1 The variables in the RAND HRS are constructed from HRS variables, and sometimes combine questions or variables from the HRS. Clear descriptions of how the RAND variables are constructed and reference to the HRS questions from which they originate are provided in the RAND HRS codebook (available online at: http://hrsonline.isr.umich.edu/modules/meta/rand/randhrsj/randhrsj.pdf).

2 Users should be aware that the RAND HRS uses several different values to denote missing data or missing responses (see p. 13 of the document "RAND HRS Data Documentation, Version J" -- available online at http://hrsonline.isr.umich.edu/modules/meta/rand/randhrsj/randhrsj.pdf -- for a more thorough discussion of the treatment of missing data):
. = Reference person did not respond to this wave
.D = Don't know
.R = Refused
.X = Does not apply (specifics depend on variable)
.Q = Data not available because of HRS and AHEAD survey instrument differences in Wave 2 or 3
.U = Reference person is not married (for spouse variables)
.V = Spouse did not respond this wave (for spousal variables)
.S = Information not available due to skip patterns, typically because the interview is by proxy respondent
.M = Other missing

3 The codebook location refers to the section of the RAND HRS codebook in which the construction of the variable is detailed.

4 "With few exceptions, variable names in the RAND HRS Data follow a consistent pattern. The first character indicates whether the variable refers to the reference person ("R"), spouse [or partner] ("S"), or the household ("H"). The second character indicates the wave to which the variable pertains: "1", "2", "3", "4", "5", "6", "7", "8", "9" or "A". The "A" indicates "all," i.e., the variable is not specific to any single wave. An example is RABDATE, the birth date of the respondent. The remaining characters describe the concept that the variable captures" (taken from the document "RAND HRS Data Documentation, Version J," p. 12). The number 1 corresponds with 1992 data, the number 2 with 1993 data (from AHEAD) and 1994 data (from HRS), the number 3 with 1995 data (from AHEAD) and 1996 data (from HRS), the number 4 with 1998 data (note that beginning in this wave and thereafter the HRS and AHEAD surveys were combined), the number 5 with 2000 data, the number 6 with 2002 data, the number 7 with 2004 data, the number 8 with 2006 data, and the number 9 with 2008 data.

5 "HwCPL indicates whether this household is treated as a couple household or not. Households in HRS can consist of a single respondent or a couple. HwCPL is set to one if the respondent is married (RwMSTAT or RwMSTATH is married or partnered), partnered (RwMPART=1), or if there are two respondents in the wave-specific household (HwHHRESP=2). Otherwise a single respondent is assumed, and HwCPL is set to zero. As with most other RAND HRS variables, HwCPL is missing in waves where R does not respond" (taken from the document "RAND HRS Data Documentation, Version J," p. 85).

6 "This variable is created using current marital status reported for each wave. For Wave 3A of AHEAD, and from Wave 4 forward, a cleaned version of marital status is used, which fills missing marital status using cover sheet data and marital events reported between interviews. The codes for separation and divorce are combined in Waves 2A, 3A, and 3H; a separate category is used for this ambiguous state. For all waves, RwMSTAT combines "Married, spouse absent" as one category, rather than separating spouse in institution vs. not. HRS wave 1 imputations are not used at all. From Wave 7 and forward, some cases report a marital status of annulled, which is treated the same as never married. The RwMSTAT variables code partnerships, which override the actual marital status that is available for most cases only from Wave 4 forward. Some cases report an unmarried status but have a partner in the same household, particularly in Wave 2. RwMSTAT retains the reported unmarried status. RwMPART indicates the presence of a partner regardless of the RwMSTAT code. Please see RwMPART description for details" (taken from the document "RAND HRS Data Documentation, Version J," p. 139).

7 "The spouse variable SwMSTAT is taken from the spouse's [or partner's] data for Wave w. It is set to .U if R is unmarried or unpartnered or .V if R's spouse or partner did not respond in a given wave" (taken from the document "RAND HRS Data Documentation, Version J," p. 139).

8 "Marital status RwMSTAT indicates partnership, that is, living with a partner who is not R's spouse. In addition some cases report an unmarried status but have a partner in the same household. Another living individual with the same HHID and sub-household ID on the Tracker file or in the core data indicates the presence of a partner when R gives an unmarried status. From Wave 4 forward, the "coupleness" code in the Cover Sheet section can also indicate a partnership. RwMPART indicates the presence of a partner regardless of the RwMSTAT code" (taken from the document "RAND HRS Data Documentation, Version J," p. 144).

9 "The spouse variable SwMPART is taken from the spouse's [or partner's] data for Wave w. In some cases, the spouse and respondent disagree as to whether they are married or partnered, so RwMPART and SwMPART are not always the same in a given wave. SwMPART is set to .U if R is unmarried and unpartnered or .V if R's spouse or partner did not respond in a given wave" (taken from the document "RAND HRS Data Documentation, Version J," p. 144).

10 "This variable is created using current marital status reported for each wave. For Wave 3A, and from Wave 4 forward, a cleaned version of marital status is used, which fills missing marital status using cover sheet data and marital events reported between interviews.

The RwMSTATH variables are derived from RwMSTAT but do not code partnerships, and actual marital status replaces the partnership code if it can be determined. For instance, because partners were specifically asked actual marital status from Waves 4 forward, many partner marital statuses can be carried back to prior waves if no intervening marital events have occurred. Marital events can also indicate marital status of a partnered respondent, e.g., a number of partners report a widowhood or divorce, followed closely by a marriage to the partner. When the actual marital status cannot be determined RwMSTATH is set to an unknown unmarried status (=9). Marital status for partners can sometimes also be determined at their first interview from retrospective marriage history information. From Wave 7 and forward, some cases report a marital status of annulled, which is treated the same as never married.

The codes for separation and divorce are combined in Waves 2A, 3A, and 3H; a separate category is used for this ambiguous state. Information from previous and subsequent wave marital status, marital events reported, marital history, and spouse marital status are used to distinguish between separation and divorce in these waves when possible. For all waves, this variable combines "Married, spouse absent" as one category, rather than separating spouse in institution vs not. HRS wave 1 imputations are not used at all" (taken from the document "RAND HRS Data Documentation, Version J," p. 148).

11 "RwMSTATH may have a value when RwMSTAT is missing. The analyst may want to fill RwMSTAT from RwMSTATH in these cases" (taken from the document "RAND HRS Data Documentation, Version J," p. 148).

12 "The spouse variable SwMSTATH is taken from the spouse's [or partner's] data for Wave w. It is set to .U if R is unmarried or unpartnered or .V if R's spouse or partner did not respond in a given wave" (taken from the document "RAND HRS Data Documentation, Version J," p. 148).

13 "The RwMSTATF variables compare RwMSTATH with marital status reported in other waves and those derived from marital history. For instance, some cases switch between unmarried statuses across waves, e.g., from divorced to never married. RwMSTATF flags these seemingly illogical differences, distinguishing between ever married and never married discrepancies and those of other types" (taken from the document "RAND HRS Data Documentation, Version J," p. 148).

14 "The RwMSTATF variables compare RwMSTATH with marital status reported in other waves and those derived from marital history. For instance, some cases switch between unmarried statuses across waves, e.g., from divorced to never married. RwMSTATF flags these seemingly illogical differences, distinguishing between ever married and never married discrepancies and those of other types" (taken from the document "RAND HRS Data Documentation, Version J," p. 148). This variable constructs the same information for the respondent's spouse/partner.

15 "Number of marriages is assigned at the first wave R enters the HRS, from the marriage history information, which includes number of marriages including the current one. After the first wave, the number of marriages changes if R reports a marriage beginning between waves, or if a change in marital status indicates that one has begun. If R is married in 2 consecutive waves but to different spouses, a marriage is added for the new spouse. Please note that the maximum number of marriages an individual can report at the first interview varies. If the first interview is Wave 1 there is no maximum; at most 15 marriages are reported. In Wave 2H the maximum is 15. For all other waves the maximum allowed is 4" (taken from the document "RAND HRS Data Documentation, Version J," p. 154).

16 "Spouse's [or partner's] number of marriages is taken from the Wave 'w' spouse's RwMRCT variable. It is set to .U if R is unmarried or unpartnered or .V if R's spouse or partner did not respond in a given wave" (taken from the document "RAND HRS Data Documentation, Version J," p. 154).

17 "RwMNEV indicates if R has never been married. If R reports having an ever-married status but later reports being never-married, he/she remains ever-married, i.e., RwMNEV=0 for the later wave. From wave 7 and forward, some cases report marital status as annulled, which is treated as never married. For ever married respondents, the numbers of divorces, widowhoods, and marriages that ended with unknown status are derived. Please see Number of Marriages (RwMRCT), and other Marital History variables, such as number of divorces (RwMDIV), widowhoods (RwMWID), and ended marriages with unknown status (RwMEND)" (taken from the document "RAND HRS Data Documentation, Version J," p. 158).

18 "Spouse's never married flag is taken from the Wave 'w' spouse's RwMNEV variable. It is set to .U if R is unmarried or unpartnered or .V if R's spouse or partner did not respond in a given wave" (taken from the document "RAND HRS Data Documentation, Version J," p. 158).

19 "RwMDIV counts the number of divorces the respondent has reported. For ever married respondents, the numbers of divorces, widowhoods, and marriages that ended with unknown status are derived. Please see Number of Marriages (RwMRCT), and other Marital History variables, such as the never married flag (RwMNEV), number of widowhoods (RwMWID), and ended marriages with unknown status (RwMEND). The number of divorces derivation begins with the individual's marriage history at the first interview to which he/she responds, counting any divorces reported for past marriages. At subsequent interviews, the divorce count is increased if a divorce is reported as occurring between interviews, or if a respondent's marital status changes from married or separated to divorced. Spouse marital and mortality statuses are used to help fill missing or ambiguous marriage ends. Partners living together are treated as having an unmarried or separated status. A respondent is asked about past marriages only at the first interview. In Wave 1, there are data on 3 past and the current marriage. If the first interview is Wave 2H or 3H, or for the Ahead sample, Wave 3A, there are data on at most 2 marriages. If the first interview is Wave 2A, there is information on at most one marriage. For new interviewees in Waves 4, 5 and from Wave 7 forward, there are data on at most 4 marriages. For new interviewees at Wave 6 there are data on at most 3 marriages. This was corrected in Wave 7. Please note that if a respondent reports that he/she has more than four marriages in most waves, more than two in Waves 2H, 3H, and 3A, or more than one in Wave 2A, how some of those marriages ended will not be known" (taken from the document "RAND HRS Data Documentation, Version J," p. 164).

20 "Spouse's number of divorces is taken from the Wave 'w' spouse's RwMDIV variable. It is set to .U if R is unmarried or unpartnered or .V if R's spouse or partner did not respond in a given wave" (taken from the document "RAND HRS Data Documentation, Version J," p. 164).

21 This variable is a count of the number of times the respondent has been widowed. For a complete description of how this variable is derived, please see p. 171 of the document "RAND HRS Data Documentation, Version J" (Available online at http://hrsonline.isr.umich.edu/modules/meta/rand/randhrsj/randhrsj.pdf).

22 "Spouse's number of times widowed is taken from the Wave 'w' spouse's RwMWID variable. It is set to .U if R is unmarried or unpartnered or .V if R's spouse or partner did not respond in a given wave" (taken from the document "RAND HRS Data Documentation, Version J," p. 171).

23 "RwMCURLN, the length of the current marriage in years, is assigned by looking at marital history dates, marital events, and marriage status. At the first interview, the date the most recent marriage began is asked. This date is kept across interviews until the marriage ends in divorce or widowhood. If R begins a new marriage, the current marriage begin date is reset to reflect this. The spouse's information is examined if available to fill missing current marriage begin dates if they are missing from the retrospective marriage history at a respondent's first interview" (taken from the document "RAND HRS Data Documentation, Version J," p. 184).

24 "Spouse's length of current marriage variable SwMCURLN is taken from the wave 'w' spouse's RwMCURLN variable. It is set to .U if R is unmarried or unpartnered or .V if R's spouse or partner did not respond in a given wave" (taken from the document "RAND HRS Data Documentation, Version J," p. 184).

25 "RwMLEN is assigned by looking at marital histories, marital events, and marriage status. Data are not collected on all marriages: up to four previous marriages if R enters the HRS in waves 1, 4, 5, or 7 forward, up to three previous marriages if R enters the study in wave 6, or up to two previous marriages if R enters in waves 2H or 3. If the first interview is Wave 2A, there is information on at most one previous marriage. If R gives a marriage date or length that indicates being married before age 12, the dates or length are treated as missing, depending on what information is provided" (taken from the document "RAND HRS Data Documentation, Version J," p. 192). For more information on the construction of this variable and limitations in the available data on marriage length, please see pp. 192-193 in the document "RAND HRS Data Documentation, Version J" (available online at http://hrsonline.isr.umich.edu/modules/meta/rand/randhrsj/randhrsj.pdf).

26 "Spouse's length of longest marriage variables SwMLEN and SwMLENM are taken from the wave 'w' spouse's RwMLEN and RwMLENM variables. They is set to .U if R is unmarried or unpartnered or .V if R's spouse or partner did not respond in a given wave" (taken from the document "RAND HRS Data Documentation, Version J," p. 192).

27 "These variables are taken from the Family section. For Waves 1 and 2H, the derivation uses preprocessed variables that assign parent and in-law information to respondents. In Waves 3H, 4, and 5, the derivation uses household-level data, taking into account whether the respondent is the Family Respondent or not. If R is the Family Respondent, then parent data are assigned to the respondent's parent variables and parent-in-law data are assigned to the spouse's parent variables. If R is not the Family Respondent, then parent-in-law data are assigned to the respondent's parent variables and parent data are assigned to the respondent's parent-in-law variables. In Waves 2A and 3A, and from Wave 6 forward, parent data are collected from respondents about their own parents. Information about parents-in-law is assigned from the spouse's report on his/her own parents. If a parent is reported deceased at an interview and parent mortality is missing at a subsequent interview, the death is carried forward. If a parent is reported alive at an interview and the parent's mortality is missing at a prior interview, the living status is carried back. When carrying data forward or back for in-laws, the spouse ids are compared to ensure that the information is for the same parent" (taken from the document "RAND HRS Data Documentation, Version J," p. 208).

28 "RwMOMLIV is assigned R's mother's mortality and SwMOMLIV is assigned R's mother-in-law's mortality. If the parent is alive then the derived mortality status is set to 1, if deceased to 0. If the respondent is unmarried, SwMOMLIV is assigned a .U missing value. In waves where respondents only report on their own parents, SwMOMLIV is assigned a .V missing value when the spouse did not provide an interview" (taken from the document "RAND HRS Data Documentation, Version J," p. 208).

29 "These variables are taken from the Family section. For Waves 1 and 2H, the derivation uses preprocessed variables that assign parent and in-law information to respondents. In Waves 3H, 4, and 5, the derivation uses household-level data, taking into account whether the respondent is the Family Respondent or not. If R is the Family Respondent, then parent data are assigned to the respondent's parent variables and parent-in-law data are assigned to the spouse's parent variables. If R is not the Family Respondent, then parent-in-law data are assigned to the respondent's parent variables and parent data are assigned to the respondent's parent-in-law variables. In Waves 2A and 3A, and from Wave 6 forward, parent data are collected from respondents about their own parents. Information about parents-in-law is assigned from the spouse's report on his/her own parents...If a parent is reported deceased at an interview and parent mortality is missing at a subsequent interview, the death is carried forward. If a parent is reported alive at an interview and the parent's mortality is missing at a prior interview, the living status is carried back. When carrying data forward or back for in-laws, the spouse ids are compared to ensure that the information is for the same parent" (taken from the document "RAND HRS Data Documentation, Version J," p. 211).

30 "RwDADLIV is assigned R's father's mortality and SwDADLIV is assigned R's father-in-law's mortality. If the parent is alive then the derived mortality status is set to 1, if deceased to 0. If the respondent is unmarried, SwDADLIV is assigned a .U missing value. In waves where respondents only report on their own parents, SwDADLIV is assigned a .V missing value when the spouse did not provide an interview" (taken from the document "RAND HRS Data Documentation, Version J," p. 211).

31 "RwMOMAGE is assigned R's mother's current age if living or age at death if deceased and SwMOMAGE is assigned R's mother-in-law's current age or age at death. If the respondent is unmarried, SwMOMAGE is assigned a .U missing value. In waves where respondents only report on their own parents, SwMOMAGE is assigned a .V missing value when the spouse did not provide an interview" (taken from the document "RAND HRS Data Documentation, p. 214). For more detailed descriptions of the construction of these variables and discrepancies between waves, users should consult pp. 213-214 of the document "RAND HRS Data Documentation" (available online at http://hrsonline.isr.umich.edu/modules/meta/rand/randhrsj/randhrsj.pdf).

32 "RwDADAGE is assigned R's father's current age if living or age at death if deceased and SwDADAGE is assigned R's father-in-law's current age or age at death. If the respondent is unmarried, SwDADAGE is assigned a .U missing value. In waves where respondents only report on their own parents, SwDADAGE is assigned a .V missing value when the spouse did not provide an interview" (taken from the document "RAND HRS Data Documentation, p. 218). For more detailed descriptions of the construction of these variables and discrepancies between waves, users should consult pp. 217-218 of the document "RAND HRS Data Documentation" (available online at http://hrsonline.isr.umich.edu/modules/meta/rand/randhrsj/randhrsj.pdf).

33 This is the total number of household residents, including the respondent and his/her spouse/partner. For more detailed information on how this variable is constructed and discrepancies between waves, users should consult pp. 875-876 of the document "RAND HRS Data Documentation" (available online at http://hrsonline.isr.umich.edu/modules/meta/rand/randhrsj/randhrsj.pdf).

34 This is the total number of living children of both the respondent and his/her spouse/partner. "Number of living children is summed, including any who is a child or step-child of the respondent or spouse. Counts of individual children are assigned to the HwCHILD variables. All of the respondent's and spouse's living children are counted for one total" (taken from the document "RAND HRS Data Documentation," p. 878). For more detailed information on how this variable is constructed and discrepancies between waves, users should consult pp. 878-879 of the document "RAND HRS Data Documentation" (available online at http://hrsonline.isr.umich.edu/modules/meta/rand/randhrsj/randhrsj.pdf).

35 "RwLIVPAR and SwLIVPAR provide the numbers of living parents for the respondent and spouse. It is derived by summing the RwMOMLIV and RwDADLIV variables described in "Section A. Demographics, Parent Mortality" of this document. If either RwMOMLIV or RwDADLIV is missing then RwLIVPAR is missing. Mother and father age are also in Section A of this document. In Waves 1, 2, 3H, 4, and 5, the family data on parents are provided from one respondent (Family Respondent). These counts are carried over to the non-Family respondent with the appropriate swapping of relationships. In Waves 2A, 3A, and wave 6 forward, each respondent is asked whether their mother and father are living. In couple households, the spouse's responses are carried over to the respondent to derive SwMOMLIV and SwDADLIV. RwLIVPAR counts a respondent's own living parents and SwLIVPAR counts a respondent's living parents-in-law" (taken from the document "RAND HRS Data Documentation," pp. 887-888).