very Good, Good, Fair, and Bad.

The answer is the personal opinion of the informant.
Ask the question verbatim, and read the five options to the respondent, in order to avoid creating a trend with the same answer.

**Question 12. ACTIVITY**

With this question we identify people, 12 or older, who have performed any economic activity during the week prior to the interview, differentiating them from those who didn’t perform any because they were doing non-economic activities.

Economic activity is understood as any action directed towards producing some good (grow corn, raise animals, plant trees, extract minerals, produce furniture, clothing, machinery, etc.), or rendering a service for the market (repair vehicles, teach classes, sell or retail different products, prepare and serve food, transport people or things, generate and distribute electricity and water, offer medical services, etc.). Also, agricultural production and raising animals for the household members consumption is included. It is worth mentioning that for this question we consider the person having worked, although he/she did not receive any retribution for the work, for instance, helping with a family business, with a home business, etc.

Non-economic activity refers to satisfying personal or family needs or activities, like studying, house chores, etc. Activities of personal interest are also included (volunteering, etc.), as well as doing nothing for whatever reason.

When the respondent informs that the person did economic activities, register the information about such economic activity. For instance, if a housewife, besides doing her house chores, works part time, consider this as work, and write code 1. If it is the case of a student, who the week prior to the interview worked part time, write code 1.

Here is the description of the answer choices for this question.

**Worked**.........................................................................................1

In this section we classify people who worked or helped to work, at least one hour a week, in an institution, company, business or family premises, on the street, among other places; regardless if they were paid, remunerated or made a profit.

Also, it includes people who helped in agrarian activities, or raising animals, for sale, for farm work, or for the consumption of household members.

We also classify under this category, people that during the week of reference attended their business, even if their products or services were not bought by anyone.
Had work but didn’t work..........................2

It includes people who are employed, but didn’t work last week temporarily, for any of the following reasons:

- Sickness or accident (temporal incapacity)
- Permit, leave of absence, or vacations for a certain time (for instance, someone with maternity leave)
- Strike in the workplace
- Malfunctioning of machinery, instrumental equipment or work vehicle
- Lack of raw material to do the job
- Work interruption due to weather, lack of rain, etc.
- Waiting for the start or already finished of harvest or other agricultural task.

The leading characteristic of people classified here is that they don’t lose their jobs because of their absence (this is, they are not unemployed), and for this reason, they are sure they will go back to their jobs as soon as their days of permit, leave, vacations, incapacity, etc. are over.

In this option we also include all those who in the week prior to the interview volunteer for community or social work, but they have a job. For example: peasants assigned to be part of some commission in a community or ejido.

Looked for a job...........................................3

This option helps define the economically active population of the sample. All the people who work or are looking for a job during the week prior to the interview define this population segment. All those disabled to work, or who don’t want to work are not included in this group of people.

Student.........................................................4

This option captures the people who are registered or attend an educational institution in order to learn, whether it be in the basic (elementary or secondary), medium (high school), or higher (professional) education systems, or in any of the technical or commercial education levels.

Devoted to house chores.........................5

In includes people devoted to the care or their homes. It also includes relatives who help with the house chores.

Didn’t work.....................................................6
These are the people who don’t have a job, and didn’t look for one during the last week. It also includes:

- People of old age who are permanently retired, pensioned, or disabled for several reasons.
- People who live from rent or investments. If they informed you that the person lives from the rent of a house, building, etc.; but also manages his assets or his business’s assets (charge rent, make receipts, ask for permits, etc.); classify him/her as option 1 (worked).
- Beggars, bums, people who don’t look for a job, as well as those who have never worked.
- People who support charitable activities as volunteers (national volunteers), or are affiliated to a political, religious, or civic organization. If this activity is paid, classify it in option 1 (worked).

Classify in option 1 people who answer to one of the following situations: did house chores but also sold fruit; study in the morning, but helps a carpenter in the afternoon; is retired but sell cosmetics. Give preference to the economic activity condition, even if the person devotes only few hours or doesn’t receive payment for the work done.

If after reading all the options the person still doesn’t know, write 9 DON’T KNOW. Be persistent and try to get an answer.

Starting with question 13, questions are asked only to respondent’s or spouse’s children 12 or older, that live in the household. Remember that we deal with biological children, as well as adopted, picked up, and stepchildren from both spouses.

**Question 13. INFANT HEALTH**

The question refers to the health of each child during his/her infant years. The answer helps establish if due to health problems, each respondent’s child received different help through the years from his/her parents.

The question is made for every child, if before turning approximately 10 he/she had to quit doing his/her normal activities (play, go to school, help at home) due to health problems. Here we do not include short periods of sickness, typical of the age, or staying in bed for a reasonable period of time, recovering from surgery.

**Question 14. CURRENT HEALTH**

The question refers to the current state of health of each child of the respondent. The answer helps establish the ability of each child to help with the care of their parents.
The answer is an opinion of the respondent. Serious problem or limitation refers to one that impedes him/her to do normal activities of the age, like studying, playing, working, or practicing sports.

**Question 15. NUMBER OF CHILDREN**

This question seeks to capture the number of children of each respondent’s child (or his/her spouse) that live in the same household.

Make it clear to them that we are interested in the number of children who were born alive and who still are, regardless of where or with whom they live.

**Question 16. CHILDREN LESS THAN 18**

This question captures each respondent’s child that lives in the household, if he/she has at least one child, who is 18 years old. Knowing this provides an idea of the responsibilities that each child may have, this gives an idea of the possibilities that each child has in a particular moment to support the respondent’s needs.

Make it clear that we are interested if he/she has children younger than 18 alive, regardless of where or with whom they live.

**Question 17. ALWAYS SHARING THE HOUSEHOLD**

This question captures whether each child has lived all his life with the respondent or not. It works as a filter for later questions.

Vacation trips, work commissions, visits to relatives, or other cause of similar nature, are not considered as dropping off the household, because in these movements, there is not an implicit change of residence.

**Question 18. MOVING IN ORDER TO LIVE TOGETHER**

This question inquires for each child who shares the house with the respondent, whether the child came to the house where the respondent already lived, or if the respondent moved to the house where the child already lived.

This question, in combination with the following, helps establish the direction in which the family supports are given.

**Question 19. HELP FROM THE RESPONDENT FOR MIGRATION**
This question attempts establishing if the respondent and his/her children have helped themselves mutually in the past, which can partially explain the observed assistance pattern in the present, or that can be expected in the future.

This question inquires for each child listed, if the respondent helped pay the moving costs and other migration expenses when each child migrated for the first time out of his/her parents home. It refers to the first move that each child did out of his/her parents’ home, without the parents. By parents’ home we understand the home where the person grew up; this means that it could be the home of only one of the parents, or tutor if the child was picked up by the respondent (or his/her spouse). This is the home where the person had his parents or tutor.

**Question 20. MOVING DESTINATION**

The goal of this question is to know if the first move out of the parental home of each respondent’s child was to another urban or rural area of the Mexican Republic, or if the move was to the United States or another country. This question will work as a filter for the following questions.

**Question 21. HAVE THEY EVER LIVED IN THE U.S.**

With this question we want to know if each child ever lived in or traveled to the United States (including Alaska and Hawaii), whether for working, studying, or living with someone else who was working. If the answer is that the person has only traveled to the United States for short visits for business purposes, has been sent from his/her work in Mexico, for health reasons, or for vacation, among others; consider that the person has NOT lived in the United States.

If during these questions you perceive that the respondent and/or his/her spouse get nervous or uncomfortable because of the content of the questions, assure them that the answers or any other information provided by them wont have any repercussion on the immigration status or any other issue concerning the children who live in the United States. This information is confidential. Make it clear to them that these questions are asked because they are related to the way in which families support themselves, and that this can affect the health of individuals of middle and old age.

**Question 22. HELP FROM THE RESPONDENT FOR MIGRATION TO THE U.S.**

This question attempts establish whether the respondent and his/her children have helped each other in the past; this can help establish the help patterns observed in the present and expected in the future.

This question asks about each child, if the respondent helped pay the moving and other migration expenses, when each child migrated to the United States for
the first time. If there was only one migration, this question refers to that single time.

If there is a case where the respondent didn’t help his/her children economically to migrate, but the respondent’s spouse did, you must register option 3 (only you or spouse).

**Question 23. TOTAL YEARS IN THE U.S.**

With this question we want to know approximately how many years has each child lived in the United States. If the child lived in the U.S. a certain amount of time during some part of his/her life, went back to Mexico, and later went back again to the United States, you must figure out the total amount of years and/or months the child has lived in that country. It is common that some people go during some months of the year. In these cases, you must add up the total amount of months that he/she has remained in the U.S. For instance, if in general the person spends 6 months of each year working in the United States, comes back to Mexico the 6 remaining months, and has done this during the last 20 years, we could estimate that the person has lived in the U.S. approximately 10 years.
5.3 SECTION A. DEMOGRAPHIC DATA

GENERAL INFORMATION

The goal of this section is to know the most important demographic information about the respondent. The questions in this section allow us to know the respondent’s life context, taking into account aspects from his/her birth, childhood, marriage, fertility, education, family, residences and migrations to the United States.

Question A1. DATE OF BIRTH

The exact date of birth of the respondent is key in an aging study, for this reason it is very important to get an answer as accurate as possible about the date of birth.

Read the whole question. If the respondent claims he/she doesn’t know, help him/her to give an approximate answer; remember that there is has to be an answer. If the respondent knows only part of the information, for instance the year, take that information, and write down DON’T KNOW 99 in the box that corresponds to month and day.

If the person doesn’t remember his/her date of birth, use some event of his/her life as a way to help them remember (marriage, a child’s birth date, year they started going to school, and his/her age when the event occurred, etc.) or ask him/her to show you an official document with the date of birth.

If they show you their voter’s credential (Mexican official I.D.) identify the year, month and day of birth in the voter’s code which are the first six numbers after the letters. From left to right, the first two number are the year, the following two, the month; and the last two, the day.

In case the respondent doesn’t remember the date of birth, and doesn’t have any documents to help us, figure out the year of birth in the following way: subtract the age reported on MHAS’s sample sheet, confirmed by the respondent), from the year of collection.

For example:
The year of collection is 2001 and the age reported by the respondent is 77 years, therefore the estimated year of birth is 1924 (2001-77=1924).

If you find inconsistencies between the age reported in the sample sheet and the one given to you by the respondent, give preference to the latter, and write the comment on the observations sheet. Also, do not forget to write in this same sheet that the date of birth is estimated.
Remember that the question must ALWAYS have information.

**Question A2. PLACE OF BIRTH**

This question refers to the place of birth of the respondent, whether this is in any state of Mexico or a country name in case of a foreign country. Write the name of the state where the person was borne; if the respondent only answers the country, ask additional questions to know in which state he/she was borne in.

**Question A.3 EDUCATION**

Look at question 9 on Registration Sheet for Habitual Residents of this manual.

**Question A.4 LITERACY**

The question tries to determine if there is a basic level of familiarity with letters and words, to be able to understand, for example, messages about health services or when to return to a doctor’s appointment. It refers to the respondent’s ability to read and write a message, regardless of his/her education.

If the respondent states that he/she only knows how to do one of the two, this is, he/she can read but not write, or vice versa, we consider he/she is not able to read and write a message; in this case you must circle the option NO.

**Question A.5 COUNTING**

This question captures whether the respondent is capable of counting from 1 to 10, or not, and tries to establish if the respondent understands numbers, regardless of his/her education.

**Question A.6 FAMILY CO-RESIDENCE DURING CHILDHOOD**

In the case where the respondent has lived during childhood (this is approximately before turning 10) close to his/her grandparents’ home longer than six months; mark 1 (YES). For this question it is not important that the child lived in a house different than his/her parents’ with or without his/her parents, or in his/her parental house with one of his/her grandparents. What is important to capture is the experience had by the respondent living with or close to a grandparent for a longer period of time during childhood.

**Question A.7 SANITARY INFRASTRUCTURE DURING CHILDHOOD**

The sanitary conditions that people are exposed to during childhood, approximately before they turn 10, are key for his/her health during childhood and older ages. This question refers to the sanitary conditions prevalent at the respondent’s childhood home. By toilet we refer to the existence and use of this
bathroom item that is located inside the house or land, regardless of being connected to the drainage and of exclusive family use.

It is important to point out that for this series of questions, the 10 years of age is an approximation. The respondent doesn't have to be sure that it was definitely before he/she was 10.

**Question A.8 SERIOUS HEALTH PROBLEM DURING CHILDHOOD**

This question refers to the respondent’s health during his/her childhood. It tries to capture whether the respondent suffered of any serious condition, illness or accident, which didn’t allow him/her to do his/her normal activities, or kept him/her in bed or convalescent for more than a month. As formal activities during childhood we’re referring going to school, playing, helping the parents, etc.

**Question A.9 ILLNESSES DURING CHILDHOOD**

This question has a table in which you will capture any of the diseases that the respondent could have suffered during his/her childhood, and could have effects on their health when they are old. These diseases are: tuberculosis, rheumatic fever, polio, and typhoid. The last line of the table refers to having received a serious injury on the head that provoked fainting or trauma. If the respondent thinks he/she suffered from the disease but is not positive, mark 9 (DON’T KNOW).

**MARITAL STATUS**

The series of questions about the history of partners of the respondent has the goal of identifying how long has him/her lived in matrimony or consensual union, and the total number of years under this union, regardless of the type. This information is important because life in union can affect the health status and well being of individuals of middle and old age.

**Question A.10 CURRENT MARITAL STATUS**

This question refers to the respondent’s marital status at the moment of the interview. It is very important that you get an answer from the respondent, since this will determine whether you continue with the rest of the questions in this section, or just go to the next one. The only case in which the respondent will be considered single is when he/she has never been married or united.

**Question A.11 and A.12 DURATION OF MATRIMONY OR UNION**

With the answers to these two questions we will be able to establish the length of the last union in two separate dates. If the respondent states that he/she is separated, divorced or widowed; you must ask for the year in which the last
union ended (A.11) and the year it started (A.12). If the respondent hesitates about the starting or ending years of the union, tell the respondent that he/she can give an approximate year, or how old he/she was at the time.

**Question A.13 and A.14 NUMBER OF MATRIMONIES AND UNIONS**

The questions refer to the history of free or marital union of the respondent. In A.13 we ask if he/she has had any other unions or marriages besides the current or more recent one. If the respondent gives an affirmative answer to this question you must ask question A.14. This later question captures the number of marriages and consensual unions that the respondent has had, excluding the current one. In the cases where the respondent has doubts because he/she was separated or divorced from someone, but went back together with that person, consider them as two unions. When the person hesitates to consider a relationship a union, ask that he/she be the one to decide.

**Question A.15 YEAR OF START OF THE FIRST UNION**

In case the respondent has stated that he/she has had more than one union through his/her life, we will ask more detailed questions about his/her first union only, since in most cases this is the most significant one.

This question combined with A.18 capture the number of years that the first union or marriage lasted.

When then respondent doesn’t remember the year of the first union, ask him/her to relate it with some other important event from which he/she does have memory, or ask: How old were you when you got married the first time? Afterwards, figure out the marriage year based on the date of birth of the respondent and his/her age at the time of the first marriage.

If the respondent has two dates, for instance, one for the civil matrimony and the other for the religious one; ask then when they started to live together and register the duration according to this information.

If the respondent states having been united with one person and married that person, consider the dates of the time when they started to live together.

**Question A.16 TYPE OF FIRST UNION IF MORE THAN ONE**

Make it clear here that this is the first time the respondent lived in union, regardless of what kind, either if it was consensual union or marriage. The question captures the type of union, this is, if the first one was a consensual union or a marriage.

**Question A.17 REASON FOR ENDING THE FIRST UNION**
This question captures the reason why the first union or marriage ended. The possible reasons are three: separation, divorce, and death. With this question we know if the first union or marriage ended because of divorce, death, or (in the case of consensual union) because the couple got married. Another option is that the union ended up in separation. Read the options following the established order until you get an affirmative answer.

**Question A.18 ENDING YEAR OF THE FIRST UNION**

This question refers to the year in which the first union or marriage ended. In the cases of consensual union use the year in which the couple separated. In the cases of marriage, and if the respondent indicates he/she has the date of separation of divorce, you must take the year of separation as ending year of the first union. This is, you capture the year in which they ceased living together.

In the case where the respondent doesn’t remember the year in which his/her first union ended, ask him/her to relate it to another important event from which he/she does have memory, or ask: How old were you when you got divorced or separated for the first time? Afterwards, figure out the year of separation based on the year of birth and the age at which the respondent married for the first time.

**Questions A.19 and A.20 NUMBER OF BIOLOGICAL CHILDREN**

This question captures the number of biological children, born alive, that the respondent has had. This question is asked to both men and women. Do not include children born dead, abortions, adopted, or steph-children ones. Count the biological children, even if they are not alive. We consider CHILDREN BORN ALIVE the people who at the time of birth presented vital signs like: breathing, crying, or movement; even if they died immediately after presenting such signs. Question A.20 considers the respondent’s children mortality, if he/she had any. The question refers to the number of alive children among the total reported in A.19.

**MIGRATION HISTORY**

Questions A.21 to A.36 refers to the migration history of the respondent. They try to establish if the respondent migration was part of a family tradition of migration for economic or working reasons. Also, the questions inquire if the respondent and his/her family networks supported each other in the past to afford the migration movements.

**Question A.21 LENGTH OF STAY IN CURRENT LOCATION**

The goal of this question is to find out how long the person has lived in the community that he/she is at the time of the interview. We refer to the approximate
time that he/she has been living in such place (city, town, ranch). If the answer is “since the last time I arrived,” this indicates that the respondent has lived there several times. Verify if this is the case, and ask him/her to report only the time since the last arrival.

If they give you answers like: “I arrived in 1986,” figure out the time as follows:

From the year in which the interview is made (2001) subtract the year in which the person arrived to the place where you are registering him/her (1986), (2001 - 1986 =15), to determine that he/she has been living 15 years in the place of the interview.

When the answer is “don’t know,” you may use memorable events as dates. You can try asking his/her age when he/she arrived, to help him/her remember. If you don’t get an answer with this, write 99.

**Question A.22 DESTINATION OF FIRST MIGRATION OUTSIDE PARENTAL HOME**

This question complements question A.23, which deals with the support received by children from their parents when they leave their parental home for the first time. The destination of the migration of the children helps explain the differences in the financial aid received by the children. For instance, when two children of the same gender migrate at the same age, and for the same reason, it is expected that they receive the same help; however, one of them could’ve migrated to another country while the other to a nearby city, this relative difference in the need of the aid would be captured in this question.

It is worth remembering that in the case of moving without the parents because they died, this is NOT considered as migration. Hence, the destination that will be considered will be the one from the first migration AFTER the parents’ death (if the respondent migrated afterwards).

It is worth mentioning that by parents’ home we mean the home that the respondent considers his/her “parental home”, or where he/she was raised, which can be, for instance, the home with only one of the parents, an aunt who raised him/her, a foster home. This is the place where he/she had a mother/father or tutor.

**Question A.23 HELP RECEIVED FOR FIRST MIGRATION**

This question inquires if for the first time that the respondent moved without his/her parents, he/she received financial help from his/her parents, siblings, friends or spouse. As financial help we consider loans or presents received by the respondent, or any other kind of support related with tickets for transportation fares, and other moving or settling expenses.
If the respondent received help from several people, ask for the help he/she considers more important or main help.

**Question A.24 KNOWN PEOPLE IN THE FIRST MIGRATION DESTINATION**

This question refers to the existence of migratory networks of support. The question not only refers to known people in the place of destination, but also known people who could help him/her get settled. These are those people who offered him/her orientation, and even a place to stay. It is not necessary that the person who offered him/her help, actually helped him/her, what is important is that the respondent had the expectation of having help in the place of destination when he/she migrated.

**Question A.25 RESIDENCE IN THE UNITED STATES**

With this question we want to know if the respondent has ever lived in the United States, whether it was for working, or just to live there to accompany someone else who was studying or working. If the answer is that he/she has only traveled in short visits for business reasons, has been sent in work commission (being employed in Mexico), for health reasons, or for vacations, among other reasons, consider that the person has NOT lived in the United States.

In the case of messengers who cross the border often to carry merchandise and/or money, this is not considered as living in the United States.

The people who live in Mexico but work in the United States, particularly in the border zone, ARE considered as being resident, since they are people who have worked in the United States.

**Question A.26 YEARS IN THE UNITED STATES**

With this question we want to get information about the approximate amount of years the respondent has lived in the United States. If he/she lived in the U.S. a certain amount of years during one period of his/her life, came back to Mexico, and afterwards returned to the United States, you must figure out the total sum of years that the respondent lived in that country. It is common that some of the respondents go several months of the year to work on seasonal jobs. In these cases, you must add up the total amount of months that he/she remained in the United States. For instance, if the respondent spends six months of every year working in the United States and goes back to Mexico the remaining six months, and has done this during the last 20 years, the respondent has lived approximately 10 years in the United States.

**Question A.27 to A.30 YEAR OF MIGRATION (RETURN) TO (FROM) THE UNITED STATES FOR THE FIRST TIME**
These questions, besides capturing the length of the first stay in the United States, if migrated more than once, provide the age in which the respondent went to live in the United States and the age or year in which he/she came back to Mexico in that particular occasion.

**Question A.27 LONGER STAY**

In case the respondent doesn’t remember the exact age or year, ask him/her to remember an approximate one. When the respondent has difficulties answering, you may ask how long did the first stay last, and with this figure out the age or year he/she came back. The option HAVE NEVER LIVED IN THE U.S. is applicable when the person has not lived in the U.S., he/she worked or works only going and coming every day; this is, he/she crossed the border daily, which is very in common in the north of the country.

**Question A.28 KNOWN PEOPLE IN THE FIRST STAY IN THE UNITED STATES**

This question refers to the existence of migratory networks between the places of origin in Mexico and the place of destination in the United States. The question not only refers to known people in the destination, but known people who could help him/her settle down. This means, people who offered to provide him/her orientation or a place to stay. It is not necessary that the person offered the help actually did so, what is important is that the respondent could expect to receive help in the place of destination when he/she migrated.

**Question A.29 SUPPORT RECEIVED FOR THE FIRST MIGRATION TO THE UNITED STATES**

This question inquires if the respondent received any financial help from his parents, siblings, friends, his/her spouse, or simply nobody, to cover the travel and moving expenses for the first migration to the United States. By financial help we refer to the support, whether as loan or present; for travel, transportation, papers, or settling down.

**Question A.31 TYPE OF MOST FREQUENT AREA OF RESIDENCE**

This question tries to capture the type of environment in which the respondent lived most of the time when he lived in the United States. This question considers the whole time that the respondent was in the United States. The categories are mainly urban, mainly rural, or the same time in both. We refer as mainly urban to state capitals, important cities, or cities with 100,000 inhabitants or more.

**Question A.32 IN WHAT YEAR OR AT WHAT AGE DID YOU GO BACK TO THE UNITED STATES THE LAST TIME**
This question attempts to know at what age the respondent came back from the United States in his/her most recent trip; this is, the last time he/she was there.

**Question A.33  PERMANENT RESIDENCE OR CITIZENSHIP IN THE UNITED STATES**

This question aims at knowing whether the person currently has a residence and work permit in the United States or is citizen of that country, or neither. People holding a “green card” are allowed to reside and work in the country, but are not citizens.

**Question A.34 RESIDENCE OF FORMER SPOUSE IN THE UNITED STATES**

This question applies only to people who currently don’t have a spouse; this is, widowed, separated, or divorced person. The question inquires if the former spouse or partner of the respondent ever lived in the United States, regardless of having done so during the marriage, before, or after it. Again, short trips for vacations, work commissions, or health reasons are not considered as residence in the United States. If the respondent states having had more than one spouse, ask about the last one.

**Question A.35 and A.36 RAISING THE CHILDREN ALONE**

These questions apply only to women; its goal is to measure possible consequences of the migration of men on the quality of life of women.

It inquires if the respondent ever had to raise her children without a spouse. This could have happened while he was in another city, for instance, working, or because the woman didn’t have a spouse or partner. The answer options include a YES, NO or the respondent did it voluntarily (VOL), but others, like the family members, were with her. Question A.36 finds out the approximate number of years during which this happened. If it happened several times, add up the total time, considering all the times that this occurred.

**Question A.37 DO YOU SPEAK ENGLISH?**

This question’s goal is to know whether the respondent speaks English or not. Speaking English may be a prominent factor not only in the migration decision taken by the respondent, but also to know how easy it was for him/her to integrate into society when he was in the neighboring country. The answer options include YES, NO, “YES, some.” In order to consider the answer as a YES, the respondent must sufficiently know how to speak so to conduct a conversation, and not only knowing some words in English.

**Question A.38 INDIGENOUS LANGUAGE**
This question refers to whether the person speaks any indigenous language or not. The degree of understanding is not important. If the respondent can have a conversation with someone in that language, then we consider he/she speaks the indigenous language.

**Question A.39 IMPORTANCE OF RELIGION IN HIS/HER LIFE**

This question inquires if the religion is, in general, important for that person. Read the question and mark the corresponding answer. If the person has doubts about the question, clarify by saying that we are interested in knowing, for instance, if the important decisions in life he/she takes, takes them considering the mandates of his/her religious preference.

**Question A.40 VOLUNTEERING IN THE LAST TWO YEARS**

This question captures whether the respondent has volunteered or not. It means having helped without being paid, in any moment during the last two years, regardless of how long; in an organization of any kind, like the church, schools, the community, the Red Cross, etc.

**Questions A.41 and A.42 HOURS DEVOTED TO VOLUNTEERING**

These questions try to get an approximate total number of the hours, during the last two years, devoted to volunteer. Question A.41 asks for the number of hours during the two-year period, regarding some periodicity. For instance, if the person indicates that he/she volunteers two hours a week, mark 2 in hours and 2 (week) in PERIOD.

If the respondent doesn’t provide an answer in A.41, then ask the rescue question A.42. In this question ask if they were less than 2 hours per week, approximately 2 to 4, or more than 4 hours per week. If the person indicates that the amount of times “varies,” ask him/her to give you an average, which occurs frequently.

**Question A.43 EVALUATION OF THE RESPONDENT**

This question is never asked, it must be answered by the interviewer according to his/her own opinion. Write down if the respondent didn’t need help (NEVER), got little help (FEW TIMES), a lot of help (MOST OR, OR ALL THE TIME); to answer the questionnaire in this section.
5.4 SECTION B. NON-RESIDENT CHILDREN

This section’s goal is to measure the children’s characteristics as part of the family network that surrounds the respondent. The first part collects data about the children who don’t live with the respondent, and the second collects information on deceased children, if the respondent had any. We want to know the way in which the respondent could benefit from his relatives, according to the socioeconomic and family conditions of each child.

Consider as children the following types: biological, stepchildren, adopted, and foster children; from the selected person or his/her spouse. The children that are part of an additional household of the house of the respondent must be captured in this section.

When the interview is conducted with the selected person and the spouse, this section should be applied to the first one to be interviewed, since we are talking about the children of both. In other words, this section appears only in the first interview of the questionnaire. However, take into account that there may be information from this section that may be needed for completing the questionnaires of both members of the couple, specifically, the line number assigned to each child.

The NON-RESIDENT CHILDREN Roster is at the beginning of the section. The List that is on a sheet bigger than the rest of the questionnaire, will allow you to have the name of the person and the line number handy for the remainder of the interview.

As you can notice, all questions about non-resident children are consolidated in this section, hence, you must ask all the questions following the line order for each child. Once you have finished asking all the questions for that child, continue in the next line that corresponds to another child.

**Question B.1 RESPONDENT’S CODE**

Write down if the person providing the information is the selected person (key 1) or the selected person’s spouse (key 2).

**Question B.2 NON-RESIDENT CHILDREN**

This question provides a filter to determine whether you should ask the following series of questions or not. We establish if the interviewee (or his/her spouse) has a child alive that doesn’t live in the household where the interview is taking place. Since we are dealing with children from the two members of the couple, these can be biological, step-children, adopted, or foster children that the respondent or the spouse may have, and are alive. Write down YES or NO.
The children, who are part of an additional household, different than the one of the MHAS selected person’s, must be included in the list of non-resident children: but not the other members of those additional households.

**Question B.3 REGISTRATION NUMBER**

This question helps identify each non-resident child using a code.

**Question B.4 NON-RESIDENT CHILDREN ROSTER**

Write the first name on the first line and don’t leave blank spaces between names.

When writing the names, it is recommended that the declaration of people’s names will be in descending order, according to age. Ask the respondent to list the children from oldest to youngest, beginning with the single ones and continuing with the married ones. This may facilitate the respondent to remember all the children, and allows better control of the interview. Remember to ask if he/she has considered the spouse’s children as well.

When writing names, avoid last names, except when names are repeated. In this case write down the last names, in order to differentiate them when asking for the individual information.

If you make a mistake writing a name, remember to cancel it with two horizontal lines and write the correct information on the same line number. Take into account that we are only interested in the children who don’t live in the household and the ones that ARE NOT members of the household, so if when writing a name the respondent mentions that this person lives there, you must NOT register them in this list and verify that they are included in the TR - household residents list.

If by mistake you include somebody twice, cancel one of the lines from beginning to end of the section. Also, mark with an asterisk and explain the situation in the OBSERVATIONS sheet.

After making sure that you have written down all the non-resident children of the respondent or his/her spouse, ask the remaining questions of this section.

**Question B.5 SEX**

By sex we are referring to the biological condition that distinguishes men from women.

Write the code according to the sex of the person you are asking about.
When asking the question for each person, do it an affirmative tone if the name brings you no doubts. If it is a name that can be used for man or woman, for instance: Guadalupe, Rosario, Ines, Asuncion, Refugio, Concepcion, Nazareth, Abigail, Jesus, Soledad, Cristian, among others, make the question verbatim.

Apply the same procedure in the case of uncommon names (Areli, Erandi, Andarani, Nitx, etc.), since they can correspond either to a male or a female.

**Question B.6 KINSHIP WITH THE SELECTED PERSON**

The goal of this question is to identify the relationships between the non-resident children and the selected person.

In this case the relationship of the children is clear. However, there could be several cases like the biological child, stepchild, adopted child, foster child, and others. This typology is important because it determines, to some extent, the help that receive and give individuals of middle and old age.

By foster child we understand someone raised by the selected person but who doesn’t have any legal binding with him/her. However, we may be facing the case of a nephew, fostered and raised by the selected person, and hence they have a blood relationship. In this case, allow the respondent to decide whether they have an uncle-nephew relationship or a parent-child one.

**Question B.7 KINSHIP WITH THE SELECTED PERSON’S SPOUSE**

The goal of this question is to identify the relationship between the non-resident children and the SELECTED PERSON’S SPOUSE.

The guidelines for conducting this question are similar to those in the previous one, KINSHIP WITH THE SELECTED PERSON, but this one refers to the relationship with the spouse.

If the respondent doesn’t have spouse, write code 6.

**Question B.8 AGE**

The age of the non-resident children may determine the actual or potential attentions that the respondent may get. It is important to have this information.

Age is defined as the number of years lived by the person since the date of birth until the moment of the interview.

Read the whole question, mentioning the person’s name.
If he/she answers that he/she doesn’t know, help the person give an approximate answer. Remember that there must be an answer.

In the case of non-resident children younger than age one year, write down zero on the spaces provided for age.

Bear in mind that sometimes the answer may correspond to the age that the person will soon have and not the actual one. When they answer “around 38,” inquire whether it is 37 or 38.

If the person doesn’t remember his/her children’s age, help him/her with some event of his/her life (child’s marriage, a grandson’s birthday, school year the child is in, etc.). In case the respondent has access to birth certificates or school diplomas from his/her children, these could be useful to determine the age.

Questions B.9 to B.23 are applicable to non-resident children 12 or older.

**Question B.9 SCHOOL ATTENDANCE**

Refer to question 9 of the Household Roster for Household Residents in this manual for details about this question.

**Question B.10 CONTACT WITH THE RESPONDENT**

This question’s goal is to know if the respondent (or the spouse) has had contact, during the last two years, with the children of the list. By contact we mean any exchange of information personally, through mail, telephone, or some other mean. If they have lost all contact, indicate NEVER (0/0). If there has been any, indicate the average number of times per PERIOD.

**Question B.11 MARITAL STATUS**

The marital status of the non-resident children of the household, help determine the possible family responsibilities of each person and hence, it can modify the support and responsibility networks of the respondent (or his/her spouse).

Marital status refers to the situation that somebody (12 or older) has in relation to the law and customs of the country regarding union and matrimony.

**Question B.12 INFANT HEALTH**

The question refers to the health conditions of each listed child during his/her infant years. The question helps to establish if due to health problems, each child got different help from their parents through the years.
The question inquires for each child, if before turning 10; he/she ever had to quit his/her normal activities (playing, going to school, helping at home) because of health problems. Short period diseases, typical of certain ages, or staying home to recover from a surgery during a reasonable period of time are excluded.

**Question B.13 CURRENT HEALTH CONDITIONS**

The question refers to the current health condition of each listed child. The answer helps establish the ability of each child to help with his/her parents’ care.

The answer is the respondent’s opinion. Serious problem or limitation refers to conditions that currently impede him/her do the normal activities related to his/her age, like studying, working, or practicing sports.

**Question B.14 ECONOMIC SITUATION**

This question seeks to inquire about the economic situation of each of the non-resident children of the household, according to the respondent’s opinion. The respondent has five options to choose from: Excellent, Very Good, Good, Fair, and Bad.

**Question B.15 CURRENT ACTIVITY**

With this question, we identify the children age 12 or older who are doing any economic activity, differentiating from those who didn’t do it because they did non-economic activities. The idea is to get information about what every child does normally or generally, at the moment. Notice that in this case we only give four options, which differs from the options given in the Household Roster.

We understand by economic activities, every action aiming at producing any good (grow corn, raise animals, plant trees, extract minerals; make furniture, clothes, machinery, etc) or providing any service (repairing vehicles, teaching, selling, cooking and serving food, transportation, etc.). We also include agricultural production and raising of animals for consumption of the household members.

We understand by non-economic activities those performed to satisfy personal or family needs or activities; like studying, house chores, etc. We also include activities of personal interest (volunteer, participation in clubs, etc.) as well as doing nothing for whatever reason.

When the respondent states that the person performed economic activities part time, register the information concerning the economic activity performed. For instance, if it is the case of a wife who, besides the house chores, works part time, consider that the person worked, writing code 1.
The options for this answer are described as following:

**Work**.................................................................1

In this option we classify the people who work or help to work at least one hour a week, in an institution, company, family business or premises, on the street, among others, regardless of them getting paid or receiving remuneration.

It also includes people who help in agricultural activities or raising animals for sale or for consumption of the household members.

We also classify under this category people who take care of their businesses.

For this question, the category “work” includes people who have a job but are temporarily not working, for any of the following reasons:

- Illness or accident (temporal disability)
- Leave of absence, or vacations for a certain period of time (for example maternity leave)
- Strike on the workplace
- Malfunctioning of machinery, equipment or vehicle
- Lack of raw material to do the job
- Job interruption due to the weather
- Waiting for, or already finished, the time of harvest

The characteristic of the people classified here is that they don’t lose their job because of their absence (this is, they are not unemployed), and for this reason, they are sure to be able to resume their jobs when the leave of absence, vacations, disability, etc. finishes.

We also include in this option those who have a job and are temporarily not working because they are doing community or social work. For example: peasants assigned to be part of a commission or community group (*ejido*).

We also include in “work” those who are currently looking for a job. Those unable or unwilling to work are not included among this group of people.

**Student**.................................................................2

It captures the people who are enrolled or attending an educational institution in order to learn. Whether this be the basic (elementary and secondary), middle (high school) or higher (professional) education system; or any of the levels of technical and commercial education.

**House chores**.......................................................3
It includes people devoted only to house chores. Relatives who help with the house chores are also included in this option.

**Doesn’t work**..........................4

These are people who don’t have a job, and are not looking for one. It also includes:

- Retired people
- Older people who don’t perform economic activities, although they are not retired.
- People permanently disable to work.
- People who live from rent or bank investments. If they state that the person lives from the rent of housing, but also administers his/her businesses (collects the rent, makes receipts, etc.), classify them under option 1, work.
- Beggars, bums, or people who never looked for a job, or have never worked.
- People who volunteer (on permanent basis). If they get paid, you must classify them under option 1, work.

Classify under option 1, people who answer something similar to the following: did house chores, but also sold fruits; study in the morning, and help the carpenter in the afternoon; is retired, but sells make up. Give preference to the economic activity, even if the person devotes few hours to it, or doesn't receive payment for the job done.

If after reading all the options the person ignores the information, write code 9 DOESN’T ANSWER. Be persistent, and try to get an answer.

**Question B.16 NUMBER OF CHILDREN**

This question captures the number of children of each non-resident child that was listed. These are the grandchildren of the selected person and/or the spouse. Make it clear that we are interested in the number of children alive, regardless of where they live, or with whom.

**Question B.17 IF THEY HAVE CHILDREN YOUNGER THAN AGE 18**

This question captures for each listed child, whether he/she has a child under age 18 or not. Knowing this provides an idea of the responsibilities that each listed child may have, which in turn gives an idea of the ability that each listed child has for helping the respondent or other individuals of middle and old age.

Make it clear that we are interested in the number of children alive, regardless of where they live, or with whom.

**Question B.18 PLACE OF RESIDENCE**
This question captures the place of residence of each non-resident child listed.

In option 1 “Same house or building”, we classify the children of the selected person and/or his/her spouse that live in the same house, but are part of a different household (additional household).

**Question B.19 HELP RECEIVED WHEN LEAVING THE PARENTAL HOME**

This question aims at establishing whether the respondent and his/her children have helped each other in the past or not, which can explain the help patterns observed in the present or expected for the future.

This question inquires about each listed child, if the respondent helped to pay the moving and other migration expenses when the child left the parental home for the first time. We are referring to the first time the child left without the parents. By parental home we understand the home were the person grew up, so this could be the home of one of the parents only, or the tutor, if the child was fostered by the selected person (or the spouse). In other words, the place where the person had his/her parent(s) or tutor.

If a case comes up where the respondent didn’t help but the spouse did, you must register option 3 (you- or spouse- only).

**Question B.20 MOVING DESTINATION**

The goal of this question is to find out if the first time that each listed child left the parental home was to move to a rural or urban area in Mexico or to the U.S., or to another country. This question will function as a filter for the following three questions.

**Question B.21 WORKING OR LIVING IN THE U.S.**

With this question we want to know if each listed child ever traveled to or lived in the U.S. (including Alaska and Hawaii); this could have been with the intention of working or just to live with someone who was working. If the answer is that he/she has only traveled to the U.S. for short visits to do business, job function (being employed in Mexico), for health reasons, or for vacations, among others, consider that the person has not lived in the U.S.

**Question B.22 HELPING THE SELECTED PERSON MIGRATE TO THE U.S.**

This question’s goal is to establish if the selected person and his/her children have helped each other in the past, which can help to explain the help patterns observed in the present or expected in the future.
This question asks, for each listed child, if the selected person or someone else helped pay the moving and other migration costs, when each child migrated for the first time to the United States. If there was only one stay, then it refers to that one time.

If during the course of these questions you notice that the selected person or his/her spouse feel uncomfortable or get nervous due to their content, assure them that the answers or any other information that they provide wont have any repercussion on the migration status, or any other aspect concerning the children who are in the U.S.

The information is confidential. Make it clear to them that these questions are made because they shed light on the way family members support each other, which can affect the health condition of individuals of middle and old age.

**Question B.23 TOTAL YEARS IN THE U.S.**

With this question we want to know approximately how long the selected person’s non-resident child lived in the U.S. If he/she lived in the U.S. for a certain amount of time during a particular period of his/her life, returned to Mexico, and afterward went back to the United States, you must figure out the total amount of years and/or months the child lived out of Mexico. It is common that some of the non-resident children of the respondent go certain amount of months during every year to perform seasonal jobs. In these cases, you must also add up the amount of months that the child stayed in the U.S. For example, if the non-resident child spends six months of each year working in the U.S., and comes back to Mexico, the remaining months, and he/she has done this the last 20 years, we can say that the non-resident child has lived 10 years in the U.S.

**Question B.24 DECEASED CHILDREN**

This question works as a filter for the coming questions. We ask if the selected person or his/her spouse had any child that was born alive, and has already died. Be cautious, since these are sensitive questions. Remember that since they are children of the selected person, as well as the spouse, they can be biological, step, adopted, or foster children, or any of the two.

**Question B.25 REGISTRATION NUMBER**

It identifies every deceased child with a code.

**Question B.26 NAME**

Write the first name of the deceased child on the first record, and don’t leave blank lines between names.
When writing the names, it is recommended to do it in descending order according to date of birth. This can prevent the respondent from missing one of his/her children, and allows for better control of the interview.

When writing the names, do not write down the last names, except when two names are repeated. In these cases, write the last names of each person to distinguish them when asking about their individual information.

If you make a mistake when writing the names, remember to cancel it with two horizontal lines, and write the correct information on the same line.

If by mistake you write down a person’s name twice, cancel one of the two from the beginning until the end of the section. Also, mark an asterisk and explain the situation on the Observations Sheet.

After making sure that you have all the respondent’s deceased children, ask the remaining questions in that box.

**Question B.27**

We understand by sex the biological condition that distinguishes men from women. Mark the code, according to the gender of the deceased person you are asking about. When asking the question, use affirmative tone if the name doesn’t leave room for doubt.

**Question B.28 and B.29 KINSHIP**

This question’s goal is to identify the relationship between the deceased children and the selected person. B.29 identifies the relation between the deceased and the spouse.

the parenthood relation is clear in this case. However, we can have several cases like the biological child, stepchild, adopted child, foster child, or other. This typology is important because it helps determine the assistance received and given by individuals of middle and old age.

By foster child we refer to someone raised by the selected person or his/her spouse, but that doesn’t have any legal binding as a child. However, we could have the case of a nephew raised by the selected person, with whom obvious blood ties exist. In this case let the respondent decide if their relationship is parent-child or uncle/aunt-nephew. In the latter case, you shouldn’t include it in this list.

**Question B.30 AGE WHEN DIED**
The age at which they died determines the possible attentions that the respondent could have received or given. It is important to have this information, and remember that we only expect an estimate.

The age of a person is the number of years that passed since the date of birth until his/her death.

Read the whole question, mentioning the person’s name. If the respondent answers that he/she doesn’t know, help him/her figure out an approximate age, remember that we must have an answer. In the case of children who died before they turned age one, write zero in the space provided.

If the respondent doesn’t remember the date of birth, help him/her by referring him/her to an event of his/her life (child’s wedding, grandchild’s birth, etc.). In case the respondent has death certificates at hand, they could be useful to figure out the age at the moment of the death.

**Question B.31 EDUCATION**

Question B.31 to B.35 are applicable only to those deceased children who reached age 15 or more before dying. Question B.31 has two parts, which capture the level and grade of education of each person.

Go to question 9 of the Household Roster for details on how to classify the answers for this question.

**Question B.32 HEALTH PROBLEMS BEFORE AGE 10**

This question refers to the health of each deceased child during childhood. The answers help establish if, due to health conditions, each child received different levels of help from their parents.

**Question B.33 HELP FROM SELECTED PERSON FOR MIGRATION**

This question’s goal is to determine if the selected person and his/her children have helped each other in the past, which can, in turn, help explain present help patterns, and those expected in the future.

This question inquires, for each deceased child, if they received help from the selected person or anyone else to pay moving and other migration expenses, when they moved out of the parental home for the first time. If there is any case in which the child never moved out of the parental home, write “never moved.” If a case comes up in which the respondent didn’t help the migrant children, but his/her spouse did, register YES.

**Question B.34 EVER LIVED OR WORKED IN THE U.S.**
With this question we want to know if any of the deceased children ever lived in the United States, either to work or study, or with the simple intention of accompanying somebody who was working. If the answer is that he/she only visited the U.S. for short periods for business, or in a work commission, but remaining employed back in Mexico, for vacations, or health reasons, consider that he/she never lived in the U.S.

**Question B.35 HELPED FROM SELECTED PERSON FOR MIGRATION TO U.S.**

This question’s goal is to determine if the selected person and his/her children have helped each other in the past, which can, in turn, help explain the present help patterns, and those expected in the future.

This question inquires, for each deceased child, if the respondent helped pay the moving or other migration costs, when the child first migrated to the United States. If the child only stayed once in the U.S., refer to that occasion.

**Question B.36 MULTIPLE-BIRTHS CHILDREN**

This question wants to establish if the respondent or his/her spouse ever had children who were born as twins or in multiple-births. The goal of the question is to capture if they received different treatment from their parents, although they children have the same age. Consider help given or received.

**Question B.37 IDENTIFICATION OF MULTIPLE-BIRTH CHILDREN**

This question captures the identification of each child from multiple births, through their line number in the Roster. Find their number either at the Household Roster if they live with the respondent, or at the Non-Resident Roster if they live somewhere else. It is possible that any or all of the children from multiple-births are deceased; in this case their registration number are on the same section B, questions B.25 and B.26.

Space is provided for up to two multiple-births of three children each. For instance, if the respondent states having first twins: Juan y Pedro, and then a multiple birth of three: Norma, Alma y Luis.

**Question B.38 RESPONDENT EVALUATION**

This question is never asked, it must be answered by the interviewer according to his/her own opinion. Write down if the respondent didn’t need help (NEVER), got few help (FEW TIMES), or a lot of help (MOST OR, OR ALL THE TIME); to answer the questionnaire in this section.
5.5 SECTION C. HEALTH

The goal of this section is to learn about some health characteristics of the respondent. With these questions we want to know the perception of the respondent on his/her own health, compare his/her current health with previous years, and find out if he/she is under medication or treatment. Other questions of the section deal with illness affecting or having affected the respondent, and with medical complications in the past. We ask detailed questions about the more frequent illnesses present in individuals of middle and old age. Besides, we ask questions about personal habits that may indicate expectations on the respondent’s future health.

FOR THE HEALTH QUESTIONS, REMEMBER THE FOLLOWING INSTRUCTIONS:

− When we ask if “a doctor or medical personnel…,” we refer to general physicians, and specialists like dermatologists, psychiatrists, etc. The criterion for defining medical personnel is someone who makes a health diagnosis based on lab analysis performed on the respondent.
− When we ask “has a doctor or medical personnel ever told you …,” we mean WE DON’T WANT AUTO-DIAGNOSIS, but only current or previous medical conditions of the respondent that a doctor or medical personnel has notify to him/her or his/her relatives.
− When we ask “has a doctor or medical personnel ever told you …,” we mean any time throughout the respondent’s life.
− If the respondent states that he/she was told having “symptoms of …,” or was “about to have …” (the mentioned condition), consider that he/she DID HAVE or HAS the condition.
− We ask about details of certain chronic illnesses, treatments, and personal habits. Make the questions verbatim, without forming an opinion.
− In several of the questions we refer to a period of time of “the last two years.” The purpose of using this period is to be able to compare with the second visit of this longitudinal or panel research, since we are planning to do the next round in approximately two years. In all the cases, the respondent doesn’t have too be accurate regarding time elapse; it can be approximately in the last two years.

Question C.1 RESPONDENT’S HEALTH CONDITION

It refers to the general current health condition, according to the respondent’s perception.

Question C.2 CURRENT HEALTH COMPARED WITH THE PAST
It refers to the general state of health now compared to how it was two years ago, in 1999, by the month of the interview. The exact month and condition are not important; we only expect a general opinion.

**Question C.3 CONTACT WITH PHYSICIAN**

The goal of this question is to know if the respondent has had contact with a doctor or medical personnel throughout his/her life. If the respondent states having visited a doctor or a clinic, even if it was long time ago, mark YES.

**Question C.4 HYPERTENSION OR HIGH BLOOD PRESSURE**

Hypertension refers to a persistent high blood pressure. The cause can be unknown, and it may be related to other primary illnesses. It may, or it may not be receiving adequate treatment.

**Question C.5 MEDICATION FOR HIGH BLOOD PRESSURE**

Be aware that home medicines should not be accounted as medication. Medical personnel or homeopath must have prescribed the medicine. If the respondent says he/she is taking a diuretic, this can be related to the blood pressure control of the respondent.

**Question C.6 DIABETES**

For many people, the expression “sugar” or “sugar in the blood” may be more common. If a physician ever told the respondent he/she had diabetes or sugar, write YES, even if it is already under control.

Diabetes (mellitus) is a metabolism disease, in which the level of sugar in the blood is high and oftentimes accompanied with sugar in the urine. The treatments include insulin shots (this is a hormone), pills, special diets, and loss of weight.

**Question C.7 and C.8 MEDICINE FOR DIABETES**

Question C.7 inquires if a physician or medical personnel ordered the respondent to take any medication. If the answer is affirmative, mark YES. If the respondent is taking natural self-medicated medicines, do not consider them. Question C.8 refers specifically to the use of insulin for diabetes.

**Question C.9 SPECIAL DIET FOR DIABETES**

Consider here that a special diet doesn’t have to result in loss of weight. The diets for diabetes are low in carbohydrates and without refined or simple sugar.
Question C.10 DIABETES UNDER CONTROL

“Under control” means that the level of blood sugar of the respondent is always within the normal range.

Question C.11 BLOOD SUGAR TEST

The question wants to know if the respondent has regular tests performed, in his/her own home or with a doctor or medical personnel, to measure the sugar levels in the blood or urine. Write down the number of times per period according to the options provided. For instance, if the respondent says once every two weeks, write 2 in times and 2 in period (month).

Question C.12 CANCER OF MALIGNANT TUMOR

Minor skin cancer IS NOT considered here as cancer, since they occur frequently and they are rarely lethal. Examples of these types of minor cancer are basal cells carcinoma, basal epithelial cells carcinoma, as well as the scams-cellular carcinoma.

A melanoma or a malignant melanoma are considered cancer, since they represent serious health problems.

Question C.13 NUMBER OF CANCERS

If the cancer has been detected twice or more in the same place, it should be considered as only one.

Question C.14 ORGAN WHERE THE CANCER WAS LOCATED

Indicate the list of organs with cancer in the order they appeared.

Question C.15 MEDICAL APPOINTMENT FOR CANCER

Inactive cancer check ups must be included.

Question C.16 RECENT TREATMENTS FOR CANCER

Check-ups for inactive cancer are not considered treatment. There are words that the respondent may use such as the following:

“Implanted seals” is radiation.
“Removed cells” is surgery or biopsy.
“Removed organ” is surgery or biopsy.
“Estrogen blockage” is chemotherapy or medication.
“Tamoxifeno” is chemotherapy or medication.
In this question you may include the medication taken for pain relief.

**Question C.17 CANCER TREATMENT**

Here is included medication for treating the cancer itself. Do not include medication for cancer-symptoms like nausea or pain.

**Question C.18 YEAR OF MOST RECENT CANCER DIAGNOSIS**

The year or age in which the last or only cancer was diagnosed. Remember that the respondent should provide any kind of information. In case they do not remember, try to remind him/her about events that can be related with a year. Remember that an approximate date is better than a DON'T KNOW.

**Question C.19 RESPIRATORY ILLNESS**

We are looking for chronic respiratory problems.

Asthma of any kind can be included in this question. A severe bronchitis, the kind that comes with a cold or the flu is not the same as a chronic bronchitis, since it only has temporal effects; therefore it should not be included.

If the respondent states having “symptoms” of emphysema, mark YES.

If the respondent has tuberculosis (also known as TB), or “pulmonary deficiency” mark YES.

**Question C.20 MEDICATION FOR RESPIRATORY ILLNESS**

If the answer to the previous question was affirmative, we will try to identify how serious is the problem with the following questions.

Question C.20 inquires about the use of any medication for the respiratory illness.

**Question C.21**

Question C.21 allows us to know if the respiratory illness limits the normal activities of the respondent. As normal activities we understand those proper of the age, like working, walking, exercising, or visiting relatives.

**Question C.22 HEART ATTACK**

Heart attack, or myocardium infarct, is the presence of dead or dying tissue on and/or around the heart, caused by the obstruction of the blood ducts.
Sometimes it is confused with other type of severe events, like fainting or chest pain.

Myocardium infarct is a painful and sometimes lethal incident caused by the blockage of one or more coronary arteries. A common term is “heart attack”.

Heart congestion failure is NOT a heart attack.

Brain hemorrhage or apoplexies, or TCI (transitory cerebral isquemia) is not a heart attack.

**Question C.23 RECENT HEART ATTACK**

If the answer to the previous question was affirmative, question C.23 will help us know how long it has been since the respondent’s last heart attack.

**Question C.24 and C.25 HEART MEDICINES**

If the answer to the previous question was affirmative, these two questions inquire if the respondent is taking medication for his/her heart-related problem.

Question C.24 inquires about the use of medication for his/her illness, while question C.25 confirms if the respondent carries with him/her any specific medicine for preventing a heart attack, or for chest pain.

**Question C.26 LIMITED NORMAL ACTIVITIES DUE TO HEART CONDITION**

Question C.26 help us know if the respondent has limited his/her activities because of his/her heart problem. As normal activities we understand those activities proper of the age, like working, walking, exercising, and visiting relatives.

**Questions C.27 and C.28 EMBOLISM CEREBRAL**

The word cerebral embolism is known also as stroke or apoplexy.

TIA (transient ischemic attack), referred sometimes as “mini-attack” is also classified as cerebral embolism.

In the case of an affirmative answer, question C.28 inquires if the respondent has contacted a doctor about this embolism in the last two years.

**Question C.29 SYMPTOMS DUE TO EMBOLISM**

Embolism usually leaves aftereffects on individuals. These aftereffects oftentimes result in difficulty to perform everyday tasks. Since this research wants to know
the level of functionality of individuals of middle and old age, in this question we inquire about the effects of the embolism in the functionality of the individual.

If the respondent hesitates about having suffered the symptoms of embolism, ask him/her if the symptom has been present most of the time lately, if this is not the case, write NO.

**Question C.30-C.33 QUESTIONS ABOUT EMBOLISM**

Question C.30 is about medication that helps alleviate the consequences of a stroke or to prevent future ones. Question C.31, in turn, helps us know if the respondent is receiving physical therapy as a result of the embolism.

Questions C.32 and C.33 help to know how recent the embolism occurred, and if his/her normal activities were limited because of the embolism. In C.32 we ask for an approximate date. In C.33, as normal activities as normal activities, those proper of the age, like working, walking, exercising, and visiting relatives.

**Question C.34 ARTHRITIS**

Arthritis is the inflammation, pain, or restricted movement of articulations or the back. Rheumatism is often used as synonym of arthritis.

Osteoporosis IS NOT arthritis, nor is carpal tunnel syndrome.

**Question C.35 RECENT DOCTOR APPOINTMENT FOR ARTHRITIS**

If the answer to the previous question was affirmative, this question will help us know if the respondent has medical contact to treat the illness. We inquire if the respondent has recently seen a doctor about problems related to arthritis or rheumatism.

**Question C.36 PAIN, STIFFNESS, OR SWELLING OF JOINTS**

This question inquires if there is pain, swelling or loss/diminution of movement in joints, like hands, wrists, elbows, arms, feet, ankles, knees, or legs.

**Question C.37 and C.38 MEDICATION FOR ARTHRITIS AND LIMITATIONS**

These two questions help us establish if the respondent is taking medication or treatment for arthritis, and to know if he/she has seen his/her daily activities limited because of the illness. , by normal activities we understand those proper of the age, like working, walking, exercising, and visiting relatives.

**Question C.39 OTHER ILLNESSES**
With this question we want to know if the respondent has had, during the last two years, kidney or renal infections, tuberculosis, or pneumonia. Remember that they must be illnesses diagnosed by a doctor or medical personnel.

**Question C.40-C.42 RECENT FALL**

These three questions help us know if the respondent has recently fallen down. In case of affirmative answer to C.40, C.41 and C.42 inquire about how many times has the respondent fallen down, and whether he/she has needed medical treatment in any of those occasions.

Medical treatment is some type of therapy, rehabilitation, or surgery, practiced by a physician. The *hueseros* (bonesetters) and other treatments alike are not considered. These questions refer to the last two years, approximately.

**Question C.43 FRACTURES AFTER AGE 50**

Hipbones include: Ileum, ischium, femur, pelvis, and pubis.

**Question C.44 and C.45 GLASSES AND VISION**

In C.44 we inquire if the respondent usually wears glasses, or contact lenses. Question C.45 refers to vision in normal conditions, this is, with glasses or contacts if he/she wears them.

In many cases, older people have difficulties seeing correctly even if they are wearing their glasses or contacts. This is because many of them keep wearing their same old glasses. This question helps us determine the functionality of the respondent in terms of his/her vision.

**Question C.46 and C.47 HEARING AND HEARING AID**

In C.46 we want to know if the respondent usually uses a hearing aid or auditory device. In C.47 we ask about the hearing/auditory range of the respondent under normal conditions; this is, with the hearing device, if he/she normally uses it.

These questions are similar to the previous ones, because many older people also have problems hearing correctly even if they are wearing their hearing aid. This is because many of them keep using their same old devices. This question helps us determine the functionality of the respondent in terms of his/her audition capability.

**Question C.48 to C.50 PAIN**

Question C.48 refers to pain in any part of the body, where the respondent defines pain. This is a completely subjective question, and it doesn’t involve any
medical diagnosis. This pain can be a consequence of several causes, including pain due to work, migraine, etc.

Question C.49 helps determine the intensity of such pain, in case of a previous affirmative answer. The intensity (soft, medium, or severe) is defined by the respondent.

Question C.50 refers to a respondent’s limitation in his/her daily life, due to such pain. Limitations in daily life don’t include sleeping problems.

In limitations, we exclude those regarding OTHER causes, for instance. This is because the respondent is in a wheelchair, or has arthritis and walks with difficulty.

**Question C.51 PREVENTIVE EXAMS**

In this question you will find a list of texts and lab analysis, which are done usually to detect health problems. Even when the doctor didn’t request the analysis, but the respondent has had them in the last two years.

Test for hypertension or high blood pressure includes the check of blood pressure by a medical personnel.

**Question C.52 DEPRESSION**

Depression may be common in older age people, and they can be associated with the present physical health conditions. A series of questions are asked to determine if the respondent has symptoms of depression.

Notice that the reference period is **last week**, and it refers to how the respondent felt **most of the time** during the previous week. Read each question verbatim and write down YES or NO.

**Question C.53 EXERCISE AND FREQUENT HARD PHYSICAL WORK**

The question captures if during the last two years, the respondent has exercised frequently. By exercise and hard physical work we understand sports, heavy house chores, or other physical work. These activities must include **continuous movement, for 20 minutes or more each time, with a frequency of three or more times a week**. This would be equivalent to run or jog for 20 minutes and lift weights for 20 minutes, during three or more times a week.

For example, if the respondent works as a mailman, this implies that he/she walks during long periods of time. Therefore, you must write YES. If the respondent works as a loader in a moving company, it also means that physical
effort is part of his/her job. Washing clothes by hand can be considered frequent exercise, because it requires continuous movement for more than 20 minutes.

Sweeping or mopping are not considered heavy physical work, since they don’t imply heavy movements unless this activities are performed as part of the job and for a long period of time during the day.

**Question C.54 HAVE YOU EVER SMOKE?**

In this question we refer to the consumption of nicotine. For this reason, all those who have smoked tobacco, pipe, or have not smoked more than 5 packs of cigarettes must be considered as not having smoked.

**Question C.55 CURRENTLY SMOKING**

If the respondent currently smokes, regardless of how much, mark YES.

**Question C.56 CURRENT AMOUNT OF CIGARETTES**

It refers to the number of cigarettes that the respondent smokes during a normal day, and the information can be given in cigarettes or packets. Consider that a pack has 20 cigarettes, and they can give you an approximate answer. If the respondent indicates that the amount varies, figure out an average.

**Question C.57 AGE WHEN RESPONDENT STARTED SMOKING**

If the respondent doesn’t remember how old he/she was approximately when he/she started smoking, help him/her remember with a related event. Example: When he was in junior high, high school, before or after getting married, etc. The information can be given as age (“when I was about 15”), or in a particular year (“about 1965”), or a time ago (“about 35 years ago”). If the respondent started smoking, quit, and retook it again, consider the first time he/she started.

**Question C.58 NUMBER OF CIGARETTES, WHEN SMOKING THE MOST**

For the people who don’t smoke but did it in the past, we ask how many cigarettes approximately did he/she smoke per day, when he/she smoked the most. Consider that each pack has 20 cigarettes, and you can get an approximate and “average” answer from the respondent.

**Question C.59 HOW LONG WITHOUT SMOKING**

For those respondents who smoked in the past, but no longer do, we ask how long ago did they stop smoking. Remember you may get an approximate number.
The information can be obtained in different ways, the number of years without smoking, the year when he/she quitted, or his/her age when he/she quitted. The respondent may answer in any of these ways, however he/she remembers best.

**Question C.60 to C.62 ALCOHOL CONSUMPTION**

With this series of questions, write down the given answers without forming an opinion about the respondent.

Even if the respondent drinks only one or two alcoholic beverages per year (in special occasions, for instance) mark YES.

Question C.61 indicates the frequency with which the respondent consumes alcohol, while C.62 determines the number of daily alcoholic drinks consumed by the respondent.

**One drink is equal to:**

- One beer of normal size (360 ml)
- One glass of wine of normal size (120 ml)
- One sip of liquor of 1 ounce (30 ml)

If there is still doubt on how to report alcohol consumption in number of drinks, consider that one drink can be one cup in general, and one liter contains 4 cups. This way, you may use the following conversion:

- 1 liter is equivalent to 4 drinks.
- ½ liter is equivalent to 2 drinks.

**Question C.63 NUMBER OF DAYS WITH HIGH ALCOHOL CONSUMPTION**

We try to find out how many days, during the last three months, the respondent consumed 4 or more alcoholic drinks. If the answer is “it varies,” try to figure out an average.

**Question C.64 ALCOHOL CONSUMPTION IN THE PAST**

With this question we find out if the respondent consumed alcohol in the past.

**Question C.65 CONSIDERING LOWERING CONSUMPTION**

This question is applied even to those not currently consuming alcohol, because even if they have stopped completely, they could have had an alcohol consumption problem when they were younger. This consumption of the past may be important for the current health of individuals of middle and old age.
When asking this question, remember to adapt it to the current conditions of the respondent, this is, if currently drinks ask: have you ever felt that you should reduce the quantity of drinks you have? But if no longer drinks: Have you ever felt that you should have reduced on the quantity of drinks you have had?

**Question C.66 and C.67**

Questions C.66 and C.67 inquire if the respondent feels or has felt annoyed because other people criticize his/her drinking; and if he/she feels or has felt guilty about it. Remember to adapt the question.

**Question C.68 ALCOHOL CONSUMPTION IN THE MORNING**

If the respondent drinks or ever drank in the morning to calm down or get rid of a hangover, this must be considered as an affirmative answer.

**Question C.69 CURRENT WEIGHT COMPARED WITH TWO YEARS AGO**

The question refers to the loss or gain of weight of 5 kilos or more. Change of weight of less than that amount is not considered for this question. Remember to adapt the question.

**Question C.70 DIET OR EXERCISES CHANGE**

We want to know if the respondent has tried to gain or lose weight by means of exercising or dieting in the last two years.

**Question C.71 and C.72 APPROXIMATE WEIGHT AND HEIGHT**

Remember that we only expect approximate measures of weight and height. In Section L (Anthropometric Measures) we will take weight and measures of some of the respondents. Ask this information even if the respondent has been selected to be measured in Section L.

**Question C.73 SYMPTOMS**

This question contains a series of symptoms that the respondent could have felt during the last two years. Each one of these symptoms indicates a specific health condition of the respondent and his/her functionality.

Remember that we are only interested in those symptoms present frequently. The presence of the symptom is identified by the respondent.

**Question C.74 MISSING BODY PARTS**
With this question we capture if the respondent misses some parts of his/her body, and also his/her degree of functionality.

**Question C.75 IN BED DURING LAST 12 MONTHS**

We want to know, approximately, how many days during the last 12 months the respondent had to stay in bed, at least half day, due to illness; or had to stay in a hospital.

**Question C.76 HEALTH PROBLEMS DUE TO WORK**

We want to capture whether or not the respondent has ever been told, by a doctor or medical personnel, that he/she suffered certain illness or health condition due to the type of work he/she did. Write YES when the condition was caused by an accident at work.

**Question C.77 RESPONDENT EVALUATION**

This question is never asked, it must be answered by the interviewer according to his/her own opinion. Write down if the respondent didn’t need help (NEVER), required little help (FEW TIMES), a lot of help (MOST OR, OR ALL THE TIME); to answer the questionnaire in this section.
5.6 SECTION D. HEALTH SERVICES

Coverage of medical services and medical expenses are a major issue for individuals of middle and old age, their relatives, and the population in general. We need to know in more detail about health expenses. How are they financed? How are decisions made about the use of services? And how these decisions may affect future decisions of this population.

The goal of this section is to obtain details about the medical attention that individuals of middle and old age have or could have, from the institutional service point of view.

We ask about several types of services they have used during the last 12 months, the expenses incurred in services and medication, how they have paid them, the options of the respondent regarding different service providers, and the criteria for selecting a provider.

FOR THE WHOLE SECTION, the questions about expenses refer to those actually paid by the respondent or his/her family, without including what the insurance or other institutions cover.

**Question D.1 MEMBERSHIP IN INSTITUTIONS**

This question inquires about the institution(s), where the respondent is member. There may be more than one option, since it is possible that the respondent is affiliated to more than one institution. For instance, to the ISSSTE (Mexican social security administration for the government workers) through his/her own job, and to the IMSS (Mexico’s social security administration) through his/her spouse.

In cases where the respondent answers that he is partially covered (for example, 50% of inpatient treatment), indicate YES, he/she has right to the service.

- IMSS – Excludes IMSS Solidarity
- ISSSTE - Includes state and federal clinics
- PEMEX, Defense, Navy – Includes any facilities of these government Agencies
- Private medical insurance – Includes physicians and other health providers that are not part of a government agency. Includes private hospitals and clinics, general and specialized doctors.

**Question D.2 REASONS FOR RECEIVING SERVICES IN INSTITUTIONS**
This question inquires if the respondent received services from the institution named in question D.1 because he/she is an affiliated worker, affiliated on his/her own, retired, spouse of insured person, child of insured person, or any other reason. Read the options until you get an affirmative answer for each institution of question D.1.

**Question D.3 CORROBORATION OF LACK OF HEALTH COVERAGE OR AFFILIATION**

This question helps corroborate the answer in D.1. It helps to confirm that the respondent really doesn't have rights to any medical service, through his/her self, or through his/her spouse or relatives. In case of an affirmative answer, ask about the type of medical service and correct question D.1.

**Question D.4 HOSPITAL STAYS IN THE LAST 12 MONTHS**

It refers to the total number of nights the respondent stay in a hospital, including all the occasions and reasons in which he/she was admitted. The period encompasses one year before the interview. If the person has been hospitalized, at least for one night, consider that he/she was hospitalized. We only expect approximate numbers and dates.

If the respondent doesn't remember the exact number, try to get an approximate number. Ask if they were more or less than 10 nights in total, or ask how many nights in each occasion.

**Question D.5 INSTITUTION WHERE STAY IN HOSPITAL TOOK PLACE**

It refers to the institution where the respondent was hospitalized. You may mark more than one option if the respondent declares being hospitalized more than once in different institutions. Circle all the options named.

**Question D.6 and D.7 HOSPITALIZATION EXPENSES**

It refers to the TOTAL expenses paid, INCLUDING ALL hospitalizations, in Mexican pesos. If the respondent says “nothing” write 00000. Expenses mean what was paid for everything; this includes room, medication, surgery and food during the hospital stay.

If the respondent doesn’t know or doesn’t provide information for D.6, make the rescue question D.7 to inquire the amount by categories.

**Question D.8 to D.10 MEDICAL SERVICES USED**

In this sub-section we inquire about the medical services used in the last 12 months. Notice the format of the tables included in the questions. We ask several
questions (listed in the lines) about different health services (listed in the columns). Ask the questions by columns, this is, take the first column, CURANDERO (folk healer), and ask questions D.8 through D.10 for that column, then the following column, and so on.

CURANDERO: We consider all visits to the curadero, either for check up or for attention for a specific health problem. Curadero includes all people denominated with such category, and also includes the hueseros.

HOMEOPATH: It refers to visits to the homeopath, either for check up, for attention for a specific health problem, or for any other type of visit. Homeopath includes all people denominated with such category, generalists and specialists, as well as professionals on medical attention.

DENTIST: It refers to visits to the dentist, either for check up, to replace or extract teeth, or other type of dental surgery. Dentist includes generalists and specialists, like dental surgeons, as well as professionals on dental hygiene.

OUTPATIENT PROCEDURES: They include any surgery done at the doctor’s office, and at the clinic or hospital in which the patient DIDN'T SPEND THE NIGHT.

MEDICAL VISITS: Include visits to the doctor or any other medical personnel, including nurses, clinics, and hospitals. Includes specialists like dermatologists, psychiatrists, eye doctors, as well as medical trainees, osteopaths, doctor’s aides, and general physicians. For this question, DO NOT COUNT visits to homeopaths, curanderos, yerberos (cure with medicines extracted from plants) since we have already asked about this.

Question D.8 VISITS TO … (TYPE OF SERVICE) IN THE LAST 12 MONTHS

It refers to the total number of times that the referred service was used during the last 12 months. If they didn’t use this type of service, continue with the next one.

Question D.9 and D.10 TOTAL PAYMENT … (TYPE OF SERVICE)

It refers to the total expenses they had to pay for these services, adding up all the times they used them. It refers to payments with “out-of-pocket” money, regardless of who paid them, the respondent or a relative. It excludes anything paid by a health insurance company or the company the respondent works for.

Question D.9 inquires about the amount paid in Mexican pesos. If the respondent answers nothing, write 000000 and go the following column. If the respondent doesn’t know or doesn’t provide any information in question D.9, ask the rescue question D.10 to get the information by categories.
**Question D.11 CONSULTATION WITH PHARMACIST**

We want to know if the respondent has consulted with a pharmacist about a health problem during the last 12 months. If he/she answers at least one time, this is considered a YES. Here we want to know about those times when the respondent went to ask for advice from the pharmacist about what to do or take, and not those times when he/she just went to buy prescribed medication.

**Question D.12 FAILURE TO USE MEDICATION DUE TO HIGH COST**

We want to know if the respondent, during the last 12 months, didn’t take a medication, or took fewer amounts than prescribed, due to its high cost. If this happened at least once, the answer is YES.

**Question D.13 SOURCE OF FUNDS TO PAY THE SERVICES RECEIVED**

With this question we want to establish who MAINLY paid for the health services used by the respondent: him/her self, his/her children, or someone else. The option “did not have expenses” refers to those cases where the respondent stated not having used any services or not having paid anything for the services received. We want to know the total amount of payments done during the last 12 months.

**Question D.14 CHILDREN THAT HELP PAY**

If the respondent states that any of his/her children paid for most of the expenses, this question establishes the registration number of such child(ren). Look for the number on the Household Roster if it is the case of a resident child, and on the Non-Resident Roster for other cases.

**Question D.15 LACK OF VISITS TO MEDICAL PERSONNEL**

With this question we want to establish if the respondent considers he/she didn’t go to the doctor when he/she had a serious problem during the last five years. “Serious problem” is according to the respondent’s opinion. If this happened at least once, the answer is YES.

Notice that the time period for this question is five years, which is different from the one used for the previous questions of this section.

**Question D.16 REASONS FOR NOT USING SERVICES**

Among those who reported in D.15 not having gone to the doctor, we want to know the reasons for such behavior. For each reason, the YES/NO options are offered as answers.
Read the first reason: “Thought that he/she would not help you get better.” “Would you say this was the reason, or not?” Write down the corresponding code. If the respondent doesn’t know, write 9; if he/she does provide information, write 8. Go on with the other reasons proposed.

**SERVICES SELECTION CRITERIA**

The following set of questions deals with the criteria used by the informant in selecting the type of medical service he/she uses. Questions refer to the type of provider they prefer, according to the kind of health problem they have.

**Question D.17 and D.18 PROVIDER SELECTION ACCORDING TO TYPE OF PROBLEM**

With this series of questions we try to establish the type of provider that the respondent looks for, according to the type of problem he/she has. We ask the respondent about the type of person or institution he/she would go to if he/she had a minor health problem, and to whom if the problem was serious.

Read question D.17 “to whom or where would you go if you had a minor health problem (such as a cold)?” Circle all the options indicated. Remember you should not offer the option NO ONE, and if the respondent reports going to the Red or Green Cross, you must fill out the corresponding space “other public service.” If the respondent indicates that he/she wouldn't go anywhere because he/she already knows what medicine to take, write SELF-MEDICATION.

Continue with question D.18: “To whom or where would you go if you had a serious health problem (such as heart attack)?” Read the option and circle all those that apply: IMSS, ISSSTE, etc. Remember that you must not offer the option NO ONE, and if the respondent indicates he/she would go to the Red or Green Cross, you must fill out the space “other public service.”

**Question D.19 BELIEFS ABOUT EVENTS IN LIFE**

The goal of these questions is to measure the level of control that individuals of middle and old age believe they have over their lives. That level of control may be associated with people’s health and well being.

Read the introductory text. Notice that there are four answer choices, and it may be necessary to repeat these choices more than once. Read the first question clearly: (D.19 a) “There’s no sense in planning a lot for the future” and add: “do you agree, somewhat agree, somewhat disagree, or disagree?” Circle the given answer, and continue with D.19 b.

**Question D.20 BELIEFS ABOUT HOW TO IMPROVE HEALTH**
These answers are the personal opinion of the respondent, don’t try to influence them. We want to know if in the very own opinion of the respondent, someone his/her age can improve his/her health by exercising regularly, controlling his/her weight, or on the contrary, it doesn’t matter what they do. Remember that we are looking for the very personal opinion of the respondent.

**Question D.21 to D.23 WEIGHT ON IMPORTANT DECISIONS**

The goal of this question is to measure another dimension of the control that people feel they have over their lives; we inquire on the case of couples. Again, we are interested in the personal opinion of the respondent.

We ask in D.21 who in the couple has more influence on important decisions. “Important decision” may be moving to another house, selling a property, or sending a child to study abroad.

If the respondent says they both have the same weight in making decisions, circle the option “ABOUT THE SAME.” If the respondent answers “it varies” or “depends on the issue,” ask him/her to answer according to what happens more frequently. If the respondent answers that his/her spouse already answered this question, explain to him/her that we are interested in both opinions separately.

Questions D.22 and D.23 go deeper into the issue. If they answered in D.21 that either one has more weight, we ask “much more” or “somewhat more.”

**Question D.24 RESPONDENT’S EVALUATION**

This question is never asked, it must be answered by the interviewer according to his/her own opinion. Write down if the respondent didn’t need help (NEVER), required little help (FEW TIMES), a lot of help (MOST OR, OR ALL THE TIME); to answer the questionnaire in this section.
5.7 SECTION E. COGNITION EXERCISES

The series of cross-cultural cognition exercises (ECCC for its Spanish acronym) was designed to briefly measure a series of basic cognition functions that are considered comprehensive to evaluate the memory and mental health of people. It includes eight cognition domains: attentiveness, language, visual-space capacity, verbal memory, visual memory, recent memory, abstraction, and psychomotor speed.

Different from other sections, this one focuses on obtaining information from the respondent through activities, instead of questions. Some of these activities show the cognition ability of the person, while others require more mental ability from the respondent, in order to be answered correctly.

We only use the first part of ECCC. The brief series of exercises, which last approximately five minutes, include activities that are particularly sensitive to all forms of cognition disabilities.

They have been designed in a way that no qualified personnel is needed for their application. It is required, however, that all respondents follow the instructions as uniformly as possible, in order for the evaluation to be as objective and comparable to other populations as possible.

The interviewer will only conduct the exercises, and the coder will later classify them.

Necessary materials

1) Pen or pencil for the respondent
2) Watch with seconds pointer or chronometer
3) Glasses for people with visual problem not corrected, this is, they need glasses but don’t have them.

Language

Before beginning the exercises, write down the language of the interview. If the language is Spanish, proceed with the interview. If the language isn’t Spanish, do not conduct this section.

Application

Since we are trying to evaluate the cognition ability of the respondent, you cannot allow the help from others. If you are in a situation where someone from the family wants to help, kindly explain that we need the respondent to do the exercises on his/her own. Explain that we are trying to measure the ability of the
person and mention that there are no right or wrong answers, they are just exercises.

To conduct the exercises, just follow the instructions provided, this is, read slowly and clearly. Repeat words if indicated, and follow the time limits given.

In the exercises where the respondent has to do something with a pen or pencil and there is a time limit, proceed to remove the pencil from the respondent when the time is up. If there is the case where the respondent doesn’t want to give the pencil back in the stated time, you may make the comment: “look how fast you did it, can you give me the pencil now?” If the person insists in continuing longer than the prescribed time, you can also give him/her a new pencil of a different color, so we can differentiate what he/she did on time from what he/she didn't. Make an annotation on the observations sheet for the coder, who will grade the exercise.

If an irregular situation arises, make an annotation for the coder, so he/she can take it into account when grading the answers.

Assume a neutral demeanor, and don't reflect the impression about how easy or hard the exercises are. This should be a fun section for both the respondent and yourself.
5.8 SECTION F. PARENTS AND PARENTS’ HELP

The goal of this section is to know the characteristics and amount of help given and received among the respondent’s extended family. The section refers specifically to the parents of the respondent.

The first part deals with the demographic and socioeconomic characteristics of the respondent’s parents, as well as his/her contact with them. The second part explores the monetary and in-kind assistance transferred within the extended family, particularly from the respondent and his siblings to their parents.

As parents we understand, the biological ones, but also foster and adoptive parents. In order to facilitate the understanding of section F, when asking about “parents” we refer to the mother and/or the father if they are still married. In those cases where the parents are divorced, we refer to the parents and their respective spouses. In the case where the respondent has been raised by parents other than the biological ones, for the purpose of this section, you must consider as his/her parents, those recognized by the respondent as such, who are generally the ones who provided him/her with food, education, clothing, and care during most of his/her childhood and youth. In other words, we refer to the parents or tutors of the respondent.

Question F.1 SCHOOLING OF MOTHER OR TUTOR

This question is similar to F.8, but in that one we will refer to the father.

This question captures in general the education of the mother or tutor of the respondent, regardless of being alive or not. The answer provides information about the characteristics of the person who raised the respondent. Other questions refer to the age of birth, if it is the case. If the respondents says not having met his/her biological mother and doesn’t recognize anyone else as tutor, write DON’T KNOW.

This question has elementary as reference for schooling level. The options are:

None................................................................. 1
Some elementary .......................................2
Completed elementary ............................ 3
More than elementary ............................. 4

The “none” option refers to not having gone through any elementary grade, “some elementary” is chosen when the father or mother have studied between the first and sixth grade of elementary, but they didn’t complete the sixth grade. “More than elementary” is any education completed after the sixth grade.

Question F.2 MOTHER OR TUTOR MIGRATION
This question is asked whether the mother is alive or not.

This question asks about the migratory experience of the mother or tutor. The goal is to find out if the mother or tutor lived or worked in the United States, for personal reasons. Remember to exclude short visits and tourism.

**Question F.3 MOTHER OR TUTOR ALIVE**

This question serves as a filter to adapt the incoming questions about the mother and the current or past relations between her and the respondent.

**Question F.4 AGE**

The age of the parents of the respondent, if they are alive, determines the demands for attention from the respondent. For this reason it is important to have this information, even if it is only approximate. Question F.4 refers to the mother, and F.11 to the father.

Age is defined as the number of years someone has lived from the date of birth until the time of the interview.

Read the full question, mentioning the name of the person.

If the answer is “don’t know,” help the respondent find an approximate answer, remember that there has to be an answer.

To figure out someone's age from the date of birth, you must subtract the year of birth from 2001 (current year).

Be cautious that the respondent answered in full years and not years that he/she will soon have. If the answer is “she turned 77” or “she is turning 78,” precise the answer by asking: “this means, she has 77.”

If the respondent doesn’t remember his parents’ age, use some life event; for instance, the age of the mother when the respondent was born.

**Question F.5 PARENTS’ FUNCTIONALITY**

This question refers to the respondent’s mother functionality. This determines the demands for help and time of the mother or father of the respondent. If the mother or father has difficulties getting dressed, this is, putting on the shoes, buttoning up the shirt or blouse; or has difficulties cutting or carving the food; or has difficulties bathing; then the answer is YES.

**Question F.6 CAN THE MOTHER STAY ALONE FOR ONE HOUR OR MORE**
We want to know if the respondent’s mother can stay alone, or if due to health conditions or disability, she needs someone accompanying her all the time.

**Question F.7 MOTHER’S AGE WHEN SHE DIED**

For those cases in which the respondent stated that his/her mother already died, this question establishes the approximate age that she had when she died. If the respondent doesn’t know the exact age, use a life event, like the year a grandchild was born.

**Question F.8 FATHER’S SCHOOLING**

This question refers to the highest education level reached by the father or tutor. For details about this question, look at F.1.

**Question F.9 MIGRATION OF FATHER OR TUTOR**

This question refers to the migration experience of the father or tutor. For details about this question, look at F.2.

**Question F.10 FATHER OR TUTOR ALIVE**

This questions serves as a filter to adapt the incoming questions about the father and the current or past relations between him and the respondent.

**Question F.11 FATHER OR TUTOR AGE**

The age of the parents of the respondent, if they are alive, determines the demands for attention from the respondent. For this reason it is important to have this information, even if is only approximate. This question is equivalent to F.4, refer to it for details.

**Question F.12 FATHER’S OR TUTOR’S FUNCTIONALITY**

This question refers to the functionality of the respondent’s father. This question is equivalent to F.5, refer to it for details.

**Question F.13 CAN THE FATHER STAY ALONE FOR ONE HOUR OR MORE**

We want to know if the respondent’s father can stay alone, or if due to health conditions or disability, he needs someone accompanying him all the time.

**Question F.7 FATHER’S AGE WHEN HE DIED**
For those cases in which the respondent stated that his/her father already died, this question establishes the approximate age that he had when he died. This question is equivalent to F.7, refer to it for details.

**Question F.16 to F.21 MARITAL STATUS**

The following six questions refer to the marital status of the father and the mother of the respondent, or the status of their relationship, in the cases where they no longer live together or either one has died.

For this purpose, we understand for “married,” couples who live together, being married or just in consensual union. If these people do not have a permanent partner, you must circle number 2 (NO).

For questions F.18 and F.19, which are asked only if both parents live, you first ask if they are married, by this we understand a legal matrimony or consensual union; and then you ask the question about sharing the same house or living on independently.

**Question F.22 FILTER**

This filter is for the interviewer to mark in the following page the column that will be applied, depending on which of the parents currently live and his/her residency condition. Follow the instructions given.

Questions F.23 to F.29 are asked by columns, and they apply only for the columns that were marked according to the filter in F.22.

**Question F.23 PLACE OF RESIDENCE OF MOTHER AND/OR FATHER**

This question refers to the place where the respondent’s father/mother/parents reside. This is important because it determines the type of relationships within the extended family.

By care facility we mean an old people’s home, where people receive medical attention and not only room and boarding. By retirement home we mean an old people’s home.

**Question F.24 ALWAYS SHARING THE HOME**

For those respondents who live with either one of their parents or both, this question captures if the respondent has always lived with them. It works as a filter for the following questions.
Vacation trips, work trips, visits to relatives or any similar event are not considered moving out of the parents’ home, because they do not imply a change of residence.

**Question F.25 MOVING IN TO LIVE TOGETHER**

We want to know if the respondent moved in with his/her parents, or his/her parents moved in with him/her.

This question and the next one help to establish the direction in which family support is given.

**Question F.26 TIME SHARING THE HOME**

This question establishes, for those respondents who haven’t always lived with their parents, since when they are sharing the home with their parents.

If an answer like “since last year” is given, confirm that they are talking about 2000, and mark 01. If the answer refers to a short period of time of one year or less, mark 01.

**Question F.27 FATHER’S OR MOTHER’S LOCALITY OF RESIDENCE**

For those parents who don’t live with the respondent, this question captures if they live in the same place of the respondent, or in a different city or country. This is an indicator of family cohesion, and of customs on elderly care that are inherited through generations. It also establishes the degree of physical proximity, which would facilitate mutual help.

**Question F.28 COMMUNICATIONS WITH FATHER OR MOTHER**

This question establishes how often does the respondent communicate with either of his/her parents, during the last two years.

The information is reported as an average, in terms of number of times per period. For example, if they report once a week, write 1 in TIMES and 1 in PERIOD, or if it is NEVER, write 0 in TIMES and 5 in PERIOD.

**Question F.29 ECONOMIC SITUATION OF FATHER AND/OR MOTHER**

This question inquires about the economic situation of the parents, according to the respondent’s opinion. Read the five answer choices: Excellent, Very Good, Good, Fair, and Poor.

RESPONDENT’S SIBLINGS
Questions F.30 to F.32 capture information about the respondent’s siblings.

**Question F.30 NUMBER OF SIBLINGS BORN ALIVE**

This question refers to the number of siblings born alive that the respondent has had; this is, regardless if they are alive or not. Consider as “sibling” any biological, half-, foster, or adopted sibling raised by the parents.

**Question F.31 NUMBER OF SIBLINGS ALIVE**

This question refers to the number of siblings alive within the total reported in F.30.

**Question F.32 HAS A SIBLING BEEN TO THE UNITED STATES**

We want to know if any of the reported siblings in F.30 has ever lived or worked in the U.S. Remember that short visits for vacations, business, or work are not considered.

**Question F.33 FILTER: AT LEAST ONE OF THE PARENTS LIVE**

**HELP GIVEN TO PARENTS**

**Question F.34 ECONOMIC SUPPORT TO MOTHER OR FATHER**

We want to know if the respondent (or his/her spouse) has helped the respondent’s parents during the last two years.

We exclude the case of the respondents living at their parents’ homes providing economic support in terms of rent and food. However, we include cases in which the respondent hasn’t necessarily economically supported but, for instance, has paid the rent of his/her parents’ house, or the food expenses of the parents in another house.

**Question F.35 AMOUNT OF ECONOMIC HELP PROVIDED TO PARENTS**

The amount of 5,000 pesos in two years is equivalent to an average of about 200 pesos a month. It refers to a total; this is, adding up the help provided to the mother and the father. Mark YES or NO.

**Question F.36 APPROXIMATE AMOUNT**

The question refers to the total amount, accumulated over approximately two years, that was received by the parents. Remember that we only need approximate numbers. If the respondent gives you the information in a different period, figure out the correct number for a two-year period.
Question F.37 HELP PROVIDED TO PARENTS WITH BASIC ACTIVITIES

We want to know if, during the last two years, the respondent or his/her spouse has helped either of the parents with his/her daily activities, like eating, showering, or getting dressed; due to a health condition of the parents. Write YES or NO. Do not include help like going to the store, transportation, etc.

The help in this question refers to that given for the functionality of the parents of the respondent, in order for them to perform their personal activities inside the house.

Question F.38 AT LEAST ONE HOUR A WEEK

This question applies to those who answered YES in question F.37. We want to know if the help provided lasted at least one hour a week, on average, which is equivalent to half day a month, or to a total of about 100 hours in the last two years.

Question F.39 WHO RECEIVED HELP

This question inquires who received the reported help: the father, the mother, or both. If the respondent states that sometimes he/she helped his/her mother, and others his/her father, write BOTH.

Question F.40 AMOUNT OF TIME PROVIDING HELP

This question inquires in more detail, for those who did help at least one hour, the total amount of hours. The information is collected in HOURS per PERIOD.

Question F.41 SIBLINGS HELPING PARENTS

This question is similar to F.34, but it asks if any of the respondent’s siblings have helped his/her parents.

We exclude the case of those respondents living with their parents and helping them economically with food and rent. However, we include those cases where the respondent did not give money to his/her parents, but paid their rent or food in a different house.

Question F.42 AMOUNT OF HELP OF SIBLINGS

This question is similar to F.35, but it asks about the help given by the respondent’s siblings to his/her parents.

Question F.43 WHO PROVIDED MORE HELP
This question provides information to compare the help provided to the parents by the respondent’s siblings and his/her own help. If all of them provided more or less the same help write “all equal.” If the respondent provided more, write “1.”

**Question F.44 HELP PROVIDED TO PARENT WITH BASIC ACTIVITIES**

This question is similar to F.37, but it asks about the help given by the respondent’s siblings to his/her parents.

We want to know if, during the last two years, the respondent’s siblings or their spouses have helped either one of the respondent’s parents with his/her daily activities, like eating, showering, or getting dressed; due to a health condition of the parents. Write YES or NO. Do not include help like going to the store, transportation, etc.

The help in this question refers to that given for the functionality of the parents of the respondent, in order for them to perform their personal activities inside the house.

**Question F.45 AT LEAST ONE HOUR A WEEK**

This question is similar to F.38, but it refers to the help provided by the respondent’s siblings. It applies to those who answered YES in question F.44. We want to know if the help provided lasted at least one hour a week, on average, which is equivalent to half day a month, or to a total of about 100 hours in the last two years.

**Question F.46 WHO RECEIVED HELP**

This question inquires who received the reported help: the father, the mother, or both. If the respondent states that sometimes his/her siblings helped his/her mother, and others his/her father, write BOTH.

**Question F.47 WHO PROVIDED MORE HELP**

This question provides information to compare the help given to the parents among the respondent’s siblings. If all of them provided more or less the same help, write “all equal.” If the respondent provided more, write “1.”

**Question F.48 and F.49 AGREEMENT AMONG SIBLINGS FOR THE PARENTS PERSONAL CARE**

These questions capture the relationship between the respondent and his/her siblings, in order to share the responsibility of taking personal care of their parents, in terms of the time that the care requires. Question F.48 asks if the
respondent has reached an agreement with his/her siblings. In F.49 we ask with how many of the siblings such agreement has been reached.

Question F.50 and F.51 AGREEMENT AMONG SIBLINGS FOR PARENTS’ ECONOMIC CARE

These questions are similar to the previous ones, but these ones ask for the economic needs of the parents; for instance, doctor bills, rent, food, etc. In-kind help must not be included in this question.

Question F.52 RESPONDENT’S EVALUATION

This question is never asked, it must be answered by the interviewer according to his/her own opinion. Write down if the respondent didn’t need help (NEVER), got little help (FEW TIMES), a lot of help (MOST OR, OR ALL THE TIME); to answer the questionnaire in this section.
5.9 SECTION G. HELP AND CHILDREN

Question G.1 WRITE DOWN THE RESPONDENT’S CODE

Write down who is answering this interview: the selected person (code 1) or the selected person’s spouse (code 2).

Question G.2 FILTER: CHILDREN ALIVE

This question establishes whether there are children alive or not. This determines the questions to be asked in this section.

Question G.3 TRANSFER OF GOODS TO CHILDREN

This question establishes if the respondent (or his/her spouse) has transferred valuable goods to their children or grandchildren, during the last 10 years approximately from 1991 until today. The goal of this question is to identify if younger generations have benefited from middle age and older generations. We understand by valuable goods all those goods that have an implicit economic value. Therefore, here we consider the total sum of transfers, businesses, deposits, real estate, etc.; that were given to the respondent or his/her spouse’s children or grandchildren, which must reach a value of 50,000 Mexican pesos or more.

Question G.4 WHICH CHILDREN RECEIVED GOODS

For those who transferred goods to their children or grandchildren, according to question G.3, this question asks which of the children received their parents’ goods. In the case of grandchildren, we ask about the parents of those grandchildren, and you must write down the line number of the children to whom they are related. Our goal is to determine if the transfers to certain children represent future obligations of those children to help their parents. In other sections we asked for the help and care received from the children.

Questions G.5 and G.6 ECONOMIC HELP PROVIDED TO CHILDREN

These questions inquire if the respondent or his/her spouse has provided economic help to any of the children, during the last two years. Here are included help to pay tuition, other education and medical expenses, to buy a house, etc. For this question, we don’t consider sharing the house with the children as help (this is considered in other question). We don’t consider either, when parents give property titles on a house to a child (this was already asked in G.3).

Question G.6 finds out if the help was for more than 5,000 pesos (200 a month). We are interested in somewhat considerable amounts, and this is why we consider 5,000 as minimal amount. If the respondent has several children but
gave that help to only one, the answer is still YES. If adding up the help given to all children comes to a total of 5,000 pesos or more, mark YES.

**Question G.7 to G.10 WHICH CHILDREN RECEIVED HELP AND HOW MUCH**

For those who stated having helped their children in G.6, this question asks which of the children received such help. In case the beneficiaries were the grandchildren, find out who their parents were. The goal is to determine if transfers made to some children create later obligation to those children to take care of their parents. Write down the number of such children on the first column of the table under question G.7. Locate the registration number in the Household Roster or the Non-Resident Roster.

Questions G.8 to G.10 inquire about the amount received by each child registered in G.7. Remember that we only expect approximate amounts, in pesos, and it refers to the total amount of economic help received for a particular child during the last two years. If the respondent doesn’t know, or doesn’t provide any information in G.8, go to rescue questions G.9 and 6.10 to get the information by categories.

**Question G.11 TIME HELPING CHILDREN OR GRANDCHILDREN**

We ask in this question if the respondent (or his/her spouse) have spent at least one hour a week helping their children or their immediate families; this is taking care of grandchildren and great grandchildren, as well as help cooking, shopping, etc. The goal of this question is to find out if generations of individual of middle and old age help younger generations.

The idea is to report help activities, for instance cooking for the children or in his/her house. We don’t consider as help when children come to the parent’s house as guests and they cook for them as such; we consider help in cases where the respondent (or his/her spouse) cook for the children he/she lives with, when parents and children live together. We also consider as help when children don’t live with the parents but they cook, take care of the grandchildren, etc.; in a regular form during the week; this is, the children or grandchildren ARE NOT occasional guests.

We ask if they have helped during the last two years with the future survey in mind, when we’ll interview them again in two years, so we will have the original question with the same time elapse of future surveys.

The period of “at least one hour a week” represents more or less 15 minutes everyday from Monday to Friday. If the respondent (or his/her spouse) takes care of any of the children 15 minutes or more everyday, then the answer is YES.

**Question G.12 WHICH CHILDREN RECEIVED HELP**
For those who have helped, according to what they declared in G.11, we ask here about which children received this help from their parents. The goal is to determine if the transfers to certain children translate into a later obligation of those children to take care of their parents. In other question we inquire about the help received from the children. Write down the registration number of the corresponding children. If the answer is that he/she helps all his/her children, mark code 781.

Questions G.13 and G.14 TIME HELPING CHILDREN IN DIFFERENT ACTIVITIES

This question captures with better detail the time spent by the respondent and his/her spouse helping their children (or their families). Write down the amount of hours, approximately, by PERIOD. If the respondent provides the information with a different periodicity, for instance, “every other day,” make the conversion to have the information in one of the provided periods, for example weeks. If the respondent doesn’t know or doesn’t provide information for question G.13, go to question G.14 to get the information by categories. Read the categories in G.14 and write down when you find an answer.

Questions G.15 and G.16 ANOTHER RESIDENCE

With these questions we want to know if the respondent lives part of the time somewhere else, different from the house you are doing the interview in. In G.15 we ask if he/she lives with any of his/her children. In G.16 we capture the line number of the children with whom the respondent lives part time.

Questions G.17-G.18 ECONOMIC HELP RECEIVED FROM THE CHILDREN

This question inquires if the respondent (or his/her spouse) has received economic help from his/her children, during the last two years. This includes help to pay the rent, medical expenses, or for buying a house. We don’t include as help when the respondent is sharing the house with his/her children (this is asked in another section).

The idea is to report somewhat considerable amounts; therefore G.18 asks if the help received exceeded 5,000 pesos as approximate number. If the respondent has several children but received this kind of help from at least one of them, then the answer is YES. If he/she received help from more than one child, report YES when the total sum of all help during the two years exceeds 5,000 pesos.

Questions G.19 to G.22 WHICH CHILDREN PROVIDED HELP AND HOW MUCH
For those who stated having received help from their children in G.18, we inquire here about the specific children that provided such help. In case the providers were grandchildren, ask about their parents (respondent's grandchildren). Our goal is to determine if the transfers from certain children represent later obligations from the parents, or if the children are repaying earlier benefits that they received.

Write down the registration number for each child on the first column of the table under G.19.

Questions G.20 to G.22 capture the amount given by each child registered in G.19. Remember that we only expect approximate amounts, in Mexican pesos, and we need the total amount given by the specific child during the last two years. If the respondent doesn't know, or doesn't provide the information, go to rescue questions G.21 and G.22 to get the information by categories.

**Question G.23 HELP AS FUTURE INCOME**

This question inquires if the respondent considers that the help received from each child will continue in the future in a somewhat steady way. Write YES or NO in the corresponding space.

**Question G.24 CORRESPONDING THE HELP**

We want to know if, in the opinion of the respondent, he/she will need to pay back the received help in any form, either in cash or in-kind; for instance, as an inheritance, or future favors.

**Question G.25 HELP RECEIVED FROM CHILDREN**

We refer to help that the respondent’s children (or their immediate families) provided given him/her (or his/her spouse) any time during the last two years. Remember that we only expect an approximate number. If the respondent states that he/she received help but only sporadically, like once a month, then don’t consider that help. If the respondent claims that it varies, inquire about what happens more often, or try to figure out an average. Remember that we are interested in somewhat substantial help; this is, help that on average will be of at least one hour per week.

**Question G.26 REGISTRATION NUMBER OF CHILDREN PROVIDING HELP**

If the respondent states that his/her children or their immediate families help him/her in G.25, this question asks which of them. Write the registration number for each child, up to three. Look up the number in the Household Roster or the
Non-residents one. If it is the case of a grandchild, find out the name of his/her parent.

**Questions G.27 and G.28 PARENTS AND RELATIVES IN NEIGHBORHOOD**

This question helps us know if the respondent has social networks close to home, besides from the people with whom he/she shares the household. Question G.27 asks if the respondent has relatives living in the same neighborhood, and G.28 finds out if the respondent has good friends in the neighborhood. The definition of “good friends” is left to the respondent’s own understanding.

Also allow the respondent to use his/her own definition of neighborhood, but in general it is the close-by area of the respondent’s house.

**Questions G.29 and G.30 INTERACTION WITH NEIGHBORS**

By neighbor we understand a person living in the area close-by to the respondent’s house.

These questions refer to the intensity of the social relations within the close-by area. These questions find out about the frequency of chats, visits and meetings with neighbors in a month. Remember that we only expect an approximate number. If the respondent uses a different periodicity, make the conversion.

Question G.30 measures how much can the respondent count on any of his/her friend-neighbors for daily activities. This is a personal impression of potential sources of help; the actual help must not have necessarily occurred.

**Question G.31 RESPONDENT’S EVALUATION**

This question is never asked, it must be answered by the interviewer according to his/her own opinion. Write down if the respondent didn’t need help (NEVER), received little help (FEW TIMES), a lot of help (MOST OR, OR ALL THE TIME); to answer the questionnaire in this section.
5.10 SECTION H. FUNCTIONALITY AND HELP

The goal of this section is to establish the degree of functionality of the respondent and the help he/she receives, in terms of personal attention, in order to perform his/her activities.

This section is important to measure the disabilities dynamics within the middle age and older population. We have adapted a series of questions that have been tried and validated in other countries (and in certain Mexican subgroups) for measuring functionality, and we are trying to validate them for its use on the total Mexican population.

Regarding the questions on functionality, it is important to remember the following guidelines:

− When we ask if the person “has difficulty with” doing something, we mean a self-definition of difficulty. In other words, having difficulty is whatever the respondent understands by difficulty.
− The answer choices for the questions on difficulty include: YES, NO, CAN’T DO, DOESN’T DO. It is important to distinguish between these alternatives.
− For example, if a person is permanently using a wheelchair; he/she can’t, therefore, run a mile.
− For example, if a person never cooks a meal because he/she has someone that does it for him/her (their relatives or maid), then in the question about having difficulty for cooking a warm meal, write DOESN’T DO. The same criteria applies if the person has never run one kilometer.

First we ask about difficulties doing certain physical activities; then we ask about daily activities (walking, showering, etc.), and then we ask about the help received with the difficulties of the mentioned daily activities, the identification of the person providing help, and with which intensity. We conclude with other types of help and future help expectations.

DIFFICULTY WITH PHYSICAL ACTIVITY

Questions H.1 to H.13 inquire about the presence of problems in joints, legs and arms; by asking about difficulty with performing certain activities. Before moving on to the questions of this table, you must read loudly the introduction to the section, which appears in the first box: “Please tell me if you have any difficulty in doing each of the daily activities that I am going to read. Don’t include difficulties that you believe will last less than three months,” for instance, if somebody broke a leg and needs temporary assistance taking a shower.

The goal is to know if DUE TO A HEALTH PROBLEM, the respondent considers difficult doing certain things. Remember that “having difficulty with something” is self-defined by the respondent.
These series of questions are presented in a table. After reading the text at the top of the table, read the question line by line. To record the answer, you must circle the box corresponding to the respondent’s answer. We only admit one answer, if the respondents answer “sometimes,” ask what happens most of the time and proceed to classify the answer among the provided categories.

Each of the questions refers to “having difficulty.” If the respondent answers that he/she does have difficulty, but is able to do it, classify it under code 1 “YES.” If the respondent states not having difficulty, classify it under code 2 “NO.” If he/she mentions that he/she doesn’t do this activity, you must inquire why: if it is because the respondent can’t perform this task, mark code 3 “CAN’T DO.” If the respondent doesn’t customarily do this activity, or it is not necessary for him/her to do it, record 4 “DOESN’T DO.”

Circle the given answer (YES, NO, CAN’T DO, DOESN’T DO, etc.), and follow the skip patterns. For instance, start with H.1 and circle the corresponding code according to the received answer, follow the skip patterns to continue either with H.2 if the answer was NO (2), or with H.3 if the answer was YES (1), CAN’T DO (6), DOESN’T DO (7), DON’T KNOW (8), or DON’T ANSWER (9).

The following are some annotations to the questions:

**Question H.1 DIFFICULTY WITH WALKING SEVERAL BLOCKS**

“Difficulty” is whatever the respondent understands. “Several blocks” means more than two blocks.

**Question H.2 DIFFICULTY WITH RUNNING OR JOGGING ONE KILOMETER**

“Difficulty” is whatever the respondent understands. If the respondent doesn’t know or doesn’t understand what a kilometer represents, tell him/her that it is like “running or jogging for 10 to 15 minutes.”

**Question H.3 DIFFICULTY WITH WALKING ONE BLOCK**

“Difficulty” is whatever the respondent understands. One block refers to a normal block in urban areas; in rural areas it is about 200m.

**Question H.4 DIFFICULTY WITH SITTING FOR ABOUT TWO HOURS**

“Difficulty” is whatever the respondent understands.

**Question H.5 DIFFICULTY WITH GETTING UP FROM A CHAIR**

“Difficulty” is whatever the respondent understands.
Question H.6 DIFFICULTY WITH CLIMBING STAIRS

“Difficulty” is whatever the respondent understands. “Several flights” means climbing about 3-4 flights without resting.

Question H.7 DIFFICULTY WITH CLIMBING ONE FLIGHT OF STAIRS

“Difficulty” is whatever the respondent understands.

Question H.8 DIFFICULTY WITH STOOPING, KNEELING, OR CROUCHING

“Difficulty” is whatever the respondent understands.

Question H.9 DIFFICULTY WITH EXTENDING ARMS

“Difficulty” is whatever the respondent understands.

Question H.10 DIFFICULTY WITH PULLING OR PUSHING

“Difficulty” is whatever the respondent understands. It is important to make it clear that we mean a single-size chair in order to make reference to a reasonable weight.

Question H.11 DIFFICULTY WITH LIFTING OR CARRYING

“Difficulty” is whatever the respondent understands.

Question H.12 DIFFICULTY WITH PICKING UP A COIN

“Difficulty” is whatever the respondent understands. We really mean objects of the size of a one-peso coin.

Question H.13 DIFFICULTY DRESSING

“Difficulty” is whatever the respondent understands. If the respondent states that someone must dress him/her or that he/she doesn’t dress, mark YES. Don’t include occasional help that somebody receives; for instance, with a stuck zipper.

Question H.14 HELP GETTING DRESSED

If the respondent states that he/she must be dressed by someone else, or that he/she doesn’t get dressed, mark YES. Don’t include occasional help that somebody receives; for instance, with a stuck zipper.
DIFFICULTY WITH DAILY ACTIVITIES

This subsection, questions H.15 to H.19, applies only to those respondents who declared having difficulty in the previous subsection, with the exceptions of “jogging one kilometer” and “climbing several flights of stairs.” Notice the table format. The daily activities are listed by columns and questions are by lines.

Fill out the information by columns. This is, you must first ask all the questions about “WALK”, and then go on with the questions about “BATH,” etc.

Read the introductory text and begin with letter A. “Because of a health problem, do you have any difficulty … with walking across a room?” Write the code of the given answer.

Continue asking in the same column and ask question B. “Do you ever use equipment or devices such as a cane, walker or wheelchair (for walking across a room)?” Follow the skip patterns, and continue in a similar way. Do not ask the questions in the areas marked with stripes.

If they declare having any difficulty with B, go on with C. If the respondent is married, “does your spouse help you?” Question D, for married respondents, inquires if somebody else helps him/her, and for not-married ones if somebody helps the respondent.

The following are some annotations about the questions asked.

Question H.15 WALKING ACROSS THE ROOM

With this question we want to know if the respondent has difficulty waking across the room. By room we understand a closed space, with four walls, which can be a sleeping room, a dining room, a living room, or similar.

Questions H.16 BATHING OR SHOWERING

“Difficulty” is whatever the respondent understands. If the respondent answers that he/she needs special equipment like a seat or rails to hold on, that someone has to turn on and off the shower; that someone must help him/her getting in the bathtub or shower, or that someone has to bathe him/her, mark yes.

Question H.17 EATING THE FOOD

“Difficulty” is whatever the respondent understands. If the respondent answers he/she needs special equipment like a special vase or plate, or needs help cutting his/her food, that someone must feed him/her, or that he/she doesn’t eat at all, mark yes. If someone is fed through tubes, or through intravenous equipment, this means he/she doesn’t eat at all. Mark YES.
Question H.18 GETTING IN OR OUT OF BED

“Difficulty” is whatever the respondent understands.

Question H.19 USING THE TOILET

“Difficulty” is whatever the respondent understands.

Question H.20 FILTER: HELP RECEIVED

If the respondent answered he/she doesn’t get help with the mentioned difficulties, different from the spouse, then we omit the questions regarding the detail of who helps him/her, and continue on to H.26.

HELP WITH ACTIVITIES OF DAILY LIVING

Adapt the instruction according to the mentioned difficulties. For instance, if someone mentions only having difficulty with bathing, mention only this difficulty. It is important to find out if the help is received because he/she has some health problem or difficulty that impedes him/her the performing of such activities. In the case, where there is a maid available, but not as consequence of any difficulty or health problem, we consider that he/she doesn’t get help, and you must circle code 2 (NO).

These questions ask about details regarding the help received exclusively for the activities reported in the previous table. For each help provider, we ask his/her name, his/her relationship with the respondent, his/her number in the roster, the number of days in which such help is received, and the number of hours per day.

Questions H.21 to H.25 are presented in a table. For filling out the table, you must begin with H.21, which asks about the name or each of the persons providing help. You must first write down all the names, each one in a different line, and then proceed with the questions (H.22 to H.25) in a consecutive way for each person, writing the corresponding code in the boxes of the lines.

Question H.21 NAME

This question asks for the names of the people who help the respondent in any of the activities that he/she mentioned in the previous questions. You must write all the names before proceeding with the question. Write one name per line.

Question H.22 RELATION

This question asks about the relationship between the help provider and the respondent. You must register a single code in the box of the corresponding line.
Notice that some of the options refer to relatives (child, child-in-law, grandchild, etc), but options are also available for non-relatives: other person, paid person.

Question H.23 ROSTER NUMBER

This question refers to the number given to the person in the Household Roster, the Non-Resident Roster, and the siblings. If the person was not registered in any roster, write 666, as the registration number.

Question H.24 NUMBER OF DAYS PER MONTH THAT EACH PERSON HELPS

This question asks about the amount of time that each registered person helps the respondent. We intend to identify approximately the number of days per week. If the respondent answers with a different periodicity, for instance number of days per week, figure out the corresponding number per month (in this case, for instance, multiply the number of days per week by 4).

Question H.25 NUMBER OF HOURS PER DAY GIVING HELP

This question inquires about the number of hours per day that each registered person helps the respondent. Remember that we only expect an approximate number.

Regardless of the frequency with which someone helps, you must ask the number of hours per day that he/she devotes to the assisted person. For instance, if the person of interest only helps four times a month, we want to know: “when (NAME) helps you, about how many hours that he/she helps you?” If he/she answers that the number of hours varies, ask: “On average, how many hours would you say (NAME) helps you?” The answer must be written in a whole number, without fractions, so you must round off the number. For instance, if it is less than one hour, write one hour (01), If it is two hours and one half, write three (03). Remember that the number of registered hours can’t be greater than 24 hours.

DIFFICULTY WITH INSTRUMENTAL ACTIVITIES OF DAILY LIVING

The format and criteria to answer this subsection, questions H.26 to H.30, are similar to those in H.15 and H.20, about daily living activities. Apply those criteria in a similar way.

Notice the table format. Columns list the instrumental activities of daily living (MEAL, SHOPPING, MEDICINES, MONEY) and the corresponding questions are in the lines.
Fill out the information by columns. This is, your must first ask all the questions about “MEALS,” and then continue with the questions about “SHOPPING,” etc.

Read the introductory text and begin with letter A. “Because of a health problem, do you have any difficulty … preparing a hot meal?” Write the code of the given answer. Follow the corresponding skip patterns.

For instance, if the answer for letter A is YES, continue in the same column and ask question B “is this because of a health problem?” This question finds out if the help provided is due to a health difficulty or problem that impedes or obstructs the performance of such tasks.

If they declare having any difficulty with B, go on with C. If the respondent is married, “does your spouse help you?” Question D, for married respondents, inquires if somebody else helps him/her, and for unmarried ones, if somebody helps the respondent.

The following are some annotations about the questions asked.

**Question H.26 PREPARING A HOT MEAL**

Remember that “difficulty” is whatever the respondent understands. Through this question we find out if the person has any difficulty in preparing a hot meal. This involves performing several activities, including the flame control. Remember that the answer choices include: DOESN’T DO for those who have difficulty preparing a meal because they are not accustomed to doing it, or do not have the need; and also CAN’T DO because his/her health condition doesn’t allow him/her to do it, for example because he/she is in bed.

**Question H.27 GROCERY SHOPPING**

“Difficulty” is whatever the respondent understands. If the respondent answers that he/she cannot go alone because he/she uses special equipment, like a wheelchair, walker, or somebody else has to handle the money because he/she is no longer able to do it, or because he/she forgets where the grocery stores is, mark YES.

**Question H.28 TAKING MEDICINES**

“Difficulty” is whatever the respondent understands. When the respondent mentions that someone else must be around when he/she takes medicines, because he/she forgets about what to take or when to take it.

**Question H.29 MANAGING MONEY**
“Difficulty” is whatever the respondent understands. Remember that we want to know about difficulties due to health conditions. It may be that the respondent has difficulty because he/she is not accustomed to do it (DOESN’T DO), or due to lack of education (CAN’T DO).

**Question H.30 FILTER: HELP RECEIVED**

If the respondent answered he/she doesn’t receive help with the mentioned difficulties, different from the spouse, then we omit the questions regarding the details of who helps him/her (H.31 to H.35) and continue on to H.36.

**HELP WITH INSTRUMENTAL ACTIVITIES FOR DAILY LIVING**

Adapt the instruction according to the mentioned difficulties. For instance, if someone mentions having difficulty only with taking medicines, mention this difficulty only. In the case where there is a maid available, but not as consequence of any difficulty or health problem, we consider that he/she doesn’t receive help, and you must circle code 2 (NO).

This questions table is similar to that in H.21 to H.25. Use the instruction in a similar way. These questions ask for details about the help received exclusively for the activities reported in the previous table. For each help provider, we ask his/her name, his/her relationship with the respondent, his/her number in the roster, the number of days in which such help is received, and the number of hours per day.

Questions H.21 to H.25 are presented in a table. To fill out the table, you must begin with H.31, which asks about the name or each of the persons providing help. You must first write down all the names, each one in a different line, and then proceed with the questions (H.32 to H.35) consecutively for each person, writing the corresponding code in the box of the lines.

**Question H.31 NAME**

This question asks for the names of the people who help the respondent in any of the activities that he/she mentioned in the previous questions. You must write all the names before proceeding with the question. Write one name per line.

**Question H.32 RELATIONSHIP**

This question asks about the relationship between the help provider and the respondent. You must register a single code in the box of the corresponding line. Notice that some of the options refer to relatives (child, child-in-law, grandchild, etc), but options are also available for non-relative people: other person, paid person.
Question H.33 ROSTER NUMBER

This question refers to the number given to the person in the Household Roster, and the Non-Resident Roster. If the person was not registered in any roster, write 666, as registration number.

Question H.34 NUMBER OF DAYS PER MONTH THAT EACH PERSON HELPS

This question asks about the amount of time that each registered person helps the respondent. We intend to identify approximately the number of days per week. If the respondent answers with a different periodicity, for instance number of days per week, figure out the corresponding number per month (in this case, for instance, multiply the number of days per week by 4).

Question H.35 NUMBER OF HOURS PER DAY GIVING HELP

This question inquires about the number of hours per day that each registered person helps the respondent. Remember that we only expect an approximate number.

Regardless of the frequency with which someone helps, you must ask the number of hours per day that he/she devotes to the assisted person. For instance, if the person of interest only helps four times a month, we want to know: “when (NAME) helps you, about how many hours that he/she helps you?” If he/she answers that the number of hours varies, ask: “On average, how many hours would you say (NAME) helps you?” The answer must be written in a whole number, without fractions, so you must round off the number. For instance, if it is less than one hour, write one hour (01), if it is two hours and one half, write three (03).

Question H.36 RESPONDENT’S EVALUATION

This question is never asked, it must be answered by the interviewer according to his/her own opinion. Write down if the respondent didn’t need help (NEVER), received little help (FEW TIMES), or lots of help (MOST OR, OR ALL THE TIME); to answer the questionnaire in this section.
5.11 SECTION I. EMPLOYMENT

This section is applicable to all respondents.

The purpose of this section is to know the employment conditions of the respondent. The information in this section, together with the information obtained by the survey ENE-2000 about the household residents, will help us know the employment condition that may affect the health of individuals of middle and old age in Mexico. This section asks about the work history, the length and type of main occupation that the respondent has or had, as well as the benefit with which the respondent counts or counted. We also inquire about the pension that they receive and the way they perceive their own economic situation.

Throughout the section, employment or job refers to working activities with or without payment, excluding house chores, unless otherwise indicated. As is common-practice in employment surveys, even though house chores are work without payment, this kind of activity is excluded from the definitions of "job or work."

EVER HAVING A JOB

Questions I.1 and I.2 help us identify the people who have never worked in their lives, and therefore they wont be asked most of the questions in the section. Notice that if the person answers NO to I.1 and I.2, you must jump to question I.19.

Question I.1 HAVING A JOB

This question refers to ever having a job for payment in money or in kind. We are interested here only in those jobs done for payment, or for receiving a profit from a business, even if it was only part-time, in any moment of his/her life.

Question I.2 HAVING A JOB WITHOUT PAYMENT

This question refers to ever having a job without payment or profit. Usually, this kind of work is done for a family business; this is why the question refers to a business, farm, or parcel.

Question I.3 AGE WHEN FIRST JOB

We refer to the approximate age when he/she worked for the first time, with or without payment or profit. The information can be given as a year (for instance 1960), or as an age (at age 16). If the respondent has doubts about the age or the year, make test-questions to help him/her remember the information; for instance, when you were in high school? Or, one year before getting married?
Question I.4 TOTAL YEARS OF WORK WITH PAY

We are interested in the approximate total number of years throughout his/her life that the respondent worked, or has worked, receiving payment or profit. If the respondent had interruptions during his/her working life, for any reason, get the number or the years worked only.

CURRENT EMPLOYMENT

Questions I.5 to I.8 refer to the current employment of the respondent, finding out about the kind of job, the number of hours, work flexibility, and how similar are the activities performed today compared to the work he/she did throughout his/her life. These questions’ goal is to capture the current activity level and the degree of control over the current activity, so we can associate these conditions with the current health of individuals of middle and old age.

Question I.5 LAST WEEK’S ACTIVITY

With this question we capture the current activity condition of the respondent. We use the previous week as reference. Read the question and answer choices verbatim until getting an affirmative answer.

With this question we identify those who have performed an economic activity during the week previous to the survey, distinguishing them from those who did non-economic activities.

Economic activity is understood as any action directed towards producing a good (grow corn, raise animals, plant trees, extract minerals, produce furniture, clothing, machinery, etc.), or rendering a service for the market (repair vehicles, teach classes, sell or retail different products, prepare and serve food, transport people or things, generate and distribute electricity and water, offer medical services, etc.). Agricultural production and raising animals for the household members consumption is also included. It is worth mentioning that for this question we consider work, even when those activities were done without receiving any retribution, for instance, helping with a family business, with a home business, etc.

Non-economic activity are those done to satisfy personal or family needs or activities, like studying, house chores, etc. Activities of personal interest are also included (volunteering, etc.), as well as doing nothing for whatever reason.

When the respondent informs that the person performed economic activities, register the information about such economic activity. For instance, if a housewife, besides doing her house chores, works part time, consider this as work, and write code 1. If it is the case of a student, who the week prior to the interview worked part time, write code 1.
Here is the description for the answer choices for this question.

**Worked**

In this option we classify people who worked or helped to work, at least one hour a week, in an institution, company, business or family premises, on the street, among other places; regardless if they were paid, remunerated or made a profit.

It also includes people who helped in agrarian activities, or raising animals, for sale, for farm work, or for the consumption of household members.

We classify under this category also, people that during the week of reference attended their business, even if their products or services were not bought by anyone.

**Had work but didn’t work**

It includes people who have a job, but didn’t work last week temporarily, for any of the following reasons:

- Sickness or accident (temporary incapacity)
- Permit, leave of absence, or vacations for a certain time (for instance, someone with maternity leave)
- Strike in the workplace
- Malfunctioning of machinery, instrumental equipment or work vehicle
- Lack of raw material to do the job
- Work interruption due to weather, lack of rain, etc.
- Waiting for the start of or already finished the harvest time or other agricultural task.

The characteristic of people classified here is that they don’t lose their jobs because of their absence (this is, they are not unemployed), and for this reason, they are sure they will go back to their jobs as soon as their days of permit, leave, vacations, incapacity, etc. are over.

In this option we also include all those who, in the week prior to the interview, volunteer for community or social work, but they have a job. For example: peasants assigned to be part of a commission in a community or ejido (Mexican system of cooperative farming).

**Looked for a job**

This option helps to define the economically active population of the sample. All the people who work or are looking for a job during the week prior to the interview define this population segment.
Student………………………………………………………………………….4

It captures the people who are registered or attend an educational institution in order to learn, whether it be in the basic (elementary or secondary), medium (high school), or higher (professional) education systems, or in any of the technical or commercial education levels.

Devoted to house chores……………………..5

It includes people devoted to the care or their homes. It also includes the relatives who help with the house chores.

Didn’t work……………………………………………………………..6

These are the people who don’t have a job, and didn’t look for one during the last week. It also includes:

- People of old ages who are permanently retired, pensioned, or disabled for several reasons.
- People who live from rent or investments. If they informed you that the person lives from the rent of a house, building, etc.; but also manages his assets or his business’ assets (charge rent, make receipts, ask for permits, etc.); classify him/her on option 1 (worked).
- Beggars, bums, or people who don’t look for a job, as well as those who have never worked.
- People who provide support as volunteers in charitable activities (national volunteers), or are affiliated to a political, religious, or civic organization. If this activity is paid, classify it in option 1 (worked).

Classify under option 1, people who answer something similar to the following: does house chores, but also sells fruits; studies in the morning, and helps the carpenter in the afternoon; is retired, but sells make up. Give preference to the economic activity, even if the person devotes few hours to it, or doesn’t receive payment for the job done.

If after reading all the options the person still doesn’t know, write 9 DON’T KNOW. Be persistent and try to get an answer.

Question I.6 NUMBER OF HOURS WORKED IN A NORMAL DAY

This question asks about the number of hours that the respondent works in a normal day, which can be during weekdays or during the weekend, according to the nature of the job. We only expect an approximate number. If the person provides information on weekly basis, and tells you he/she works five days a week, figure out the number for a normal day dividing by 5.
Question I.7  POSSIBILITY OF REDUCING THE NUMBER OF WORKING HOURS

This question inquires about the possibility that the person has in reducing the working hours, even if this means reducing the wages he/she receives. With this question we want to know to what extent individuals of middle and old age can reduce the number of hours they work, without losing their jobs.

Question I.8 CURRENT ACTIVITIES COMPARED WITH ACTIVITIES THROUGHOUT HIS/HER LIFE

This question captures if the activities performed in their current jobs are similar to those performed in their jobs throughout most of their lives. The idea is to know if the current activities are comparable to those performed by the respondent throughout most of his/her life. The following questions ask about those activities.

ACTIVITIES THROUGHOUT LIFE

Questions I.9 to I.14 refer to the principal job performed throughout his/her life. We want to inquire about the working conditions of the people throughout most of their working lives. For those people who still work and are doing activities similar to those done throughout most of their lives, questions may refer to their current job. If the respondent no longer works, or works in something different to what he/she has done most of his/her life, ask him/her to think about their longest job and consider that one as the main job.

If the person has or had more than one job, ask him/her to refer to the main one. Define main job as the one at which he/she spends more hours, or the one from which he/she gets most of his/her revenue.

Questions I.9 and I.10 OCCUPATION AND POSITION

These questions refer to the position held by the respondent and the kind of occupation he/she had, throughout most of his/her life. These questions provide information about the level of control the respondent has or had over his/her job. Question I.9 asks about the occupation, and I.10 about the position.

Questions I.11 and I.12 PLACE OF WORK

These questions inquire if the person worked most of his/her life in a store, as an indicator for health risk factors. Question I.11 captures whether or not he/she worked in a store, and I.12 asks about the kind of store. For instance, if someone has been a salesman for 20 years; but was a street-salesman for 5 years, and
spent 15 in fixed stores, then the person must declare that most of the time was in a store, and the corresponding type of store.

Ask the question verbatim, give the respondent time to answer whether he/she had or did not have a store; ask for specifications in either case, this is, how the store is called or where did he/she do his/her activities, and classify them according to the provided options. In case of doubt, ask supporting questions to find the correct classification. When due to imprecision, or wrong understanding of the respondent, the classification in the first part was wrong, go back and correct it.

STORE: It refers to the place where the usual activities of a business are performed.

BUSINESS WITH STORE: It refers to the economic unit that, in order to carry out its activities, has a fixed place, fenced or covered, which is generally built with wood, stone, etc. This can be contiguous to a house but independent.

BUSINESS WITHOUT STORE: It refers to the economic unit that, in order to carry out its activities, doesn’t have a fixed place, and is built with permanent materials. That's the case of street salesman and those who do their activities at home.

**Question I.13 TOTAL TIME DEVOTED TO MAIN ACTIVITIES**

This question refers to the accumulated number of years devoted to the activities of the main job, throughout life. For instance, if someone has been a teacher during most of his/her life, but with interruption periods, working for different schools, sometimes on a part time basis, and sometimes full time, the person must add up to figure out the total amount of years that he/she has been a teacher.

**Question I.14 EVER WORKED IN THE U.S.**

This question asks if the main job throughout the life of the respondent was ever carried out in the United States. We want to find out if part of the time devoted to the main activity was in a different environment, where he/she was exposed do different factors. In other parts of the questionnaire we inquire about the length of time the person was in the United States.

**FRINGE BENEFITS**

Questions I.15 to I.18 refer to the benefits that are obtained with the job(s) currently or formerly held.

**Question I.15 PENSION CONTRIBUTION**
With this question we want to know if the person knows that he/she is or was contributing to a pension plan, or for his/her retirement. We want to know if the person ever contributed to a retirement or social security plan. The contribution could have been directly (auto subscriber) or through an employer. If the person doesn’t know if a contribution was made, write this down, the fact that he/she doesn’t know is important.

Take into account that some people don’t know they are contributing to a retirement plan. For instance, if the person doesn’t know that he/she contributed to a pension, but he/she was given social security at work, write DON’T KNOW. In other questions we ask if the person had social security, which means he/she did have benefits of pension contribution.

For the purpose of this study, pension is equal to retirement.

**Question I.16 NUMBER OF YEARS CONTRIBUTING TO A PENSION PLAN**

This question refers to the number of years contributing to a pension or retirement plan. We capture the total number of years contributing, regardless of how, on his/her own or through his/her employer.

**Question I.17 BENEFITS RECEIVED**

This question captures if the main job throughout the respondent’s life gave him/her certain benefits. Mark YES even if the benefit was perceived during a short period of time. Since we are interested in what they could have received throughout their lives, and we consider different types of benefits, it is possible to say yes to more than one option.

“Afores” accounts are individual accounts within a pension or retirement plan. We want to know if the respondent or his/her employer made contribution to an individual account for retirement. This is independent from receiving benefits from other systems like ISSSTE or IMSS. When the respondent receives (ed) a benefit from work abroad, write it down in “other”.

**Question I.18 GETTING IMSS BEFORE 1997**

This question asks those who stated having received IMSS benefits, if those benefits were received before August 1997. This is the approximate date in which the (Mexican) social security system was reformed. We only want to know if the benefits were received under the old social security regulations.

**Question I.19 ECONOMIC SITUATION**
This question asks about the general economic situation according to how it is perceived by the respondent. The information we look for is on a personal impression basis, and not necessarily as a comparison with another person or family. Read the options and write an answer.

**Question I.20 RESPONDENT’S EVALUATION**

This question is never asked, it must be answered by the interviewer according to his/her own opinion. Write down if the respondent didn’t need help (NEVER), got little help (FEW TIMES), a lot of help (MOST OR, OR ALL THE TIME); to answer the questionnaire in this section.

**CONTROL OF INTERVIEW**

Along the whole questionnaire, we find these controls that allow us to correctly fill out the questionnaire; since, due to its design, some sections are answered only by one of the respondents (for couple interviews). Other sections, like J and K, if the respondent decides so, can be answered by another person well informed; for this case you must get the information of this person.

For the correct use of these controls, it is necessary that you read and follow the instructions provided, as well as the skip patterns. Each control is different and has its own instructions.
5.12 SECTION J. HOUSING

In the case of single household interview, conduct section J and K with the respondent. This section and section K are conducted with only one member of the couple. The election of respondent between the two members of the couple will be done according to the preferences of the couple, expressed before starting this section.

In these two sections, due to the economic nature of the questions, we need the experience of the respondent in getting the information, since it is common that the respondent will feel uneasy with this kind of topics. This uneasiness is often due to the lack of information on the economic aspects of the family. For this reason, for sections J and K, allow someone else from the household to help the respondent answering the questions. For instance, in the case of old age widows it is common that a child that lives with her is more aware of the information.

Section J’s goal is to collect data about the housing conditions of the respondent. Housing is a very important part of the well being of older people for two main reasons: a) Because its value represents a big fraction of an old person’s assets, and b) because housing characteristics affect their quality of life.

We ask about the condition of the house to evaluate if it matches the physical needs and disability characteristics of the respondent and his/her spouse. We also ask if the respondent and his/her spouse own a main house, and a secondary one, and their net worth, this is, subtracting the debts. We consider up to two properties: main residence and second or secondary residence. We ask more details about the main residence, mainly about the services it provides, the property title, and expenses and taxes that bears its tenancy.

**Question J.1 RESPONDENT’S CODE**

Write down if the respondent is the selected person (code 1), or the spouse (code 2), or other (code 3).

**HOUSING CHARACTERISTICS**

**Question J.2 and J.3** Answer by observation.

**Question J.2 TYPE OF HOUSE**

This question refers to the type of structure or building where the house is located.

**Question J.3 ELEVATOR IN THE BUILDING**
This question only applies when the house is an apartment or attic. We want to know if the building has an elevator.

**Question J.4 NUMBER OF STORIES**

This question captures if the building has one or more stories. We need this information to later find out about the access to the rooms of the house by people with health problems.

**HOUSING SERVICES**

The series of questions about the services available in the house aims at describing the sanitary conditions in which people live, and to know if the lack of some services can affect the health condition of individuals of middle and old age.

**Question J.5 TYPE OF WATER SERVICE**

This question refers to the kind of access to water that the house has. Read the options and mark the corresponding answer.

The water provision network is a piped installation that is planned and built to provide water to houses, buildings, and others. It is not necessarily an underground installation based on pipes; it can be superficial, regardless of the material with which it is made.

There are four answer choices: The first three for houses which have the service, and the last one for those which don’t.

- **Piped water inside the house**: It has at least one faucet inside one of the rooms. This criterion is mentioned only when the respondent has doubts.

- **Piped water outside the house but within lot**: It has a faucet only in the front or back yards, or in the garage.

- **Other piped water**: The water is obtained from a different source, like public faucet, hydrant, public-use water outlet, or carried from other house.

- **Non-piped water**: The way in which the water is obtained can be tanker, well, river, lake, or other. When the house has installations for piped water but has never worked, consider that it doesn’t have piped water. Also, if they answer that they get the water in two or more ways, for instance from the neighbor and from a tanker, ask them to report the one used more frequently.

**Question J.6 TYPE OF SANITARY FACILITY**
With the answer to this question we are able to measure the quality of sanitary service that the respondent has access to. In this question IT DOESN’T MATTER if the sanitary facility is shared.

The question identifies if the house’s occupants have a sanitary facility, regardless of the kind. The facility is usually called by different names that do not necessarily represent its technical characteristics. However, they can be classified as:

− A hydraulic device that works with water, this is, an installation that allows to eliminate the sewage, it is usually called toilet, W.C., sanitary, etc.
− A confinement deposit, this is an installation that doesn’t eliminate the waste, but accumulates it. In general, it has a limited life, and is built outside the rooms or the house. It is usually called latrine, black hole, blind well, or septic tank.

Read the options until getting an affirmative answer and circle the corresponding code.

**Question J.7 FACILITY FOR THE EXCLUSIVE USE OF THIS HOUSE**

This question asks if the toilet, if there is one, is for the exclusive use of the people living in the house.

**Question J.8 FUEL USED TO COOK**

This question refers to the kind of fuel mostly used for cooking. Where there is a stove, ask if it is electric, gas, or oil.

**Question J.9 INSECTICIDE IN THE HOUSE**

The question captures if the house regularly has insects inside, and if they regularly use some chemical product to combat them. Notice that the questions make emphasis in the existence of these conditions regularly, this is, we are not interested in the cases were insects are very sporadic, and fumigations take place every once in a while.

**Question J.10 DURABLE SERVICES OR GOODS**

This question captures if the house where the respondent lives has durable services or commodities: radio, television, fridge, washer, telephone, and water heater. In this question we are not interested in the number of goods; circle only 1(YES) or 2(NO) for each type of good.

**Question J.11 TENURE**
This question refers to the type of tenancy of the house.

**Rented:** it is when the occupants pay an amount of money to live in the house without property rights.

**Borrowed:** It is the case when the occupants live there, regardless of having borrowed it or not, and they are not paying for it.

**Your property or paying it off:** It is the case when the occupants are paying or have paid for the house, regardless of who are they or were they paying to.

**Question J.12 and J.13 MONTHLY RENT**

The goal is to find out how much the respondent-tenant is paying for rent when they are renting the house (answered 1 in J.11). Question J.12 registers the amount when this is proportionate. Remember that we only expect an approximate answer. Question J.13 is conducted with those respondents who don't provide a number in J.12, and it is designed to get an amount by categories.

**Capturing amount by categories**

In case the respondents do not provide quantities in numbers, the questionnaire provides a series of questions to find a quantity by categories. This question will help to later figure out a numeric quantity. Notice that this way of asking may be different from that used in other surveys. We ask two consecutive answers, instead of providing the categories of groups in a single question. We start with a test-question asking if the number is bigger or smaller than an intermediate amount (YES or NO), and depending on the answer we move to a question on a bigger or smaller amount.

**OWNERS**

For those respondents who stated owning the house or living without payment (this is answers 2, 3, or 7 to J.11), we inquire about the property value through a series of questions. We also want to find out who is the owner of the house. In case that it is a relative of the respondent, we ask for the kinship, since this information helps establish how the family network helps individuals of middle and old age.

**Question J.14 PROPERTY TITLE**

This question asks about who appears on the property title of the house, in order to know whether it belongs to the respondent or his/her spouse or not. With this question and later ones, we want to quantify the value of the assets own by individuals of middle and old age.
The option "there is no title (it is irregular)" should be used for those cases where the respondent states that nobody is registered as the property owner. Mark this option even if the respondent claims that they are in the process of regularizing the title.

**Question J.15 and J.16 OWNER’S KINSHIP**

This question refers to the kinship relation between the person who appears in the property title and the respondent. Notice that three spaces are provided in case there are multiple owners of the house.

Question J.16 refers to the name and number line of the person declared in J.15, in case one of these persons is registered in the rosters. Write down the person’s name and fill in the line number from the rosters. If the declared person is not in the rosters, write 666.

**Question J.17 TENURE STATUS**

This question establishes whether the house is completely paid off or not. The goal is to later ask about the amount owed, to whom it is owed, and if they are in the process of paying it off.

Here we also capture who they owe for this property. “Being paid to the bank” refers to the loans being paid to any financial institution, including savings banks, etc., and other institutional ways of financing a loan different from a relative or friend.

**DEBT ON PROPERTY**

These series of questions establish the amount owed for the property. The purpose of these questions is to later subtract the debt figure from the gross value of the property and establish the net value of the assets of individuals of middle and old age.

**Questions J.18 and J.19 MONTHLY PAYMENT FOR THE HOUSE**

These questions refer to the amount paid for the house’s mortgage. Remember that we only expect an approximate figure. If the respondent provides the information with a periodicity different to a monthly basis, for instance biweekly, figure out the monthly equivalent. If the respondent doesn’t provide an answer in J.18; J.19 ask for the information on categories.

**Questions J.20 and J.21 DEBT ON PROPERTY**
We inquire about the amount of debt on the property. Question J.20 asks about the total amount of debt, remember that we only expect an approximate answer. Question J.21 asks about categories in case the respondent doesn’t give an answer in J.20.

**Question J.22 PERIOD TO PAY OFF**

This question captures how long it will take the respondent to pay off the debt on the property. This information, combined with the one on monthly payments, will help estimate the total debt amount, for those cases where the respondent didn’t provide or didn’t know the information about the total in J.20 and J.21.

**Question J.23 and J.24 GROSS VALUE OF THE PROPERTY**

These questions refer to the estimated value of the property, without considering the amount owed for it. Remember that we only expect an approximate value. Question J.24 asks about the value by categories for those cases where the respondent didn’t provide information in J.23.

**Question J.25 INHERITING THE PROPERTY**

This question captures if the property was obtained through an inheritance. The goal of this question is to know if the assets of individuals of middle and old age were received through family networks in order to know the way in which family networks and different generations provide help among them. The answer choices ask which of the spouses inherited the property. This answer also provides information on possible ways in which generations may feel obliged to help others in the future based on their past experience.

**Question J.26 SECOND PROPERTY**

This question inquires about the existence of another property, besides the one in which the interview is taking place that belongs to the respondent or his/her spouse. This question excludes properties yielding income like houses for rent, since we ask about these properties in another section of the questionnaire. We are interested here in another property, including shared –time, that can be considered as assets of the respondent and his/her spouse.

**Questions J.27 and J.28 VALUE OF THE SECOND PROPERTY**

These questions inquire about the net value of the second property, this is, taking the current value and subtracting the outstanding debt on the property. J.27 asks directly for an amount. Remember that we only expect an approximate value. Question J.28 asks for the value by categories when the respondent didn’t provide a number in J.27.
Question J.29 RESPONDENT’S EVALUATION

This question is never asked, it must be answered by the interviewer according to his/her own opinion. Write down if the respondent didn’t need help (NEVER), received little (FEW TIMES), a lot of help (MOST OR, OR ALL THE TIME); to answer the questionnaire in this section.
5.13 SECTION K. PENSION, INCOME, AND ASSETS

In the case of single household interviews, conduct both section J and K. Both sections are conducted with only one member of the couple. The election of respondent between the two members of the couple will be done according to the preferences of the couple, expressed at the beginning of section J, in the INTERVIEW CONTROL sheet.

In these two sections, due to the economic nature of the questions, we need the experience of the respondent in getting the information; since it is common that respondents will feel uneasy with this kind of topics. This uneasiness is often due to the lack of information about the economic aspects of the family. For this reason, in this section, as for J, allow someone else from the household to help the respondent answering the questions. For instance, in the case of old age widows it is common that a child that lives with her is more aware of the information.

The goal of this section is to collect data about the respondent’s assets, their value, as well as the sources and amount of income. In general, to know someone’s economic situation we measure income only. However, with older people in particular, income can be scarce or non-existent, since people tend to no longer participate in the labor market. For this reason, accumulated assets give a better assessment of the conditions of current and future economic well being of older people.

We ask about the assets in the form of businesses, real estate ownership, capital assets, and sources of income of the respondent and his/her spouse. Adapt the questions for the cases of interviews without spouse (single interview), and only ask about the respondent’s information. In terms of sources of income, we ask about businesses, leased properties, work, pension, and transfers from institutions or relatives.

Through the section, when we ask about income from several sources, and the respondent wonders whether they are before or after taxes, explain that we mean net income, free of taxes, this is what is really left to the disposal of the respondent, unless otherwise indicated. It is also important to remember, that all income amounts asked throughout the section refer to last year’s income, unless otherwise indicated.

BUSINESSES

Question K.1 to K.4 refer to businesses of the respondent or his/her spouse. We mean by business the economic unit aimed at producing goods or services to profit someone or a group of people, and that has its own value with the intention of making a profit. It can also be the case of land for agriculture or growing animals, with commercial purpose; in other words, they are produced or raised to
be sold. For the case of sharecroppers, capture them as business owners, and ask the corresponding questions, taking him/her in K.2 as owner and adapting the subsequent questions. Consider here also people who lend money for business.

**Question K.1 BUSINESS OWNER**

This question asks if the respondent or his/her spouse owns a business. This serves as a filter for the remaining subsection, if the respondent answers NO, you must jump to question K.15.

Notice the format of questions K.2 to K.14, which is a common one for this section. Notice that in the subsection of business (questions K.2 to K.14), there is room to report details up to two businesses (two columns). Fill out this part by columns, this is, asking all the questions about one of the businesses, and then ask the questions about the other business (if there is more than one).

**Question K.2 WHO IS THE OWNER**

This question establishes whether the respondent is the sole owner of the business, his/her spouse, or both. This question is useful to determine the access to assets that each spouse has, which can be, in turn, an important indicator of economic security and position within the household, mostly for older women.

**Question K.3 BUSINESS DEBTS**

This question captures if there are debts on the businesses, in other words, if they owe something. The goal of this question is to later allow us to deduct the value of the debt to the total value of the asset, and obtain the real net wealth of the respondent. We are not interested here to whom they owe, but whether they owe at all or not.

**Question K.4 and K.5 DEBT AMOUNT**

These questions refer to the amount owed. Remember that we only expect approximate amounts. Write down the information in pesos if the respondent provides it in K.4. If he/she doesn’t know or doesn’t answer, ask the rescue question K.5 to get the amount by categories.

**Question K.6 and K.7 WHO DO THEY OWE**

These questions inquire to whom do they owe. The goal is to capture, on one hand, if individuals of middle and old age use credit institutions for their financial needs; and, on the other hand, we are interested in knowing if the family and
friends networks help the elderly through supporting businesses and other economic means.

Question K.6 inquires if they owe to relatives, friends or institutions like banks. Consider in the banks option, any formal institution that grants credits in a formal written manner, like commercial banks, and different institutions that finance housing, automobiles, etc. The important thing is that the debt is with a formal institution and not with friends, relatives, colleagues, or debt acquired in some informal way, or with a 'shark'. Question K.7 inquires, to those who stated owing to institutions and informal networks, to whom do they owe more.

**Question K.8 and K.9 BUSINESS VALUE**

These questions ask about the total value of each reported business. Remember that we only expect approximate answers. We are interested in the respondent’s opinion on the current estimated value of the business, if he/she were to sell it. These are very gross estimations. Write the amount in K.8, in Mexican pesos, if the respondent provides the information. If the respondent doesn’t now or doesn’t provide information in K.8, ask K.9 to get the information by categories.

**Question K.10 BUSINESS TURNOUT**

This question captures if any of the reported businesses yielded any income in the last 12 months, approximately from (date of interview) of 2000 to (date of interview) of 2001, either to the respondent or to his/her spouse. Register YES even though the business didn’t run the whole period, because it is a temporary business, a new one, or it opened at the middle of the period.

**Question K.11 and K.12 GROSS INCOME PER BUSINESS**

These questions refer to the income produced by the business each month. In K.11 we look for the gross income, this is the total amount of sales before subtracting expenses. If the respondent gives the information in a non-monthly period, adjust the information. For instance, if the respondent knows of the year-round sales, and the business worked during the whole year, figure out the monthly number dividing by 12.

Remember that we are interested in gross income, this is, income before discounting expenses. This income is sometimes referred as “all that comes into the cashier."

For retailing, income can come from several sources, ask for the total.

If it is necessary, insist that we only need an approximate number, and will remain confidential. Make the respondent aware that the information gathered will only be used to enlarge our knowledge about the well being or individuals of
middle and old age, and we need to know how many people depend on businesses, and how much of the income comes from that source, nationwide.

If the respondent doesn’t provide the information in K.11, ask question K.12 to find out the amount by categories.

**Question K.13 and K.14 BUSINESS EXPENSES**

These questions refer to the monthly expenses of the business. The goal of this question is to later figure out the profit, which is the net income (sales minus expenses) that the business yields. Write the monthly amount in pesos. Make the necessary operations if the respondent provides the information in a different periodicity. If the respondent doesn’t know or doesn’t provide the information in K.13, ask the rescue question K.14 to find out the number by categories.

For instance, if the respondent says “I spent about 600 pesos,” the interviewer may ask “how often do you spend that amount?” If the respondent answers “twice a year” (this is every six months); then, the calculation is: divide 600 (total expense) by six (months) to get the monthly expense, 100 pesos.

**REAL ESTATE**

Questions K.15 to K.28 about real estate are equivalent to K.1 to K.14 about business. For this purpose, we define real estate as all property that yields income, this is that the respondent profits from it. In other section of the questionnaire (Section J. Housing) we already asked about the properties that don’t yield income to the respondent because he/she lives in them or because he/she uses them for personal or family use. We have room to declare up to two properties.

**Question K.15 REAL ESTATE OWNER**

This question asks if the respondent or his/her spouse owns a property for lease. This serves as filter for the remaining subsection, since if the respondent answers NO, you must jump to question K.29.

**Question K.16 WHO IS THE OWNER**

This question establishes whether the respondent is the sole owner of the property, his/her spouse, or both. This question is useful to determine the access to assets that each spouse has, which can be, in turn, an important indicator of economic security and position within the household, mostly for older women.

**Question K.17 PROPERTY DEBTS**
This question captures if there are debts on the properties; in other words, if they owe something. The goal of this question is to later allow us to deduct the value of the debt to the total value of the asset, and obtain what the real net wealth of the respondent is. We are not interested here to whom they owe, but whether they owe at all or not.

**Question K.18 and K.19 DEBT AMOUNT**

This question refers to the amount owed. Remember that we only expect approximate amounts. Write down the information in pesos if the respondent provides it in K.4. If he/she doesn't know or doesn't answer, ask the rescue question K.5 to get the amount by categories.

**Question K.20 and K.21 WHO DO THEY OWE TO**

These questions inquire to whom do they owe. The goal is to capture, on the one hand, if individuals of middle and old age use credit institutions for their financial needs; and, on the other hand, we are interested in knowing if the family and friends networks help the elderly through supporting them get properties that yield revenue to pay their expenses.

Question K.20 inquires if they owe to relatives, friends or institutions like banks. Consider in the bank options, any formal institution that grants credits in a formal and written manner, like commercial banks, and different institutions that finance housing, automobiles, etc. Question K.21 inquires, to those who stated owing to institutions and informal networks, to whom do they owe more.

**Question K.22 and K.23 PROPERTY VALUE**

This question asks about the total value of each reported property. Remember that we only expect approximate answers. We are interested in the respondent’s opinion on the current estimated value of the property, if he/she were to sell it. These are very gross estimations. Write the amount in K.22, in Mexican pesos, if the respondent provides the information. If the respondent doesn’t know or doesn’t provide information in K.22, ask K.23 to get the information by categories.

**Question K.24 PROPERTY TURNOUT**

This question captures if any of the reported properties yielded any income, either to the respondent or his/her spouse, in the last 12 months, approximately from (date of interview) of 2000 to (date of interview) of 2001. Register YES even if the property didn’t produce any benefit during the whole period, because it was vacant part of the time, or because is a property acquired at the middle of the period.
Question K.25 and K.26 GROSS INCOME PER PROPERTY

These questions refer to the income produced by each property each month. In K.25 we look for the gross income, this is total amount of sales before subtracting expenses. If the respondent provides the information in a non-monthly period, adjust the information. For instance, if the respondent knows of the annual rent, and it was rented the whole year, figure out the monthly number by dividing by 12.

If the respondent doesn’t provide the information in K.25, ask question K.26 to find out the amount by categories.

Question K.27 and K.28 PROPERTY EXPENSES

These questions refer to the monthly expenses of the property. The goal of this question is to later figure out the profit, which is the net income (sales minus expenses) that the property yields. Write the monthly amount in pesos. Make the necessary operations if the respondent provides the information in a different periodicity. If the respondent doesn’t know or doesn’t provide information in K.27, ask the rescue question K.28 to find out the number by categories.

ASSETS

Questions K.29 to K.35 inquire if the respondent and his/her spouse have capital assets like saving accounts, checking accounts, fixed term investments, such as certificates of deposit, etc.; loan owed by others; stocks, bonds, or other forms of participation in a corporation. Capital assets are all those goods with monetary value, but different from previous assets, these goods are not tangible, but rather in monetary form. This form is not necessarily in cash; they may be documents.

The goal of these questions is to know if middle age and older people accumulate assets in this way, and the corresponding amounts, so we can figure out the value of wealth and compare it with the other assets as well.

Notice the format of this subsection. There are three columns corresponding to three types of capital assets. Again, fill out the information by columns, this is, start with the first column, asking all the questions about checking and savings accounts, and fixed term investments. When you finish with K.24 or K.35 continue with the following type of asset in the next column, and so on.

Question K.29 CAPITAL ASSETS OWNERSHIP

This question captures if the respondent (of his/her spouse) has capital assets. This serves as filter for the subsection, since if they declare not having any capital assets, we move to the next subsection to question K.36. We mean by
loan made out to others (K.29b) any type of economic loan without for-profit purposes, they are occasional loans.

**Question K.30 WHO IS THE OWNER**

This question captures if the respondent, his/her spouse, or both are the owners of each type of declared asset.

**Question K.31 and K.32 CAPITAL ASSETS VALUE**

These questions refer to the value of the assets of each column. Remember that we only expect approximate amounts. Write the value in Mexican pesos in K.31. If the respondent doesn’t know or doesn’t provide the information, ask K.32 to find out the information by categories.

**Question K.33 DID THE ASSET YIELD INCOME**

This question captures if each asset produced income during the period of interest.

**Questions K.34 and K.35 CAPITAL ASSETS INCOME**

These questions ask about the amount of income produced by each type of capital asset. Question K.34 asks for the monthly amount. Remember that we only expect approximate amounts. If the respondent provides the information with a different periodicity, figure out the monthly amount. For instance, if the respondent knows the approximate amount of interests obtained through the checking account and investments for the whole year, divide by 12 to figure out the monthly amount. If the respondent doesn’t know or doesn’t provide the information in K.34, then ask K.35 to avoid non-response and find the number by categories.

**OTHER ASSETS**

Questions K.36 to K.42 refer to other assets that the respondent and his/her spouse may own. We mainly ask about vehicles because it is common to own cars, trucks, boats, and others. We also ask about the global value of other assets not mentioned before.

**Question K.36 OWNING VEHICLES**

This question asks if the respondent (or his/her spouse) owns a vehicle or other means of transportation like automobiles, trucks, motorcycles, boats, etc., that have not been reported as part of a business. This works as a filter for the subsequent questions.
Animal traction vehicles, which sole purpose is for people transportation, must be included in this question.

**Questions K.37 to K.39 DEBTS ON VEHICLES**

These questions refer to all debts on the reported vehicles. The goal of this question is to later figure out the net value of these assets. Remember that we only expect approximate values. Question K.37 inquires if there are debts. Question K.38 asks for the total amount of the debts, regardless of the lender. Indicate the amount in Mexican pesos. If the respondent doesn’t know or doesn’t provide information in K.38, ask K.39 to obtain the information by categories.

**Question K.40 and K.41 CURRENT VALUE OF THE VEHICLES**

These questions refer to the total value of each reported property in this subsection. Remember that we only expect approximate values. We are interested in the respondent’s opinion of the value of the property, if it was sold today; this is just an estimate. Write the value in K.40 if the respondent provides one. If he/she doesn’t know or doesn’t provide information, ask rescue question K.41 to obtain it by categories.

**Question K.42 VALUE OF OTHER ASSETS NOT MENTIONED**

This question refers to the approximate global value of all other assets not previously mentioned in the section. The goal of this question is to capture the global value of such assets and also to know how much the value of those assets can help in the case of a medical emergency. For such assets you may consider jewelry, coins, furniture, or animal not part of a business.

**INCOME FROM WORK**

Questions K.43 to K.48 refer to the income earned from the respondent’s work only. Notice the format of this subsection. Columns on the right side correspond to the four types of work income. We ask about the income earned from the main and secondary job of each person. The first two columns refer to the information on wages and salaries, and bonuses, respectively, from the main job. In a similar way, the third and fourth columns refer to wages, salaries, and bonuses from a second job. Fill out the information by columns.

**Question K.43 MAIN JOB DURING PREVIOUS YEAR**

This question works as a filter to determine whether or not you should ask the following questions. Consider “last year” as reference period.

**Question K.44 EARNED INCOME FROM EMPLOYMENT**
This question captures if the respondent earned income from the mentioned job. Write down the monthly income, if they provide you the information in a different period, figure out the monthly income; for instance, if they provide the information on a weekly basis, multiply it by 4.3, and you will obtain the monthly income, this is: 320 weekly > 320 x 4.3 = 1376, then you must write:

0 0 0 1 3 7 6

If the respondent states having earned different amounts throughout the year, ask him/her to indicate the last payment, making sure that this is an income due to wage or salary and nor from a bonus. If necessary, make the conversion to a monthly income.

**Question K.45 BONUS OR PROFIT SHARE ON MAIN JOB**

This question captures the income earned as a bonus or profit share during the last year. These payments are done only once a year. If they indicate having received more than one of these during the year, ask them to provide the amount of each one, and write the total, for example:

- Profit share: 1300
- Employee of the month: 300
- Vacation bonus: 150
- Christmas bonus: 2500

Write

0 0 0 4 2 5 0

**Line A AMOUNT OF INCOME FROM WORK**

These questions refer to the amount of income earned from each type of work. In part A, we inquire about the amount of the payment. Remember we only expect approximate quantities. The periodicity has been set monthly for wages, and annually for bonuses. If the respondent doesn’t know or doesn’t provide the information in A, ask B to find out the amount by categories.

**Questions K.46 to K.48 INCOME FROM SECONDARY JOB**

These questions are equivalent to K.43 to K.45 but refer to the secondary job of the respondent.

**Question K.49 to K.51 SPOUSE’S WORK INCOME**
Questions K.49 to K.51 are equivalent to K.43 to K.45 about income earned from a main job, but they refer to the respondent’s spouse. Follow the instructions given before.

**Questions K.52 to K.54 INCOME FROM SPOUSE’S SECONDARY JOB**

These questions are equivalent to K.46 to K.48 but they refer to the spouse’s secondary job.

**INCOME FROM PENSIONS**

Questions K.55 to K.60 refer to income earned from pension of the respondent only, while K.61 to K.66 refer to the spouse’s pension. Notice the format of this subsection. The columns of the right side correspond to the four types of pensions. We ask about the income earned in each of these types. Fill in the information by columns.

**Question K.55 PENSION INCOME**

This question captures if the respondent received any income from pensions, during the reference period.

**Question K.55a**

**Retirement**: In this option we include pensions derived from a job.

- Retirement or elderly: When turning age 65, as long as they have paid to the institution during 10 years.
- Cesantia: When turning age 60, as long as they have paid to the institution during 10 years.

**Widowhood**: Death of insured-paying-working spouse

**Disability or work accident**: Due to disease or work accident that has partially or totally limited the worker to perform his/her activity, or because accidents occurred during the commute to and from work.

**Other**: Here, we consider pensions derived from any employment, for instance ORPHANAGE granted after the parent’s death, when he/she is insured-paying worker, to minors age 16 who don’t work yet, up to age 25 if they study within the national educational system, or for life if they cannot support themselves permanently (if this last case is the only possible case for the respondents of this survey).
This option will also include the case of ascendant pension, which is granted to the parents when an insured-paying-working child, from whom they depended economically, dies.

Pensions from DISABILITY caused by diseases or non-working related accidents that impede them to perform their activities partially or totally are also included in this question, as long as the institution granting the pension is the one that the worker was paying to at the time of the accident or illness.

If the respondent answers affirmatively to the OTHER option, it is important to ask additional questions to confirm that he/she is properly understanding the option.

**Question K.56 SOURCE OF PENSIONS**

Question K.56 asks for the institution that provides the pension. The options are: IMSS (Spanish acronym for the Mexican Institute for Social Security), ISSSTE (Spanish acronym for Social Security System for Government Workers), another Mexican public institution, like PEMEX (acronym for the Mexican Oil Company), the Secretary of Defense, Navy, Federal Commission for Electricity, Bank of Mexico (Mexican Central Bank); any private institutions, U.S. social security; other institutions, or an individual.

**Question K.57 YEAR IN WHICH PENSION STARTED**

This question asks about the year in which he/she started receiving each reported pension. Remember that we only expect approximate numbers. If the respondent reports the information by giving the age he/she had, figure out the approximate year using the respondent’s current age. For instance, if he/she reports age 60, and the person is 70 today, this means he/she started receiving the pension in 1991.

**Question K.58 and K.59 AMOUNT OF THE PENSION**

These questions capture the amount of each received pension. The questions assume monthly periodicity. If there are doubts, explain that the amount reported in K.58 is after taxes. If the respondent doesn’t know or doesn’t provide the amount in K.58, ask rescue question K.59 to get the information by categories.

**Question K.60 PENSION TO SPOUSE IN CASE OF DEATH**

This question applies only to individuals with spouse, who are currently receiving a pension.
This question captures if the respondent’s spouse will benefit from the pension in case he/she dies. We are trying to capture the degree of protection that the pension offers not only to the respondent, but also to his/her family in the future.

**INCOME FROM SPOUSE’S PENSION**

**Questions K.61 to k.66 INCOME FROM SPOUSE’S PENSION**

Questions K.61 to K.66 about the spouse are equivalent to K.55 to K.60 about the respondent. Follow the same instructions given for those questions.

**FUTURE PENSION**

Question K.67 to K.69 refer to future pensions that the respondent expects to receive in the future. With these questions we capture the degree of protection that the respondent will have in the future.

**Question K.67 EXPECTING A PENSION**

This question asks if the respondent is expecting to receive a pension for retirement in the future. In case of being currently receiving a pension, we ask about another one, besides the current one.

**Question K.68 INSTITUTION GRANTING THE BENEFIT**

This question inquires about the institution that will grant the pension. If the person is expecting to receive more than one pension in the future, write the indicated institutions, up to two.

**Question K.69 EXPECTED AGE WHEN PENSION WILL BE GRANTED**

This question asks about the expected age when the person will start to receive the retirement pension. If there is more than one pension, ask about the date of the first one. If the person gives you the information by the year in which he/she will start receiving the pension, for instance 2005, ask or figure out the age of the person by that year.

**Question K.70 PENSION TO SPOUSE IN CASE OF DEATH**

This question is asked only to people with spouse.

The question captures if the respondent’s spouse would receive any of the pension in case the respondent dies. The idea is to inquire about the protection that the pension gives not only to the respondent, but also to his/her family in the future.
Question K.71 to K.74 SPOUSE EXPECTING PENSION

These questions are equivalent to K.67 to K.70, but they refer to future pensions of the respondent’s spouse.

Question K.75 INCOME FROM GRANTS OR TRANSFERS

This question captures if the respondent or his/her spouse received this kind of income during the previous year, and it refers to donors that are relatives or friends (not children) that don’t live in the household.

INCOME FROM OTHER TRANSFERS

Questions K.76 to K.78 refer to the income that hasn’t been mentioned and that corresponds to income generated by donations and transfers to the respondent only, while K.79 to K.81 refer to income generated by donations and transfers to the spouse.

Notice that the two right columns refer to public transfers (meaning transfers from the government K.76a), or private transfers (from people K.76b). Fill in the information by columns. If in K.76 the respondent doesn’t receive any of these types of income, skip this subsection, pass to K.79 and ask about the spouse (in case there is one).

We ask for the value in cash and in kind and we only expect approximate numbers.

Question K.76 to K.77 OTHER DONATIONS AND TRANSFERS

These questions capture the value of each type of reported donation. Question K.76 asks whether or not they received the donation. Question K.77 inquires about the amount of the most recent donation in a typical month. Remember that we only expect approximate numbers.

Question K.78 DEPENDABLE INCOME

This question captures if the respondent considers he/she will continue receiving the reported income in the future. If the respondent states that he/she will receive it but in a different amount, consider that he/she will receive it.

Question K.79 to K.81 OTHER DONATIONS AND TRANSFERS OF THE SPOUSE

These are equivalent questions to K.76 to K.78, but they refer to the spouse.
OTHER DEBTS

Questions K.82 to K.84 capture if the respondent (or his/her spouse) has other debts that haven’t been mentioned. Examples of others debts are credit cards, medical bills, life insurance loans, loans from relatives, and other.

Question K.82 OTHER DEBTS

This question captures if the respondent (or his/her) spouse has this kind of debts.

Question K.83 and K.84 AMOUNT OF DEBTS

These questions capture the approximate total amount of these debts. Write the amount in Mexican pesos in K.83. If the respondent doesn't know or doesn’t provide you the information, ask the rescue-question K.84 and get the amount by categories.

HOUSEHOLD CONSUMPTION

Questions K.85 and K.86 AMOUNT OF REGULAR MONTHLY CONSUMPTION

Notice that these questions refer to the household, not only to the respondent (or the spouse). This question captures the total amount of expenses of the household. Remember that we only expect an approximate monthly amount, but it has to include all types of expenses, for instance: rent, food, payments, tuitions, clothing, leisure, fees, etc. If the information is not provided, ask rescue question K.86 to obtain the information by categories. If the respondent gives the information with a different periodicity, make the corresponding calculations to figure out the monthly amount.

Question K.87 SELF-CONSUMPTION PRODUCTION

This question refers to what is produced by the household for self-consumption, and therefore is not considered an expense. The goal of this question is to later adjust the value of everything reported as household expense. The question inquires if any member of the household produces something for self-consumption.

FUTURE PLANS FOR THE ASSETS

Questions K.88 to K.90 ask if the respondent has made arrangements to transfer his/her assets upon death, and to whom. These may be delicate questions, so don’t insist if the respondent is hesitant to answer. The information on future plans gives an idea of the planning horizon and preparing level of individuals of
middle and old age in case of death. It also gives us an idea of the degree of vulnerability of the survivors, mostly future widows, since women tend to live longer than man in a couple. Questions about the children who could benefit in the future give us an idea if the plans set for the future in case of death, establish obligations from certain children to provide care, or share the house with the parents. We ask about the help, care, and arrangements in other sections of the questionnaire.

Questions K.88 ARRANGEMENTS FOR THE FUTURE

This question captures whether the respondent has made plans or not. These arrangements may be formal (through a testament for instance) or informal (through conversation with relatives).

Question K.89 and K.90 PERSON WHO WILL BENEFIT

For those who report having made plans to transfer assets upon death, this question inquires in more detail about the people who will benefit. It is worth mentioning that the type of assets that we are referring to may be jewelry, coins, furniture, animals, which are not part of a business, etc. We don’t consider sentimental assets.

Question K.89 establishes if someone (besides the spouse) will get his/her assets. Read the options and write the corresponding answer. If they indicate that both, the spouse and the children will benefit, question K.90 inquires further into whom will benefit more among the children. You must write the code of the children who will benefit most. Look in the rosters to get the number for each child.

Question K.91 RESPONDENT EVALUATION

This question is never asked, it must be answered by the interviewer according to his/her own opinion. Write down if the respondent didn’t need help (NEVER), received little help (FEW TIMES), a lot of help (MOST OR, OR ALL THE TIME); to answer the questionnaire in this section.
5.14 SECTION L. ANTHROPOMETRIC MEASURES

The Central Office of INEGI selected a random sub-sample (about 25%) to participate in this section.

The goal of this section is to obtain reliable measures of weight, height, and equilibrium for sampled respondents. This information assists us in assessing the health of respondents.

The interviewer should wear appropriate clothing to work with the respondent. We also recommend that you ask someone else in the household to assist you. If no one is in the house or available to assist you, please return latter.

Try to standardize the amount of clothing respondents wear. Ask the respondent to wear only one layer of clothes; this is, a dress, blouse and skirt, or pants for the women; and a shirt and pants for men. If it is necessary, ask the respondent to remove outer clothing such as sweaters, jackets, coats, etc.

NOTE: Round up all measures before recording, e.g. if the respondent weighs 67.5 kg., you should record 68. Do this for all measurements before recording.

You have a card on which to record the measurements you will be taking. We suggest that you conduct the measurements in the following order:

a) Weight
b) Height
c) Waist
d) Hip
e) Calf (3 measurements)
f) Knee height
g) Equilibrium

EXAMPLES OF CASES WHERE YOU SHOULD NOT ATTEMPT THIS MODULE

1. Total immobility: In this case, do not attempt any of the measures.
2. The person cannot stand on his/her own (people in a wheelchair, or without a leg). In these cases, measure only knee height and calf circumference.
3. Missing a leg, but uses a prosthesis: In this case, do all the measures with the good leg (write down if the weight was taken including the prosthesis or orthopedic device).

If the respondent uses a cervical collar: attempt to do all measurements. For measuring height, remove the cervical collar, if medically appropriate.
L.1 FILTER: RESPONDENT SELECTION FOR ANTHROPOMETRIC MEASURES

Indicate person was or wasn't selected for measurement.

L.2 FILTER: COUPLE INTERVIEW

Indicate if a single or a couple interview. Follow the instruction in the box of the question.

L.3 WEIGHT:

Use the scale to weight the respondent following these procedures:

1. Place the scale on the floor on a flat surface, preferably without a carpet, avoiding woolen surfaces, uneven floors, or earth floors.
2. Set the scale near a wall at a distance that a person can lean on the wall in case he/she loses his/her balance. When weighting respondents, the person shouldn’t be holding onto anything.
3. Ask the respondent to take off his/her shoes and heavy accessories such as jewelry. Socks are allowed and the respondent should be wearing light clothing.
4. Before the respondent steps on the scale, verify that the dial displays “0”. Ask the person to stand on the scale, facing the screen. The person’s arms must be vertically close to the body, and must stay still without holding on to anything while the weight is recorded. The reading is done when the numbers stop blinking. Record the weight in kilos.

L.4 HEIGHT

The respondent must stand with the feet together, without shoes. The measurement cannot be taken if the person has a spinal deformation.

1. Select a place in the house where the floor is hard, firm, flat and not carpeted. Place yourself lateral to the respondent.
2. The respondent must be looking straight ahead.
3. The tape is extended, placing it on top of the head, without pressing.
4. Read the tape.

L.5 WAIST CIRCUMFERENCE

Be cautious not to apply any pressure when measuring waist circumference.

Avoid physical contact with the respondent. If it is necessary, the respondent can help you hold one end of the metric tape while you go around.
L.6 HIP CIRCUMFERENCE

The interviewer must be on side to the respondent. Place the metric tape at the top of the protruding bone below waist – 3 fingers down, this is, on the top of the hip, and ask the respondent to hold the tape. Walk around the respondent and check that the tape is parallel to the floor. The measurement is done in the most prominent part of the gluteus.

L.7 CALF CIRCUMFERENCE

This measurement must be done without the respondent wearing pants. If the respondent is wearing pants, pull them up, above the calf.

1. Take three measurements in the most prominent part of the calf, and record the highest one.
2. Perform the measure lateral to the respondent and verify that the tape is aligned.

L.8 KNEE HEIGHT

Preferably, take the measure on the right knee. Use the left leg if the respondent uses a prosthesis, platform shoe, or has a cast on the right leg.

1. Person must be seated in a chair. If the chair is too high, place the stadiometer box on a flat surface and ask the respondent to place his/her right foot flat on the box while seated. The idea is to form a 90 degrees angle when bending the knee.
2. The tape must come up over the ankle bone.
3. The upper part of the stadiometer must be on the kneecap (knee bone) at the point where the knee bone sticks out.
4. Take the measure facing the person.

L.9 BALANCE ON ONE FOOT

This exercise must be done while the respondent is wearing comfortable shoes, preferably tennis shoes, low heel shoes, or the kind of shoes that the respondent usually wears at home. We suggest avoiding the use of slippers, since they may be slippery. In cases where a respondent has a weak leg or uses a prosthesis, do the exercise with the healthy leg only.

For some people, the detailed verbal instructions may be boring or unnecessary, therefore it is useful to tell the respondent that the exercise will be explained in detail, since this is the best way to assure that everybody will do it the same.

1. Demonstrate the movement to be performed.
2. Ask if the person feels comfortable doing this exercise. Emphasize that if the person feels the exercise may be dangerous, YOU SHOULD NOT ATTEMPT TO DO IT. Do this without alarming the respondent.
3. Start the exercise on whichever leg the person feels more secure.
4. Ask the companion to locate him/her self behind the respondent (without holding him/her) to minimize the risk of the respondent falling.
5. When the person is ready, say “let’s begin” and from that moment set off the chronometer.
6. Stop the chronometer exactly ten seconds after you set it off, or when the person is no longer able to hold the position by him/herself. Record the number of seconds that the person held the position in the provided space.
7. If the respondent can’t assume the position for measurement, or can’t hold it long enough to start timing it, do not attempt to complete, circling code 95 “tried, but couldn’t do it.”
8. When the chronometer clock shows that 10 seconds have elapsed, stop it and say loudly: “we’re finished.”
9. Repeat with the other leg.

6. PROXY INTERVIEW

What is a proxy?

Proxy is whoever provides us with the information of the selected person or his/her spouse. This is why it is important to find an accurate proxy, for which we recommend to find a direct relative (spouse, child, sibling, parent) or anyone age 15 or older who lives with him/her and you can verify that has the knowledge about the required information of the questionnaire. Examples of this information are: health condition, cognitive status, employment, housing and income; as well as the socio-demographic information of the members of the household.

We have designed a separate interview for proxy cases. This instrument has been adapted, omitting questions of the basic questionnaire, since many questions refer to personal impressions of the respondent that it wouldn’t make sense to have them answered by a third person. The questions are made to be answered by the proxy referring to the selected person. For instance, instead of asking “how many live births have you had?” we ask “how many live birth has (NAME) had?” The interviewer will adapt each question, using the name of the selected person or the spouse (for instance, don Francisco) each time the word (NAME) appears.

It is important to notice that, different to the basic questionnaire, the proxy interview only has room for one interview. This means that for couple interview cases, and only one of the spouses is apt to conduct the interview, one interview must be made in the basic questionnaire (first interview), and the other one in the proxy interview questionnaire. In case of couple interviews, and both spouses
need proxies, then you will use two proxy interview questionnaires. In all of these cases, the interviewer must pay special attention to the codes so they are correctly copied in both questionnaires so we can later link the information of both spouses.

In the case of a couple interview, and one of the interviews must use a proxy, you must conduct the direct interview first and then the proxy one. In the case of couple interview, and both interviews use proxies, we recommend conducting first the interview in which sections TRH, B, G, J and K are answered. This will help to speed up the interviewing process and spend less time in the household.

Only in special cases of temporary absence, the supervisor may approve a proxy interview. However, for health or any other reasons, all proxy interviews are subject to supervision.

**Content of the proxy interview**

The proxy interview has the same thematic content as the basic interview, but with less number of questions. However, there is a section that, due to its nature, is completely different: the cognitive exercises one (Section E).

Instead of section E, we use the proxy-cognitive section that has a series of questions to evaluate the memory and mental deterioration of the person of interest. These questions are based on behavior indicators that the proxy evaluates. The idea is to use the proxy’s personal impression to judge the perceived changes of behavior of the person.

The section contains a battery of questions that have been tried in other countries and cultures, and that were adapted for Mexico. The questions make emphasis on the changes through time that are observed in the behavior and functionality of the person; this is because the loss of mental capacity manifest gradually and may vary widely through different activities and behaviors. Some questions, therefore, may sound repetitive, but the several aspects that we are inquiring about provide the researcher with a different indicator of the severity of the cognitive deterioration of the person of interest.

We consider general aspects like: Memory evaluation, memory comparison, judgments and decisions, and activities organization; as well as particular aspects referring to memory deterioration like: Family memories, recent and past memories, knowledge about addresses, dates, accustomed and unaccustomed places, and learning how to use domestic devices and new things.

To measure mental deterioration, we use questions about understanding, decision-making, economic aspects management, rationing, disorientation, hostility, sleeping disorders, dangerous actions, inexplicable balance and alcohol use.
Ask the questions verbatim and remember that we expect the personal opinion of the proxy. For this reason, the definition of the person’s current condition of the person of interest compared to the past, for instance: “much better” or “somewhat better,” is given by whatever the proxy understands.

7. INFORMATION FOR FUTURE CONTACT

Remember that this is a survey that is planned to be conducted again in 2003, and we will revisit the same people selected for MHAS 2001. For this reason, it is very important not to forget writing down the contact information of someone who may inform us in the future about the selected person, in case he/she no longer lives in the same place. It is recommended that this be a relative or someone close to the selected person, and with whom he/she has frequent contact; this may be a child, grandchild, etc; that doesn’t live in the same house.

If they are hesitant in providing this information, remind them that all the information is confidential.
8. NON-INTERVIEW SHEET

This sheet is used to write down the reasons why it wasn't possible to conduct the interview during the collection and supervision periods. The sheet allows to evaluate the survey activities not only from the fieldwork point of view, but also from the sampling. The sheet has the following parts:

I.- House identification information
II.- Information of the person who classifies and verifies the non-interview
III.- Information used to classify the non-interview

I. House identification information

To fill out this section, you must use again the information on municipality, stratum, AGEB, etc. from the house roster.

II. Information of the person who classifies and verifies the non-interview

In the corresponding space, write your name and number, as well as the date on which you performed the last visit to the house in which you didn’t obtain information.

In the space “Person who provides the information,” write the name of whoever told you about the situation of the house and/or the selected person; this can be a neighbor, relative, maid, etc. In case there is no informant, you must write in the same space a note indicating that the classification was made through observation only.

In the points referring to the final result of the non-interview, period and number of the interview, don’t make any annotations, since the codifier must fill them out.

III. Information used to classify the non-interview

In the space provided for the INTERVIEWER, you must write the cause of the non-interview in the corresponding boxes.

On the back of the non-interview sheet, you must clearly write complementary aspects about the reasons for the non-interview, so the supervisor can have a better idea of the reasons for non-interview.

TYPES OF NON-INTERVIEW

When encountering a non-interview of any kind, you must classify it on the non-interview sheet, you must also inform your supervisor in order for him to do his rescue-information task.
In this survey, there are four types of non-interview.

**TYPE CHARACTERISTICS**

<table>
<thead>
<tr>
<th>A</th>
<th>Occupied house</th>
</tr>
</thead>
<tbody>
<tr>
<td>B</td>
<td>Unoccupied house</td>
</tr>
<tr>
<td>C</td>
<td>House that includes situations of sampling effects</td>
</tr>
<tr>
<td>D</td>
<td>Non-interview classification for specific reasons of the selected person</td>
</tr>
</tbody>
</table>

**TYPE A: Occupied house characteristics**

**A2. “Nobody at time of interview”**

If there is nobody when you first visited the house, come back again doing your best effort to obtain the interview.

Try to find out with neighbors, landlords, and others when and at what time the occupant will be there.

If the number of visits to the house (minimum of five) has been fulfilled, and you haven’t yet found someone, mark on the non-interview sheet “nobody at time of interview.”

**A3. “Temporarily absent”**

It refers to the cases where all the residents of the house are temporarily absent from home (vacations, work, etc.). Ask the neighbors for the reasons and length of the absence. Before ending the collecting week, visit the house again, see if the residents are back, and try to conduct the interview.

**A4. “Refused to provide information”**

This option is used when the selected person refuses to provide information and doesn’t allow others (proxy) to provide it either.

Remember that you must do your best to get the interview.

**A5. “Other (occupied house)”**

In this option you classify other causes that could not be classified in A2, A3, or A4, specifying the reasons. These causes can be, among others: quarantine, inaccessibility, everybody moved out and you couldn’t locate them anywhere else, etc.

**TYPE B Unoccupied house**
B6. “Unoccupied, fit for living”

This category includes the houses with or without furniture that are unoccupied, but fit for living, for sale or rent. The household moved out of the house.

If the house is visited occasionally with the exclusive purpose of cleaning it or taking care of it (maintenance) mark this option. In order not to get confused with option B7, ask additional questions, and make the corresponding comments in the space provided.

B7. “Temporary housing”

These are houses that are fit for living. They usually have furniture, and they are used only temporarily, during weekends or holidays, for leisure or other personal reasons: regardless if they are for rent or for sale.

If the house is visited to be cleaned up with the purpose of living in it occasionally or temporarily, mark this option.

B8. “Unoccupied, inadequate to live in due to bad conditions or remodeling”

You must classify under this category houses that besides being unoccupied, are not considered apt for living, this is, they are in unacceptable structural conditions due either to its damage or other reasons like lack of windows and doors, insecure ceilings and floors, etc.

Classify under this category also, those houses being remodeled or in construction, not ready yet to be fit for living.

B9. “Unoccupied, temporarily used for other ends different than housing”

This happens when the houses are temporarily occupied by businesses, workshops, factories, etc.

To differentiate between temporal and permanent (this will be type C.12), we must consider the time that it will remain as a business or shop. The period to be considered as “temporal” is 3 months or less, after that it is considered “permanent.”

TYPE C Situations of sampling effects

C10. “Demolished”

Write this code for houses that have been destroyed or are in demolition process.
C11. “Tent, trailer, mobile home, etc., changed place”

Write house changed place, for those units that, being registered, selected in the list, and located on the map; have changed location between the time of elaboration of the list and the time the interview was conducted.

C12. “Business or permanent warehouse”

Use this code for those living units that have been permanently transformed or adapted from their normal living use to a commercial one, for business, or to store harvests, machinery, office supplies and other uses.

Consider in this option those houses that are being used during the reference period as churches and praying houses. Be cautious when using this option, because in certain communities, believers would lend part of their houses for praying places and the like. However, they continue to live there. If this is the case, you must conduct the interview.

C13. “Other”

For those living units that cannot be classified in any of the mentioned categories A, B, or C, mark C13 and specify the reason in the space provided.

Some of the cases that can be included in this option are: house closed down, merged house, with the following particularities:

- Places closed down for sanitary or security reasons and with the prohibition of being later occupied, as long as there is a sign on the house. If there is not such legal evidence, report it as something different: unoccupied, etc.
- In the case of merged houses, you must always conduct the interview if the selected person still lives in one part of the house.

**TYPE D Specific reasons of the selected person**

D14. “Selected person (and spouse) moved and cannot be located”

In this option we classify the cases where the selected person (and his/her spouse) changed residence and it is not possible to locate him/her since there isn’t anyone who can provide us with his/her new address, or if they live in another city.

Always write down the new address of the selected person on the back of the non-interview sheet, since if he/she moved within the same locality, or neighborhood, we must look for him at the new address to conduct the interview.
In the case where he/she moved out of the city, write down also the new address, since it will be helpful to us later.

When it is not possible to know the new address, you must specify the reason on the back of the sheet.

**D.15 “Selected (and spouse) not fit for interview and no proxy”**

Use this code when the selected person (and spouse) is not apt to conduct the interview and *we cannot get a proxy*. There are several reasons for not being apt: health, alcoholism, etc.

**D16. “Selected person deceased and no spouse”**

Use this option when the selected person has died and there is no spouse to interview. It may be the case that the spouse also died.

**D17. “Selected deceased and no spouse within required age”**

If the selected person died and his/her spouse is alive but not of age 50 or older, you cannot conduct the interview. This is, we cannot conduct the interview with a widow(er) age 49 or less.

**D18. “Selected (and spouse) temporarily absent and there is no adequate or available proxy”**

Use this option when the selected person (and spouse) are temporarily absent from the house for several reasons (health, vacations, work, etc.) and it is not possible to conduct the interview with a proxy because the co-residents don’t want to or don’t know the information.

The difference between A3 and D18 is that in A3 there is no one in the house at the time of the interview, while in D18 the selected person is not in the house but there is someone there.

When the selected person is temporarily absent, but his/her spouse is present, conduct the first interview with the spouse and conduct the selected person’s interview with a proxy, being this one the second interview.

**D19. “Other”**

Use this option when it is not possible to classify in part D any specific reason for non-interview.