Social Care for people age 65+: Questionnaire Documentation

Background
The Department of Health and the Nuffield Fundation have funded the development of a module of survey questions concerning receipt of formal and informal care, payment for formal care services and provision of informal care for people aged 65 and over living in the community. The work has been carried out by researchers in the Questionnaire Development and Testing (QDT) Hub at NatCen, along with a group of academics at the Personal Social Services Research Unit (PSSRU) at the London School of Economics (LSE) and University of Kent, and at the Health Economics Group at the University of East Anglia.

Questions asked on previous surveys about receipt and payment for care are now out of date and the complexities of the social care system, in terms of provision and payment for care, means that recipients may not distinguish clearly between who provides their services (e.g. a private company) and who arranges services (e.g. a Local Authority) and who pays for what. Moreover, developments such as Direct Payments and Personal Budgets have not yet been reflected in survey questions and may blur the boundary between paid and unpaid care.

A substantive literature review of relevant economic evaluations, as well as a review of existing questions which identified data needs and gaps, was carried out in 2009. The next stage involved qualitative research with stakeholders, service providers and service users, to help inform the design of the questions which were then subject to expert evaluation and two rounds of cognitive question testing.

The module of questions that has been developed reflects the way the social care system in England and Wales currently operates and covers receipt of care services and related benefits, payment for care services and provision and receipt of informal care. The module can be used in economic evaluations and is suitable for longitudinal or cross-sectional population surveys that cover community-based care. The Health and Social Care Survey (HSCS/HSE) is including a selection of the questions in 2011.

Introduction to the module
This questionnaire contains all the questions proposed for the long version of the module. The module can be shortened by removing some of the questions – either whole sections or individual questions within sections. Questions in red text must be included in the module, even in a short form. Some questions are certainly only recommended for the long module and these are indicated by blue text. All information about the questions which follow is boxed and in black text. To get a feel for the length of the minimum module, read through this document looking at questions in red. The module contains two main sections (A & B), within which there are a number of sub sections. Details of the subsections within A and B are shown on the next page.

Feedback would be welcomed on any inconsistencies of lack of clarity in the documentation. Contact a researcher on the study website: http://www.natcen.ac.uk/social-care-questions-for-over-65s

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1 The colour coding used in this documentation relies on the user being able to print on a colour printer. For the benefit of those who are only able to print on black and white, we have used different font types throughout: questions for the short module (i.e. those in red) are in font Verdana. Those for the long module (those in blue) are in Times New Roman font.
A. Receipt of social care (to be asked to adults aged 65+).
   A1: Help needed and received with ADLs/IADLS²
   A2: Who helps with ADLs/IADLS
   A3: Intensity of care (hours)
   A4: Patterns of care (long module only)
   A5: Payments for care
   A6: Meal provision, lunch clubs and day care attendance
   A7: Aids and equipment (long module only)

B. Provision of care (to be asked to adults aged 16+: designed to focus on care provided to people aged 65+ but can be adapted)
   B1: Help provided in the last month and who helps
   B2: Intensity of care (hours)
   B3: Details of what help is given, payments received and support
   B4: Effects of caring

Presentation of the Questions
The questionnaire is designed to be used in Computer Assister Personal Interviewing (CAPI). The presentation of the CAPI questionnaire follows a consistent structure which is shown by the following example.

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{IF Helpinf=10 (Neighbour)}
GenNbour
INTERVIEWER CODE IF OBVIOUS FROM PREVIOUS QUESTION OR ASK
And is [answer from NmNbour] male or female?
1. Male
2. Female
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The first line ‘{IF ‘Neighbour’ AT Helpinf}’ is a brief description of the routing for the question ‘GenNbour’. This piece of information shows who should be asked the question. Occasionally the text in italics will read ‘{ASK ALL}’, otherwise there will be an instruction which states that only certain respondents should be asked the question (in this example, only those who are helped by a Neighbour). Where the question should only be asked to certain respondents, there will first be a reference to the variable name (Helpinf) and to the code which (10). Where there is no comment before the variable name, the routing is the same as the preceding question(s).

Text Fills
Where a piece of text appears in italics within square brackets [ ] in a question, for example [name of helper], this indicates that a textfill has been used. A textfill is a text insert that is based on information given in a previous question. To keep this questionnaire documentation relatively simple and easy to read, unless the text fills are straightforward (and where they are we state them at each question) we have chosen not to include text fills at each question. Instead, in appendix B, there is a list of the more complicated text fills for those questions which rely on them.

Text that appears in boxes relates to the question, or set of questions, which come after the box and includes routing instructions, rules, clarifications and other contextual information about the questions which follow.

Mode of administration
The module has been designed for use in Computer Assisted Personal Interviewing (CAPI). Aside from the fact that these questions have not been designed with any other mode in

² Activities of Daily Living (ADLs), Instrumental Activities of Daily Living (IADLs)
mind, the heavy and complex routing means we would advise against administering these questions in a paper self completion format. Similarly, due to the number of showcards, lengthy nature of some of the questions and interviewer text and instructions, we would also advise against telephone interviewing (CATI).

Because this module has been designed for older people, it is worth noting that interviewers often have to provide respondents with assistance and will read out showcards to those who are unable to read because of problems with vision. In such circumstances, this will undoubtedly add length to the interview time but we accept that this happens in practice and would therefore advise that interviewers are briefed to ensure that all respondents are exposed to the same stimuli, as far as is possible. For all questions don’t know and refusal are permissible answers, but this is not shown on this spec.

Surveying respondents in institutions
Much care and thought would need to be taken if these questions are asked to people living in institutions such as residential care homes. There are many issues which would need addressing and we are not able to guarantee that these questions will translate for people in care homes. For example, it would be inappropriate to ask the questions about receipt of formal care services (section A2) and payments for these (section A5). Likewise the questions about provision of care are probably best avoided for someone living in a care home (and therefore with a high level of need) as it is unlikely that they would be providing help and support to someone else.

Dependent interviewing in longitudinal panel surveys
The questions have been designed for cross sectional surveys, but they can be adapted for use on longitudinal (panel) surveys. In panel surveys people are interviewed each year, or at timely intervals, and often dependent interviewing is used, whereby it is possible to feed forward substantive answers from previous interviews, which can be used to improve data quality (Brown, Hale and Michaud, 1998). If a decision is made to ask the questions in this module in this form (i.e. ‘Last time you told us that you had received help in the last month with bathing and showing, is this still the case?’), we would advise that some preliminary testing and/or piloting was carried out first to establish whether it would work. It is also worth noting that most of the questionnaire rests on section A1 (help needed and received with ADLs/IADLs) and as the reference period used is the ‘last month’, we suspect that the questions will capture people who are in temporary or transitional circumstances (receiving help because of a fall or having come out of hospital) as well as people with more permanent and stable circumstances (i.e. those who have a care package which hasn’t changed since the need for help was identified). Therefore dependent interviewing may not be as appropriate for these questions as it is for the collection of other data (such as relationships/income/housing).

Additional questions not covered in this module
To make sense of the data collected in this module, it is also advisable that certain benefit questions are asked on the same survey. It may be that the survey already has its own set of benefit questions. There are two main disability benefits that older people can receive:

1. Attendance Allowance (claimed only by people aged 65+); and,
2. Disability Living Allowance (can be received by people of any age but has to be first claimed before reaching the age of 65). This benefit has two components: for care needs and for mobility. Recipients can receive one or both of these components.

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No-one should receive both Attendance Allowance and Disability Living Allowance. Ideally, the benefits questions which are asked alongside the care module include Attendance Allowance and both components of the Disability Living Allowance.

We would also strongly advise that a mobility question is asked alongside the questions about receipt and provision of care. It is essential to have this information when making sense of the care people receive and provide. We have included a question (Mobility) which collects the required information needed for analysis; however we recognise that most health surveys will collect this in their own way.

It is also assumed that demographic questions such as age, gender, socio-economic status would also be collected in any survey using this module.

**Concurrent interviewing**

In some surveys in which more than one person from the same household is interviewed, such as the Health Survey for England, concurrent interviewing is carried out. For this module HSE has split the short version of the module into several sub-sections. For each sub-section each respondent would be asked all the questions, then they would be asked to the second respondent. Once all respondents in a concurrent interview have completed one section the interviewer will move onto the next section. The subsections identified in HSE for splitting up the concurrent interview are as follows:

- A1: Help needed and received with ADLs/IADLs
- A2: Who helps with ADLs/IADLs$^4$ and A3: Intensity of care (hours)
- A5: Payments for care
- A6: Meal provision, lunch clubs and day care attendance
- B1: Help provided in the last month and who help and B2: Intensity of care (hours)
- B4: Effects of caring

**Interviewing by Proxy**

This module has not been designed to be asked of proxy informants (i.e. a person who could answer the interview on behalf of the eligible respondent) however we recognise that some surveys will allow for proxies. In such circumstances, the proxy informant would need to know enough about the respondent’s care needs and circumstances to be able to provide the information about them. Where possible close family members, such as a partner or son or daughter, could fulfil this role but it may also be possible for care staff to answer the questions on the respondent’s behalf (especially if the person is employed as a personal assistant for example).

In the payments section there is provision for the respondent to receive assistance from a more knowledgeable person in answering the questions and there is a variable (Whoans) to record this.

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$^4$ Activities of Daily Living (ADLs), Instrumental Activities of Daily Living (IADLs)
Changes made to the questionnaire since the two rounds of cognitive testing

This questionnaire has been tested using two rounds of cognitive interviewing. Changes were made after the first round and a new version tested in a second round of interviewing. The findings of both rounds of cognitive testing and resulting recommendations have been written up into a report. In this section we summarise some of the main changes which have been made since then and which were not recommended in the report. It is not possible to outline all changes as some are very minor. These changes have resulted from:

- Discussion with possible users of the module (HSE and ELSA)
- Expert panels with academic collaborators and representatives of HSE and ELSA
- Two rounds of piloting on HSE

Some of the main changes include:

- Changing the list of ADLs and IADLs which are asked about. The final list has resulted from a compromise based on:
  - A continued commitment to the Katz and Barthel indices
  - Needing to reduce the number of tasks
  - Needing to cover different dimensions of need for help
  - Needing to fit in with the requirements of surveys likely to use the module
  - Needing to reflect what the collaborators have identified in previous research as important
- Reverting to a version of the ADL and IADL section first tested in round 1 of the cognitive testing which asks about need for all tasks and then about whether help is received for all tasks (rather than asking about need and receipt for each task in turn). This is because most respondents will not need or receive any help and this should speed up the administration of the questions for this group.
- Grouping the tasks in order to ask about who helps to reduce the length of the questionnaire, but having a grouping which makes sense to respondents and analysts
- Changing the way in which individual personal assistants or home care workers are identified in order to ask follow-up questions. This was identified in the cognitive report but the solution proposed there did not work and so a new approach was suggested (HHelp/2/3)
- Further clarification about what should and should not be included in the hours of help given (e.g. to cater for live-in personal assistants).
- Changes to the way direct payments and personal budgets are asked about in the payments section based on further understanding of how they work in practice, discussion with HSE researchers and the requirements of the HSE client, as well as further testing of the module in the context of HSE.
- Changes to the priorities by which providers are covered in the payments section where respondents use more than one provider.

Citing the questionnaire module

Researchers wishing to use this questionnaire are asked to cite it as: ‘Blake, M., Gray, M., Balarajan, M., Darton, R., Hancock, R. Henderson, C., King, D., Malley, J., Pickard, L., Wittenberg, R (2010) ‘Social Care for older people aged 65+, questionnaire documentation’. Extra information is that it was funded by the Nuffield Foundation and developed at NatCen, PSSRU at LSE and the University of Kent, and the University of East Anglia.

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5 Meera Balarajan, Michelle Gray, Margaret Blake and Sophie Green, Robin Darton; José-Luis Fernandez; Ruth Hancock; Gite Henderson; Dan Kearnns; Derek King; Juliette Malley; Adam Martin; Marcello Morciano; Linda Pickard; Ian Shemilt; and Raphael Wittenberg (November 2009) Cognitive testing of social care questions for people aged 65 and over. Research funded by the Nuffield Foundation (OPD/3609) and the Department of Health

6 Health Survey for England/ Health and Social Care Survey
Figure 1: Structure of the whole module

A: Receipt of care
A1: Help needed and received with ADLs/IADLs
If NO help received in last month
If had help with any last month
A2: Who helps with grouped ADLs/IADLs
List of informal providers
List of formal providers
Whether live in Same hhld & Name
A3: No of hours helped in last week
For two most intense providers
A4: Patterns of care (Long module only)
For up to two providers /groups
A5: Payments for care

B: Provision of care
B1: Whether helped anyone because of health/old age in last month
If NO help received in last month
B2: No of hours Helped in last week
B3: Which ADLs/IADLs helps with, receipt of any money. Whether person cared for receives support and whether R receives support
B4: Effects of Caring and whether had carers assessment
B7: Aids and equipment (Long module only)
No of people aged 65+ helped
For up to three
Name, relationship to R & same/different hhld, Age and Gender

Total time caring For all aged 65+
For two most intensely helped

No of people aged 65+ helped
END
Figure 2: Structure of Payments for care (Section A5)

Whether R has direct payments or council managed money

Whether R has Personal Budget

Whether had an income assessment

If no formal provider

For each formal provider

Whether pays provider

ROUTE A

Whether care was arranged through LA

LA not involved

ROUTE B

Amount pays

Whether pays all or some

Whether pays from Own money or from Direct payments or Personal Budget

Whether pays all or some

Whether LA, family, other contributes

If no-one else pays and R doesn't pay

Why no payment made

END

Amount Paid from DP/PB

If LA pays

How LA pays

Whether pays from Own money or from Direct payments or Personal Budget

Whether LA, family, other contributes

If LA pays

Why no payment made

END

Amount Paid from DP/PB

If no-one else pays & R doesn't pay

Why no payment made

END

Whether Pays for any providers

If doesn't pay

Whether LA, family, other contributes

If LA pays

How LA pays

If no-one else pays & R doesn't pay

Why no payment made

END

Amount Paid from DP/PB

If LA pays

How LA pays

If LA pays

How LA pays

If LA pays

How LA pays
A: RECEIPT OF CARE

A1 – HELP NEEDED (Tasks) AND HELP RECEIVED (Taskhelp) WITH ADLs & IADLs (ASKED TO ALL AGED 65+)

ASK ALL AGE 65+

Intro
INTERVIEWER READ...
The next few questions are about tasks that some people may need help with and about help that you may have received in the last month. Please think only about help you need because of long-term physical or mental ill-health, disability or problems relating to old age.
For each task, I’d like you to tell me which option applies to you.

Tasks is asked for each ADL/IADL in turn, before moving onto TaskHelp for each ADL and IADL in turn. TaskHelp is asked for all ADLs/IADLs regardless of the answer to Tasks. After the first time a shorter wording can be used for each question but with full question also shown in screen in brackets.

SHOWCARD A

Tasks
Thinking about [ADL/IADL], please look at this card and tell me the option which best applies to you?

1. I can do this without help from anyone
2. I have difficulty but manage on my own
3. I can only do this with help from someone
4. I cannot do this

INTERVIEWER: Do not include help from special aids or equipment such as wheelchairs or stair lifts. (THIS TEXT SHOULD BE SHOWN EVERY TIME. IF THAT IS NOT POSSIBLE IT SHOULD CERTAINLY BE SHOWN FOR TASKS 1 AND 9)
To include for last three tasks only (11-13): INTERVIEWER: Do not include help that has always been received because of the way household responsibilities are divided.

Subsequent times Tasks is asked use:
Still looking at Showcard A, what about [ADL/IADL]?
(Thinking about [ADL/IADL], please look at this card and tell me the option which best applies to you?)

ASK ALL AGE 65+

Intro
I’d like to ask you about any help you have received in the last month, even if you don’t usually need any help. Please think only about help you have received because of long-term physical or mental ill-health, disability or problems relating to old age.

TaskHelp
Have you received help from anyone with [ADL/IADL] in the last month?
INTERVIEWER: Include help even if it was for a short time or provided by husband/ wife/ another family member

1. Yes
2. No

Subsequent times TaskHelp is asked use:
What about [ADL/IADL]?
(Have you received help from anyone with [ADL/IADL] in the last month? INTERVIEWER: Include help even if it was for a short time or provided by husband/wife/another family member)

ADLs and IADLs
1. getting in and out of bed on your own
2. washing your face and hands
3. having a bath or a shower, including getting in and out of the bath or shower INTERVIEWER: IF RESPONDENT SAYS THEY CAN DO ONE BUT NOT THE OTHER, ASK THEM TO THINK ABOUT THE WASHING FACILITIES THEY HAVE.
4. dressing or undressing, including putting on shoes and socks
5. using the toilet
6. eating, including cutting up food
7. taking the right amount of medicine at the right times. INTERVIEWER: Include prescribed medicines and medicines you can buy over the counter
8. getting around indoors
9. getting up and down stairs
10. getting out of the house, for example to go to the doctors or to visit a friend
11. shopping for food including getting to the shops, choosing the items, carrying the items home and then unpacking and putting the items away
12. doing routine housework or laundry
13. doing paperwork or paying bills

If respondent answers ‘No’ to all parts of TaskHelp, they will be taken straight to A6 (MealProv)

BladProb and BowProb MUST BE INCLUDED AS THEY ARE NEEDED TO FEED INTO INDICES. THEY CAN BE ASKED AFTER ASKING ABOUT RECEIPT OF HELP WITH USING THE TOILET, AND BEFORE HELP WITH EATING, OR CAN BE ASKED IN A SELF-COMPLETION FORM.

{ASK ALL AGE 65+}

BladProb
SHOWCARD B
Do you suffer from problems with your bladder? This could be things like accidentally having wet pants, leaking urine, needing to go to the toilet frequently or urgently, sometimes not making it to the toilet in time, or using aids or appliances to manage bladder problems or incontinence. Please include problems with your bladder caused by any medicines that you take.
1. Yes
2. No

{ASK ALL AGE 65+}

BowProb
SHOWCARD C
Do you suffer from problems with controlling your bowels? This could be things like accidentally having soiled pants, leakage from the bowel, needing to go to the toilet frequently or urgently, sometimes not making it to the toilet in time, or using aids or appliances to manage bowel problems or incontinence. Please include problems with your bowel caused by any medicines that you take.
1. Yes
2. No
{IF TaskHelp=YES only for ‘shopping for food’, doing paperwork or paying bills, or ‘housework or laundry’ or a combination of these (i.e. no help received with any other ADLs/IADLs)}

CHECK A
Do you receive this help with [shopping for food/ housework and laundry /doing paperwork or paying bills] because of long standing physical or mental ill-health, disability or problems relating to old age?
1. Yes for some or all
2. No, none of this help is because long standing physical or mental ill-health, disability or problems relating to old age → GO A5 (MealProv).
A2 – WHO HELPS WITH ADL/IADLS

LONG VERSION: ASK Helpinf AND Helpform FOR EACH ADL/IADL RECORDED AT TaskHelp (USED IN THE LAST MONTH) on a loop but with some ALDs/IADLs combined:
1. Having a bath or shower
2. Getting in and out of bed /washing your face and hands /dressing or undressing / eating/ taking the right amount of medicine at the right times
3. Getting around indoors/ getting up and down stairs
4. Using the toilet
5. Getting out of the house /shopping for food / doing routine housework or laundry /doing paperwork or paying bills

SHORT VERSION: ASK Helpinf AND Helpform x3 times, For:
1. Having a bath or shower
2. Getting in and out of bed /washing your face and hands /dressing or undressing/ using the toilet/ eating, including cutting up food/ taking the right amount of medicine at the right times/ getting around indoors/ getting up and down stairs/
3. Getting out of the house / Shopping for food / Doing routine housework or laundry/ doing paperwork or paying bills

For the text fills at Helpinf and Helpform, only those recorded at TaskHelp should be read out (in the grouped lists above). So in the short version, for example, if a respondent received help in the last month with having a bath or shower (group 1) and getting out of the house and doing routine housework or laundry (group 3), Helpinf should be asked inserting [having a bath or shower] and then Helpform should be asked inserting [having a bath or shower]. Then Helpinf should be asked inserting [getting out of the house and doing routine housework or laundry] and finally Helpform should be asked inserting [getting out of the house and doing routine housework or laundry]. A total of four questions for this example.

{ASK THOSE WHO RECEIVE HELP WITH ANY TASK AT TASKHELP UNLESS CHECKA=NO}  

Intro
Now I am going to ask you about who helps you with different things. I will show you two lists of people who may have helped you.

SHOWCARD E
Helpinf

In the last month, who has helped you with [ADL/IADL(s) from grouped list].
First, please tell me about all of the people from this list who have helped you?
IF NECESSARY (especially for getting out of the house, shopping for food, housework and laundry and paperwork and paying bills): Please only think about help received because of long-term physical or mental ill-health, disability or problems relating to old age.
CODE ALL THAT APPLY:
1. Husband/Wife/Partner
2. Son (including step son, adopted son or son in law)
3. Daughter (including step daughter, adopted daughter or daughter in law)
4. Grandchild (including Great Grandchildren)
5. Brother / Sister (including step / adopted / in-laws)
6. Niece / Nephew
7. Mother/father (including mother-in-law/ father-in-law)
8. Other family member
9. Friend
10. Neighbour
11. None of the above
SHOWCARD F

Helpform
Now, please tell me about all of the people from this list who have helped you with [ADL/IADL(s) from grouped list] in the last month?
CODE ALL THAT APPLY:

1. Home care worker /Home help/Personal Assistant
2. A member of the reablement / intermediate care staff team
3. Occupational Therapist / Physiotherapist
4. Voluntary helper
5. Warden / Sheltered housing manager
6. Cleaner
7. Council’s handyman
8. Other (please specify)
9. None of the above

{If Helpform=8 (Other)}

WhoHelp
Who has helped you?
OPEN RESPONSE:

In surveys with a household grid, HelpFam can be linked to this. If the survey does not contain a household grid, or the person who helps is not in household, name will need to be collected at NameFam.

{For all identified at HelpInf, except Neighbour}

HelpFam
You’ve told me that your [answer from HelpInf] helped you. Can I just check, does he/she live here with you?
1. Yes → CODE HHLD GRID NUMBER (in which case we know the name) OR IF NO HHLD GRID, ASK NameFam
2. No → NameFam

{If HelpFam=2 (No) or IF there is no household grid}

NameFam
What is your [answer from HelpInf]’s name?
INTERVIEWER CODE WHETHER ANY MORE [answer from HelpInf]’S HELP, IF SO REPEAT HELPFAM/NAMEFAM FOR EACH (UP TO 3 IN TOTAL).

{If HelpFam=2 or IF no household grid and HelpInf=4,5,6,7,8 or, 9}

GenFam
INTERVIEWER CODE IF OBVIOUS FROM PREVIOUS QUESTION OR ASK
And is your [answer from HelpInf] male or female?
1. Male
2. Female
INTERVIEWER CODE WHETHER ANY MORE [ANSWER FROM HELPINF] HELP, IF SO REPEAT HELPFAM/NAMEFAM/GENFAM FOR EACH (UP TO 3 IN TOTAL).
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{IF 'Neighbour' AT Helpinf}
NmNbour
What is your neighbour’s name?
INTERVIEWER CODE WHETHER ANY MORE NEIGHBOURS HELP, IF SO REPEAT NMNBOUR FOR EACH. (UP TO 3)

{IF Helpinf=10 ('Neighbour')}
GenNbour
INTERVIEWER CODE IF OBVIOUS FROM PREVIOUS QUESTION OR ASK:
And is [answer from NmNbour] male or female?
  1. Male
  2. Female

{IF Helpform=1}
Hhelp
You have told me that a home care worker/home help/personal assistant helped you in the last month. Do you have just one person helping you, or do you have more than one?
  1. One
  2. More than one

{IF Hhelp=2 (More than one)}
Hhelp2
Do they all help with the same kinds of things, or do you have different people helping with different things?
  1. All help with same kind of things
  2. Different people help with different things

{IF Hhelp=2 (Different people help with different things)}
Hhelp3
I’d like you to think about the home care helpers, home helps or personal assistants who help with different things, so that I can ask you about each type of thing later on. So what sort of things does the [first/second/third] person help you with?
CODE FOR FIRST HELPER/GROUP OF HELPERS HERE
  1. Getting up in the morning
  2. Going to bed
  3. Washing/ bathing/personal care
  4. Meals/ eating
  5. Getting out of the house/ shopping
  6. Cleaning/ laundry
  7. Other

Referring to carers and helpers throughout the rest of the module:
- Informal carers will be referred to by name which has been collected at ‘NameFam’, ‘NmNBour’ or which will be derived from household grid.
- Homecare workers will be referred to by the task they do if there is more than one of them. If only one, or if more than one but they all help with the same kinds of things, then they will be referred to as ‘home care worker or personal assistant’ – interviewer can short cut to whichever term respondent prefers.
- FOR ALL OTHERS IDENTIFIED AT Helpform – i.e. formal carers - we suggest we text fill their job rather than collect names, so text fill would be [your voluntary helper/cleaner].

7 In HSE this is a single code question
A3 - HOURS OF CARE (INTENSITY)

Long module only or in short modules for longitudinal surveys such as ELSA where respondents used to this type of request for response aid.

Doccon
I’m going to ask you about the amount of care you receive. You may find it helpful to refer to a calendar, care plan, invoice or bill. Do you have a calendar, care plan, invoice, bill, or any other relevant document that you could consult?
CODE ALL THAT APPLY
1. Yes – calendar
2. Yes – care plan
3. Yes – invoice or bill from local authority
4. Yes – invoice or bill from provider
5. Yes – other
6. No – respondent does not have any such documents
7. No – respondent not willing to consult any documents

We are proposing that interviewers screen’s in CAPI have the equivalent hours per day for answer options 5 – 9 to aid them in converting respondents' answers.

FOR FORMAL PROVIDERS IDENTIFIED AT Helpform ALLOW A PRECISE ANSWER (because likely to be linked to payment amounts which are not asked in SHORT):
[ASK FOR EVERYONE IDENTIFIED AT HelpForm]

HrsForm
Thinking about [person who helps], in the last week how many hours have they helped you in person with these kinds of tasks?

INTERVIEWER EXPLAIN IF NECESSARY: not help over the phone or by internet
IF 2 PEOPLE HELP AT THE SAME TIME, CODE DOUBLE THE HOURS
ENTER NUMBER OF HOURS AND MINUTES.
IF RESPONDENT DOES NOT GIVE PRECISE ANSWER INTERVIEWER CODE DK
SHORT MODULE: ASK FOR EVERYONE IDENTIFIED AT HelpInf and at HelpForm
LONG MODULE: ASK FOR EVERYONE IDENTIFIED AT HelpInf and if HrsForm=DK/REF FOR HELPERS FROM HelpForm
SHOWCARD G

**HelpHours**

Thinking about [person who helps], in the last week how many hours have they helped you in person with these kinds of tasks?

INCLUDE FOR INFORMAL PROVIDERS (Only show for those from HelpInf): Please only think about the hours they were helping you with these kinds of tasks and not about the time they were around in the house or there to help you if you needed it

INTERVIEWER EXPLAIN IF NECESSARY: not help over the phone or by internet or doing occasional errands or odd jobs without the respondent

INTERVIEWER NOTE: ROUND DOWN IF NECESSARY, e.g. IF 4.5 HOURS, CODE ‘1-4 hours’

IF 2 PEOPLE HELP AT THE SAME TIME, CODE DOUBLE THE HOURS

INTERVIEWER INSTRUCTION (only to be shown if Helpform=1): If home care worker / personal assistant / other care staff ‘lives in’ / ‘sleeps in’, INCLUDE ALL hours they are on duty.

1. No help in the last week
2. Less than one hour
3. 1-4 hours
4. 5-9 hours
5. 10-19 hours
6. 20-34 hours
7. 35-49 hours
8. 50-99 hours
9. 100 hours or more

{If HelpHours = don’t know or refusal}

**HelpHoursB**

Can you tell me whether in the last week [person who helps] helped you in person with these tasks for:.....READ OUT....

1. Less than 20 hours
2. 20-34 hours
3. Or for 35 hours or more?

**WhPROV – NOT A QUESTION – A DERIVED VARIABLE INSIDE BLAISE**

CAPI TO SELECT THE TWO PROVIDERS WHO GAVE THE MOST HOURS OF CARE IN THE LAST WEEK AT HrsForm, HelpHours or HelpHoursB. Where the second and third provider gave equal hours priority would be given to:

- formal provider if one formal and one informal
- a co-resident provider if both informal
- provider closer to top of list at Helpform if both formal
- provider helping with personal tasks (HHelp3) tasks if both formal and same type of provider
- first home care worker mentioned by respondent at Hhelp3 if two home care workers and both help with personal tasks.
A4 - PATTERNS OF CARE (LONG MODULE ONLY)

[ASKED OF UP TO TWO PROVIDERS IDENTIFIED AT WhProv or at HelpInf/Helpform if only one provider]

[If any help received last week: HelpHours > 1]
SHOWCARD I

LastWk
Still thinking only about help received in person, how often did [person who helps] help you last week?

INTERVIEWER EXPLAIN IF NECESSARY: not help over the phone or by internet
1. Every day
2. Four to six times
3. Two or three times
4. Once

[If no help received last week: HelpHours = none)]
SHOWCARD X

OftHelp
Still thinking only about help received in person, how often does [person who helps] usually help you?

INTERVIEWER EXPLAIN IF NECESSARY: not help over the phone or by internet
1. Two or more times a week
2. Once a week
3. Once a fortnight/ every two weeks
4. Once a month
5. Less than once a month

[If LastWk = 1, 2 OR 3 and provider is from HelpForm]
SHOWCARD IX

TimeDay
On the days [person who helps] helped you, how many times a day did he/she help you last week? IF VARIED FROM DAY TO DAY ASK RESPONDENT TO ANSWER FOR THE MOST COMMON PATTERN.
1. Once a day
2. Twice a day
3. Three or four times a day
4. All the time
5. Whenever I needed it?

[ASKED OF UP TO TWO PROVIDERS IDENTIFIED AT WhProv or at HelpInf/HelpForm if only one provider and only if help received in last week – HelpHours not equal none]
SHOWCARD J

DayNight
Still thinking about help received in person, when did [person who helps] help you last week?

INTERVIEWER EXPLAIN IF NECESSARY: not help over the phone or by internet
1. During the day time only, until you go to bed
2. During the night time only, once you have gone to bed
3. Or both during the day time and at night after you have gone to bed
WeekEnd
Last week, did [person who helps] help you….READ OUT…
1. on week days only
2. over the weekend only
3. or on weekdays and over the weekend?
A5 - PAYMENT FOR CARE

THERE ARE TWO ROUTES THROUGH THE PAYMENTS SECTION:

• ROUTE A: FORMAL PROVIDERS ARRANGED THROUGH LOCAL AUTHORITY
• ROUTE B: FORMAL PROVIDERS NOT ARRANGED THROUGH THE LOCAL AUTHORITY AND INFORMAL PROVIDERS WHO PROVIDED 20 OR MORE HOURS OF CARE IN THE LAST WEEK (HelpHours=6, 7, 8 or 9 / HelpHoursB=2 or 3)

WE WOULD ENCOURAGE WHO DEAL & FIN HELP, WHICH ENABLE THE RESPONDENT TO GET HELP WITH QUESTIONS ABOUT PAYMENTS FOR CARE, TO BE INCLUDED EVERY TIME PAYMENTS SECTION IS USED BECAUSE SOME RESPONDENTS MAY NOT KNOW THE DETAILS ABOUT THE PAYMENT FOR THEIR CARE. THIS APPROACH WOULD NEED TO FIT IN WITH THAT PARTICULAR SURVEY'S PROTOCOLS IN RELATION TO PROXIES, CONCURRENT INTERVIEWS AND THE USE OF RECORDS.

Intro questions before routes start

(ASK ALL WHO USE A FORMAL PROVIDER (HelpForm) OR WHO USE AN INFORMAL PROVIDER FOR 20 OR MORE HOURS A WEEK (HrsForm=6, 7, 8 or 9 OR HelpHours=6, 7, 8 or 9 OR HelpHoursB=2 or 3)

{ASK ALL OVER 65}

Intro

INTERVIEWER READ OUT: Now I am going to ask you a few questions about paying for the care you receive.

Whodeal

Do you usually deal with paying for your care or does a family member or friend manage this for you? INTERVIEWER CODE RESPONDENT ANSWER:

1. Respondent deals with this all him/herself
2. Respondent knows about some of it but not all
3. Respondent does not deal with this at all

{IF SOMEONE ELSE DEALS WITH PAYMENTS FOR CARE (WHO DEAL=2 OR 3}

Finhelp

INTERVIEWER: ASK RESPONDENT WHETHER THE PERSON WHO DEALS WITH PAYMENTS IS CURRENTLY AT HOME AND COULD ASSIST WITH THIS SECTION (IF THE RESPONDENT WISHES). USE DISCRETION TO DECIDE WHETHER THIS IS APPROPRIATE. IF THIS PERSON IS AVAILABLE, CONTINUE WITH THIS SECTION ADDRESSING QUESTIONS TO RESPONDENT AND THE PERSON THEY HAVE CHOSEN. IF NO ONE IS AVAILABLE CONTINUE WITH THIS SECTION WITH THE RESPONDENT ALONE.

NB - individual surveys may need to adjust this to fit in with their concurrent interviewing requirements and rules about proxies. The answer codes as Whoans may need to be amended based on whether proxies are allowed in the survey.

The following questions use the phrase Local Authorities/ councils/ social services and the same terms are used throughout this module. If interviewers have already established how respondents refer to the LA they can use one term, alternatively they can treat the / as commas and read all three. In the future if one or more term becomes obsolete the wording can be changed.
{ASK IF ANY FORMAL CARERS AT HelpForm, OR INFORMAL CARERS HelpInf, FOR 20+ HOURS (HelpHours=6, 7, 8 or 9/HelpHoursB=2 or 3)}

SHOWCARD

HaveDP
Local Authorities/councils/social services offer different ways of arranging payment for people’s care. This card describes some of these ways. Please look at the card and tell me whether either of these apply for the care you receive?

INTERVIEWER: Only include payments for social care. Do not include other payments, for example from a pension or from benefits such as Attendance Allowance.

INTERVIEWER: IF RESPONDENT SELECTS ONLY ONE ANSWER (1 OR 2) PROBE FOR THE OTHER ONE: Does the other one also apply?

CODE ALL THAT APPLY (1 and 2 can be coded together, 3 can only be coded on its own).
1. Direct payments
2. Council manages the money
3. Neither of these

SHOWCARD

1. **Direct Payments** where the council gives you a payment to meet some or all of your social care needs. You can then choose how to spend the money. This should not be confused with benefits paid directly into a bank account which may also be called direct payments.

2. **The council manages the money** they give you to meet some or all of your social care needs, and you may be able to choose which services to use.

3. **Neither of these**

{ASK IF ANY FORMAL CARERS AT HelpForm, OR INFORMAL CARERS HelpInf, FOR 20+ HOURS (HelpHours=6, 7, 8 or 9/HelpHoursB=2 or 3)}

PersB
Do you have a **Personal Budget**, sometimes known as an **Individual Budget**? This is when the Local Authority/council/social services decides the amount or pot of money necessary to meet your social care needs. You can choose how to spend this money which can be used for a range of services, not just social care.

**EXPLAIN IF NECESSARY:** The money could be paid to you as a Direct Payment or the council could manage the money for you.

1. Yes, have Personal Budget/Individual budget
2. No do not have Personal Budget/Individual Budget

{ASK IF ANY FORMAL CARERS AT HelpForm, OR INFORMAL CARERS HelpInf, FOR 20+ HOURS (HelpHours=6, 7, 8 or 9/HelpHoursB=2 or 3)}

IncAss
Has the local authority or council made an assessment of what you can afford for any of your care needs? This is sometimes called an income assessment or means testing.

**EXPLAIN IF NECESSARY:** This might have been when the council was organising care services or arranging a Direct Payment for your care.

1. Yes, had income assessment
2. No
**LOOPEED QUESTION**

{ASK ONCE FOR EACH FORMAL PROVIDER AT HelpForm}

**SHOWCARD N**

LAhelp

How was the help from [person who helps] arranged? Please look at this card and tell me which option applies.

1. Arranged without involvement from the local authority, council or social service
2. Local authority, council or social services arranged this help for me
3. Local authority, council or social services told me about the help but I arranged it myself or my family arranged it for me
4. Other

**ROUTE A: QUESTIONS FOR FORMAL PROVIDERS ARRANGED THROUGH LOCAL AUTHORITY**

This set of questions are asked once to cover all providers for which the answer to LAHelp was 2 or 3 (Local Authority arranged or directed R to care). This is because the LA may arrange a package of care for which one charge is made.

**ASK FOLLOWING QUESTIONS ONCE**

{IF LAHelp=2 or 3 for any of the providers, AnyPay is asked for all these providers together}

**Anypay**

Do you [IF PARTNER LIVES IN HHLD: or your partner] pay or give any money for the help given by [list of all formal providers who helped]? Please include any payments made for this care, even if not made directly to the care provider.

1. Yes
2. No

{IF ANYPAY=1 (RESPONDENT OR PARTNER PAYS SOMETHING FOR ANY OF THIS LOCAL AUTHORITY CARE)}

**PayAmt**

How much money do you [IF PARTNER LIVES IN HHLD: or your partner] pay for the help given by [list of all formal providers who help]? Please include any payments made for this care, even if not made directly to the care provider?

INTERVIEWER: RECORD AMOUNT GIVEN BY RESPONDENT (pounds and pence) AND REFERENCE PERIOD.

Enter amount in pounds and pence on this screen Range: 0…20,000.
Enter reference period for payment on next screen.

RESPONSE:__________________

**Payfreq**

INTERVIEWER: ENTER REFERENCE PERIOD FOR THE PAYMENT

1. Per hour
2. Per visit
3. Per day
4. Per week
5. Per fortnight
6. Per four weeks
7. Per calendar month
8. Per year
(IF ANYPAY=1 (RESPONDENT OR PARTNER PAY ANYTHING FOR THIS LOCAL AUTHORITY ARRANGED CARE))

Allcost
Does this payment cover all the cost of this help or some of the cost of this help?
INTERVIEWER EXPLAIN IF NECESSARY: The payment for [list of all formal providers who help]

1. All
2. Some

(If ANYPAY=1 (RESPONDENT OR PARTNER PAY ANYTHING FOR THIS LOCAL AUTHORITY ARRANGED CARE))

SHOWCARD P
Howpay
How do you usually pay or give money for the care provided by [list of all formal providers who help] for helping you?

CODE ALL THAT APPLY
SHOWCARD P
I use money from:
1. my own personal income, savings, pension or benefit (such as Attendance Allowance)
2. my Direct Payment or Personal or Individual Budget from the Local Authority/ council/Social Services
3. from another source

{ASK ONCE TO COVER ALL FORMAL PROVIDERS ARRANGED BY LOCAL AUTHORITY}
{IF LAHelp=2 or 3 for any of the providers, AnyPay is asked for all these providers together}

Addpay
(+And in addition to what you pay), as far as you are aware does anyone else or any organisation pay or give money to [list of all formal providers who help] for the care you receive - for example the council or a family member. Do not count any benefits such as Carers Allowance or Attendance Allowance?
INTERVIEWER CODE:
1. Yes, the council / local authority /social services
2. Yes, a family member (with their own money)
3. Yes, other
4. No, nobody else pays

+Text fill in question above is only appropriate if R pays anything themselves (AnyPay =yes)

(If ADDPAY=1 (LA PAYS))

LAPay
And does the local authority, council or social services pay [list of all formal providers who help] directly or is it through your Direct Payment or a Personal Budget?
CODE ALL THAT APPLY:
1. Social services or council pay directly
2. Paid through Direct Payments / Personal or Individual Budgets
{IF LOCAL AUTHORITY PAYS ANY MONEY THROUGH A DIRECT PAYMENT OR PERSONAL BUDGET (LAPAY) (LAPAY=2 OR HOWPAY=2) }

LAAmt
How much money is [list of all formal providers who help] paid from the direct payment or personal budget for helping you?
INTERVIEWER: RECORD AMOUNT GIVEN BY RESPONDENT (pounds and pence) AND REFERENCE PERIOD.
Enter amount in pounds and pence on this screen: Range: 0…20,000. Enter reference period for payment on next screen.

LAFreq
1. Per hour
2. Per visit
3. Per day
4. Per week
5. Per fortnight
6. Per four weeks
7. Per calendar month
8. Per year

{IF ADDPAY=NO AND ADDPAY=NO (NOTHING IS PAID FOR THE CARE ARRANGED BY THE LOCAL AUTHORITY) }

Nopay
You have told me that no payment was made for [list of all formal providers who help] helping you. Why was this?

UNPROMPTED RESPONSE:
1. They provided their help for free/there is no charge for the service
2. Sometimes I give them money or gifts for the help they give me
3. Other

8 Note that this question is not being used in HSCS and may be developed by ELSA (to include other payments in kind such as inheritance) when the module is implemented.
ROUTE B: SECTION OF QUESTIONS FOR FORMAL PROVIDERS NOT ARRANGED THROUGH LOCAL AUTHORITY AND FOR INFORMAL PROVIDERS WHO PROVIDED 20 OR MORE HOURS OF CARE IN THE LAST WEEK (HelpHours=6,7,8 OR 9)

To be asked once if Route A already asked, or twice if Route A not asked (if there are eligible providers).

Priorities:
1. 1st Home care worker/home help/personal assistant NOT arranged via council (the one providing most hours)
2. 2nd Home care worker/home help/personal assistant NOT arranged via council (the one providing next most intense help in hours)
3. Person other than home care worker/home help/personal assistant providing most hours: Formal (whatever number of hours) or Informal (only if providing more than 20 hours). If there is more than one provider giving the same hours, this would be the formal provider over an informal provider. Someone living in same household should be given priority over a non resident. The provider higher up the list at HelpInf and HelpForm would take priority over those lower down the lists, if the rules above have not determined who should go through the loop.

{ASK ONCE TO COVER ALL FORMAL PROVIDERS NOT ARRANGED BY LOCAL AUTHORITY {IF LAHelp=1 for all of the formal providers, AnyPay is asked for all these providers together}

ASK ONCE FOR EACH INFORMAL PROVIDER

AnyPay

Do you [IF PARTNER LIVES IN HHLD: or your partner] pay or give any money for the help given by [person who helps]? Please include any payments made for this care, even if not made directly to the care provider. Do not include gifts, treats or occasional payments of expenses such as petrol money or lunch.

1. Yes
2. No

{IF ANYPAY=1 (RESPONDENT OR PARTNER PAYS)}

PayAmt

How much money do you pay for the help given by [person who helps]? Please include any payments made for this care, even if not made directly to the care provider.

INTERVIEWER: RECORD AMOUNT GIVEN BY RESPONDENT (pounds and pence).
INTERVIEWER: Record amount and reference period given by respondent.
Enter amount in pounds and pence on this screen Range: 0…20,000.
Enter reference period for payment on next screen.

PayFreq

INTERVIEWER: ENTER REFERENCE PERIOD FOR THE PAYMENT

1. Per hour
2. Per visit
3. Per day
4. Per week
5. Per fortnight
6. Per four weeks
7. Per calendar month
8. Per year
{IF ANYPAY=1 (RESPONDENT OR PARTNER PAYS)}

**Allcost**
Does this payment cover all the cost of this help or some of the cost of this help? EXPLAIN IF NECESSARY: the payment for [person who helps]

1. All
2. Some

{IF ANYPAY=1 (RESPONDENT OR PARTNER PAYS)}

**HowPay SHOWCARD P**
How do you usually pay or give money to [person who helps] for helping you? CODE ALL THAT APPLY

I use money from:
1. my own personal income, savings, pension or benefit (such as Attendance Allowance)
2. my Direct Payment/ Personal or Individual Budget from the Local Authority/ council/ Social Services
3. from another source

{IF ANYPAY=1 (RESPONDENT OR PARTNER PAYS)}

**AddPay**
(+And in addition to what you pay), as far as you are aware does anyone else or any organisation pay or give money to [person who helps] for the care you receive - for example the council or a family member? Do not count any benefits such as Carers Allowance or Attendance Allowance.
INTERVIEWER CODE:
1. Yes, the local authority /council / social services
2. Yes, a family member (with their own money)
3. Yes, other
4. No, nobody else pays

+Text fill in question above is only appropriate if R pays anything themselves (AnyPay =yes)

{IF AddPay=1 (COUNCIL/ LOCAL AUTHORITY pays)}

**LApay**
And does the local authority, council or social services pay [person who helps] directly or is it through your Direct Payment or a Personal Budget?
CODE ALL THAT APPLY:

1. Social services or council pay directly
2. Paid through Direct Payments / Personal or Individual Budgets
{IF LOCAL AUTHORITY PAYS ANY MONEY THROUGH A DIRECT PAYMENT OR PERSONAL BUDGET (LAPAY=2 OR HOWPAY=2)}

**DPPay**
How much money is [person who helps] paid from the direct payment or personal budget for helping you?

INTERVIEWER: RECORD AMOUNT GIVEN BY RESPONDENT (pounds and pence).
INTERVIEWER: Record amount and reference period given by respondent.
Enter amount in pounds and pence on this screen Range: 0…20,000.
Enter reference period for payment on next screen.

**DPFreq**
1. Per hour
2. Per visit
3. Per day
4. Per week
5. Per fortnight
6. Per four weeks
7. Per calendar month
8. Per year

{IF NOTHING IS PAID FOR THE CARE (ANYPAY=2 AND ADDPAY=4)}

**NoPay**
You have told me that no payment was made for [person who helps] helping you. Why was this?

UNPROMPTED RESPONSE:
1. They provided their help for free/there is no charge for the service
2. Sometimes I give them money or gifts for the help they give me
3. Other

**INTERVIEWER CODE FOR ALL WHO HAVE BEEN ASKED ANY QUESTIONS IN PAYMENTS SECTION**

**Whoans**
INTERVIEWER: WHO ANSWERED THE QUESTIONS IN THIS SECTION?
1. Respondent only
2. Respondent with assistance of another person
3. Another person with limited input from respondent
4. Another person with no input from the respondent

**Nowresp**
INTERVIEWER: NOW RETURN TO INTERVIEWING THE RESPONDENT ALONE (WITHOUT THE ASSISTANCE OF ANYONE ELSE)
1 and continue.
{ASK ALL AGE 65+}
INTERVIEWER READ OUT... I’m now going to ask you about services that people can make use of.

{ASK ALL AGE 65+}

MealProv
In the last month, have you regularly had your meals provided for you?
EXPLAIN IF NECESSARY: Provided by someone who is not living here with you?
INTERVIEWER: Don’t count meals eaten elsewhere.

1. Yes
2. No

{IF MealProv=1}

Meals
SHOWCARD L
Who provided your meals? PROBE: Who else?
INTERVIEWER EXPLAIN IF NECESSARY: Meals on Wheels may be provided by the council or another organisation
PLEASE CHOOSE ALL THAT APPLY

1. Meals on Wheels
2. Private frozen meal provider such as Wiltshire farm foods
3. Family, friend or neighbour brought me ready prepared meals
4. Other
5. None of the above

{IF MEALS=1}
SHOWCARD M
MWtimesc
About how often did you have meals on wheels in the last month?
1. Every day or nearly every day
2. Two to three times a week
3. Once a week
4. Less often

{ASK ALL AGE 65+}

LnchClub
In the last month did you attend a lunch club run by the council or a voluntary body?
1. Used in the last month
2. Not used in the last month

{IF LNCHCLUB=1}
SHOWCARD M
LCTimes
About how often did you attend the lunch club(s) in the last month?
1. Every day or nearly every day
2. Two to three times a week
3. Once a week
4. Less often
DayCen
And in the last month did you attend a Day Centre? Please include groups or classes run by a day centre but not necessarily held at the day centre building.
1. Used in the last month
2. Not used in the last month

{IF DAYCEN=1}
SHOWCARD M
CenTimes
About how often did you go to the day centre, including attending classes or groups run by the day centre, in the last month?
1. Every day or nearly every day
2. Two to three times a week
3. Once a week
4. Less often

{IF DAYCEN=1}
CenDur
Each time that you have attended the day centre, including attending classes or groups run by the day centre, in the last month, about how many hours did you usually spend there?
Was it...READ OUT
1. 1-3 hours,
2. 4-6 hours, or
3. more than 6 hours

{ASK ALL AGE 65+}
SHOWCARD YYY
Produce
And in the last month have you had food delivered to you by any of the following?
PLEASE CHOOSE ALL THAT APPLY

1. Internet or telephone food delivery e.g. Tesco or Ocado
2. Milkman delivering food
3. Vegetable delivery company (e.g. Abel and Cole or Riverford)
4. Family, friend or neighbour brought shopping to my house
5. Other
6. None of the above
**A7 - AIDS AND EQUIPMENT (ASK TO ALL AGED 65+ EVEN IF RECEIVED NO HELP WITH CARE TASKS AT TasksHelp).**

THIS SECTION STANDS ALONE AND CAN BE INCLUDED OR NOT IN A SHORTER VERSION OF THE QUESTIONNAIRE, THOUGH IN MOST CASES IT WOULD NOT BE. IT SHOULD BE INCLUDED IN A LONG VERSION OF THE MODULE. WE WOULD ADVISE THAT THE MOBILITY QUESTION (Mobility) IS ASKED IF THE SURVEY DOES NOT COLLECT MOBILITY DATA ELSEWHERE.

{ASK ALL AGE 65+}
INTERVIEWER READ OUT...I’ve just asked you about payments for services that you receive but we are also interested in whether people have any aids or equipment to help them stay in their own homes.

SENALARM AND STAIRLIFT DON’T HAVE TO BE INCLUDED IN A SHORT VERSION OF THE MODULE. HOWEVER IF A QUESTIONNAIRE INCLUDES EQUIP2 AND THE OTHER EQUIPMENT QUESTIONS, SENALARM AND STAIRLIFT MUST BE ASKED FIRST FOR COMPARABILITY – WITHOUT THOSE QUESTIONS ANSWERS TO EQUIP2 WILL BE DIFFERENT.

{ASK ALL AGE 65+}
**SenAlarm**
Do you have an alarm which you can use to call for help. This could be worn round your neck or may be a button or pull cord in your home. Please tell me about any alarms you have even if you have not had to use them? INTERVIEWER IF NECESSARY: Please do not tell me about alarm clocks, timers, smoke or burglar alarms.
1. Yes
2. No

{ASK ALL AGE 65+}
**Stairlift**
Do you have a stairlift for your use at home? Please include any stairlift which you use for getting up and down stairs on a regular basis, even if it was not installed for you.
1. Yes
2. No
3. Not applicable (no stairs in property/there is a lift instead/live on ground floor)

{ASK ALL AGE 65+}
**SHOWCARD X Equip2**
Have you used or received any other equipment or adaptations such as those shown on this card to help you with daily living. Please include similar items which are not listed on the card? INTERVIEWER: PLEASE ONLY INCLUDE EQUIPMENT RESPONDENT HAS TO USE THEMSELVES. DO NOT INCLUDE STAIRLIFTS
1. Yes
2. No
SHOWCARD X

**Whequip**
Which of the equipment or adaptations shown on this card do you have for your use, even if it was not installed or provided for you?
1. Bed lever/ bed rail
2. Toilet equipment/commode
3. Hoist
4. Outdoor railing
5. Outdoor ramp
6. Grab rail/stair rail
7. Walk in shower
8. Over bath shower
9. Other changes to bathroom
10. Other (please specify)

SHOWCARD R

**Mobility**
Do you currently use any of these?
INTERVIEWER: ITEMS USED INDOORS AND/ OR OUTDOORS SHOULD BE INCLUDED.
CODE ALL THAT APPLY
1. A manual wheelchair
2. An electric wheelchair
3. A mobility scooter
4. Elbow crutches
5. Walking stick
6. Zimmer frame or other walking frame
7. Other (please specify)
8. None of these
9. I don’t need anything like this to get around.

SHOWCARD S

**SheltType**
Please look at this card and tell me whether you currently live in any of these types of accommodation?
1. Warden maintained or sheltered accommodation
2. Housing with care, extra care housing or very sheltered accommodation
3. Residential care e.g. nursing home or care home
4. Other type of supported housing (Please specify)
5. None of the above
B: PROVISION OF CARE

B1 - IDENTIFYING PROVIDERS OF CARE AND WHO IS HELPED

This module has been designed and tested to ask people aged 16+ about care given to people aged 65+. However there is scope for flexibility and HSE are including help given to all adults aged 16+.

{ASK ALL AGED 16+}
INTERVIEWER READ: The next few questions are about help or support that people provide to others. (We are only interested in help and support provided to people because they have long-term physical or mental ill-health, disability or problems relating to old age)⁹.

ProvHlp
Have you personally provided help or support to anyone in the last month because they have long-term physical or mental ill-health, disability or problems relating to old age? Do not include help given in a professional capacity or as part of a job but include help or support given to your family, friends or neighbours.

INTERVIEWER: Include help for wife, husband or partner
1. Yes
2. No → GO TO END.

{If ProvHlp=1}
CheckHlp
Can I just check, are you only including help or support that you give this person/these people because they have long-term physical or mental ill-health, disability or problems relating to old age, or were you thinking about help more generally?

1. Yes, thinking of help/support given because of health/old age
2. No, was only thinking about help more generally → GO TO END.

{If ProvHlp=1 and CheckHlp=1}
HelpNo
How many people aged 65 or over do you provide this kind of help and support to?
UNPROMPTED RESPONSE:

Range 0….20

The rest of this module (i.e. up until the end of the questionnaire) is asked if the respondent helps someone who is aged 65 or over (HelpNo=1 or more).

{IF 4 OR MORE AT HelpNo}
Intro
Now I’d like you to think about the three people aged 65 or over that you provide the most help and support to.

⁹ HSE have not included the wording in brackets.
\{IF MORE THAN ONE at HelpNo\}\n
**PrName1**
Just so I can refer to them later on, I’d like to take down their first names. What are their names?
WRITE IN FIRST NAME OF FIRST PERSON CARED FOR

**PrName2**
What are their names?
WRITE IN FIRST NAME OF SECOND PERSON CARED FOR

**PrName1**
What are their names?
WRITE IN FIRST NAME OF THIRD PERSON CARED FOR

Questions PrHelp through to GendHelp to be asked in a loop for each person aged 65+ cared for.

\{If ProvHlp=1 and CheckHlp=1 and HelpNo>1\}\n
**PrRel**
SHOWCARD T
Thinking about [the person you help/ answer from PrName1/2/3], what is their relationship to you?

1. Husband/Wife/Partner
2. Mother/ father (including mother-in-law/ father-in-law)
3. Son (including step son, adopted son or son in law)
4. Daughter (including step daughter, adopted daughter or daughter in law)
5. Grandparent
6. Grandchild (including Great Grandchildren)
7. Brother / Sister (including step / adopted / in laws)
8. Niece / Nephew
9. Other family member
10. Friend
11. Neighbour
12. Somebody I help as a professional carer
13. Somebody I help as a voluntary helper
14. Other (PLEASE SPECIFY)

No further follow up if professional care giver (PrRel=12) – go to end of the questionnaire.

Questions PrRel and PrHHold to be asked for each person cared for except for people helped with respondent being a Neighbour/ Voluntary Helper
\{If ProvHlp=1 AND HelpNo=1 OR MORE\}\n
**PrHHold**
Does [your answer at PrRel]/ [answer from PrName1/2/3], who you help, live in the same household as you or in a different household?
1. Same household
2. Different household

\{If PrHHold=1 (same household)\}\n
**HHGrid**
**CODE HH GRID No.** age and sex will be taken from household grid.
{IF PrHhold=2 or no household grid}

**AgeHelp**
How old is [your answer at PrRel] /[answer from PrName1/2/3]?

{IF PrHhold=2 or no household grid, unless PrRel= 3 or 4}

**GendHelp**
INTERVIEWER CODE OR ASK: Is [your answer at PrRel] /[answer from PrName1/2/3] male or female?  
1. Male  
2. Female

---

**B2 - INTENSITY OF CARE (HOURS)**

FOR EACH PERSON WHO IS HELPED LOOP PrHours AND PrHours AS APPLICABLE

INTRODUCTION: I'm going to ask you about the amount of time you spend helping. Please look at SHOWCARD U, the next question is about the time you spend in person helping with tasks like this.  
INTERVIEWER: Please ensure the respondent has sufficient time to look at Showcard U.

**PrHours**  
SHOWCARD W  
Thinking only about the types of tasks and activities I showed you, how many hours did you spend helping [your answer at PrRel] /[answer from PrName1/2/3] in the last week?  
INTERVIEWER EXPLAIN IF NECESSARY: not help over the phone or by internet, or doing occasional errands or odd jobs without the respondent.  
INTERVIEWER NOTE: ROUND DOWN IF NECESSARY, e.g. IF 4.5 HOURS, CODE '1-4 hours'  
INTERVIEWER: IF YOU THINK THE ANSWER MAY BE A DAILY AMOUNT, CHECK 'So that is xx hours in the last week?'; CHANGE ANSWER IF NECESSARY

1. No help in the last week  
2. Less than one hour  
3. 1-4 hours  
4. 5-9 hours  
5. 10-19 hours  
6. 20-34 hours  
7. 35-49 hours  
8. 50-99 hours  
9. 100 hours or more
{If PrHours= don’t know or refusal

PrHours2
Thinking of the same type of help you give [your answer at PrRel]/ [answer from PrName1/2/3], can you tell me whether in the last week you helped him/her:.....READ OUT....
1. For less than 20 hours
2. For 20-34 hours
3. Or for 35 hours or more?
{If PrHours= 1(no help in the last week)}
SHOWCARD X

PrUsHrs
How many hours do you help [your answer at PrRel]/ [answer from PrName1/2/3] in a usual week?

1. Less than one hour per week
2. 1-4 hour per week
3. 5-9 hours per week
4. 10-19 hours per week
5. 20-34 hours per week
6. 35-49 hours per week
7. 50-99 hours per week
9. 100 hours or more per week

{ASK ONCE IF CARE FOR MORE THAN ONE PERSON (Helpno=2 or more)}

PrOldHr
SHOWCARD X
Thinking about the total time you spend providing support or help to all of the people aged 65 and over that you care for, [answer from PrName 1/2/3], about how many hours altogether did you spend last week helping them?
INTERVIEWER EXPLAIN IF NECESSARY: not help over the phone or by internet, or doing occasional errands such as picking up the odd prescription for the person.
INTERVIEWER NOTE: ROUND DOWN IF NECESSARY, e.g. IF 4.5 HOURS, CODE ‘1-4 hours’
INTERVIEWER: IF YOU THINK THE ANSWER MAY BE A DAILY AMOUNT, CHECK ‘So that is xx hours in the last week?’; CHANGE ANSWER IF NECESSARY

1. Less than one hour per week
2. 1-4 hour
3. 5-9 hours
4. 10-19 hours
5. 20-34 hours
6. 35-49 hours
7. 50-99 hours
8. 100 hours or more
B3 - DETAILS OF HELP GIVEN, SUPPORT RECEIVED AND PAYMENTS FOR CARING

THE REST OF THE QUESTIONS IN THIS SECTION WILL BE LOOPED FOR UP TO 2 PEOPLE CARED FOR, WHERE 20 HOURS OR MORE HELP WAS GIVEN IN THE LAST WEEK (I.E. PRHOURS=6,7,8 OR 9)

{THIS QUESTION IS IN A LOOP FOR UP TO TWO PEOPLE}
SHOWCARD U

Prtask
Which of the following activities do you help or support [your answer at PrRel] [answer from PrName1/2/3] with? Please think only of help or support given because of long-term physical or mental ill-health, disability or problems relating to old age.
CODE ALL THAT APPLY
1. getting the person in and out of bed
2. washing their face and hands
3. having a bath or a shower, including getting in and out of the bath or shower
4. dressing or undressing, including putting on shoes and socks
5. using the toilet
6. eating, including cutting up food
7. taking the right amount of medicine at the right times. INTERVIEWER: Include prescribed medicines and medicines you can buy over the counter
8. getting around indoors
9. getting up and down stairs
10. getting out of the house, for example to go to the doctors or to visit a friend
11. shopping for food including getting to the shops, choosing the items, carrying the items home and then unpacking and putting the items away
12. doing routine housework or laundry
13. doing paperwork or paying bills

{THIS QUESTION IS IN A LOOP FOR UP TO TWO PEOPLE}
SHOWCARD Y

Recpay
Do you receive any money for helping [your answer at PrRel]/ [answer from PrName1/2/3]?
INTERVIEWER DO NOT INCLUDE GIFTS, TREATS OR OCCASIONAL PAYMENTS OF EXPENSES SUCH AS PETROL MONEY OR LUNCH

CODE ALL THAT APPLY
1. Yes, this person pays me from their own income, pensions or savings
2. Yes, this person pays me from a personal budget or direct payment
3. Yes, I receive a carer’s allowance
4. Yes, I receive money in another way
5. No, I receive no money for helping this person.
[IF Recpay=1,2,3 or 4]

**RecPAmt**

How much do you receive?

INTERVIEWER: RECORD AMOUNT GIVEN BY RESPONDENT (pounds and pence) and reference period.
Enter amount in pounds and pence on this screen.
Enter reference period for payment on next screen.

**RecPFreq**

INTERVIEWER: ENTER REFERENCE PERIOD FOR THE PAYMENT

1. Per hour
2. Per visit
3. Per day
4. Per week
5. Per fortnight
6. Per four weeks
7. Per calendar month
8. Per year

{THIS QUESTION IS IN A LOOP FOR UP TO TWO PEOPLE}

SHOWCARD AA

**RecSupp**

Does [your answer at PrRel]/[answer from PrName1/2/3] receive any of these types of support?

CODE ALL THAT APPLY

**This person:**
1. Attends a day centre or lunch club
2. Receives help from professional care staff (e.g. home help/care worker)
3. Receives meals on wheels
4. Receives help from a Nurse or Health Visitor
5. Lives in sheltered or very sheltered housing
6. Receives other types of support
7. No, none of these
THIS SECTION OF QUESTIONS IS NOT NEEDED FOR THE SHORT MODULE, THOUGH SURVEYS WITH A PARTICULAR INTEREST IN CARING COULD INCLUDE THIS (e.g HSE).

INSERT AN INTRODUCTION: “The next few questions are about the effects of caring on you and about support you may receive with your care responsibilities”

[THIS QUESTION IS IN A LOOP FOR UP TO TWO PEOPLE]
SHOWCARD Z
Support
Do you receive any of these types of support in caring for [your answer at PrRel]/ [answer from PrName1/2/3]? Please think only about help or support given directly to you.
(Please read out the numbers that apply from this card)

CODE ALL THAT APPLY
1. Help from GP or nurse
2. Access to respite care
3. Help from professional care staff
4. Help from carers’ organisation or charity
5. Help from other family members
6. Advice from local authority/ social services
7. Help from friends/neighbours
8. No, I don’t receive any of these

[ASK ONCE ABOUT ONE OR ALL PEOPLE CARED FOR]
SHOWCARD BB
[IF Helpno=1]
HealthA
In the last three months, has your own health been affected, in any of the ways listed on this card, by the help or support that you give to [your answer at PrRel]?
(Please read out the numbers that apply from this card)

IF Helpno=2 OR MORE]
HealthA
In the last three months, has your own health been affected, in any of the ways listed on this card, by the help or support that you give the people aged 65 or over that you care for?
(Please read out the numbers that apply from this card)

CODE ALL THAT APPLY
1. Feeling tired
2. Feeling depressed
3. Loss of appetite
4. Disturbed sleep
5. General feeling of stress
6. Physical strain
7. Short tempered
9. Developed my own health condition
10. Made an existing condition worse
11. Other
12. No, none of these
{If Health1=1 -11}
{IF Helpno=1}

**HealthGP**

Have you seen your GP because your health has been affected by the support you give to [your answer at PrRel]?

1. Yes
2. No

{If Health1=1 -11}
{IF Helpno=2 OR MORE}

**HealthGP**

Have you seen your GP because your health has been affected by the support you give to the people aged 65 or over that you care for?

1. Yes
2. No

{ASKED IF R IS AGE 64 OR UNDER}

**SHOWCARD CC**

**HlthEmp**

Has your ability to take up or stay in employment been affected, in any of the ways listed on this card, by the help or support that you give [your answer at PrRel]/ the people aged 65 or over that you care for? Please read out the numbers that apply from the card.

**CODE ALL THAT APPLY**

1. Left employment altogether
2. Took new job
3. Worked fewer hours
4. Reduced responsibility at work
5. Flexible employment agreed
6. Changed to work at home
7. Other
8. Employment not affected

{ASK ONCE FOR ALL WHO CARE FOR SOMEONE AGED 65+}

**LAass**

Have the Local Authority (council) carried out a carer’s assessment as a result of the help or support that you provide to give [your answer at PrRel]/ the people aged 65 or over that you care for? 

1. Yes
2. No
APPENDIX A– DERIVED VARIABLES TO INCLUDE WITHIN CAPI PROGRAM

Derived analysis variables
The CAPI program will include some derived variables to be produced within Blaise. The key ones are shown below and will be applicable to both short and long versions of the module. Suggested rules are provided to indicate what was intended. Note that where a ~ is used, cases which are missing on that variable should also be included and treated as ~

HELP NEEDED AND HELP RECEIVED

ADLs and IADLs
The ADLs and IADLS selected for the first two questions (Tasks and TaskHelp) have been chosen because together with the bladder and bowel problems questions they feed into the Katz and Barthel indices. The Katz and Barthel indices are measures of Activities of Daily Living, i.e. measures of functioning for various personal tasks. Shopping and paying bills are classified as Instrumental Activities of Daily Living, i.e. tasks that are necessary for the achievement of more basic functions (shopping for feeding, for example).

One of the purposes of using indices is to produce a summary score, and thus enable comparisons to be made across studies. Katz and Barthel indices are two that have been widely used in studies in the UK, the US and elsewhere, particularly of people in various forms of residential care, but also of people living in their own homes.

More detailed information about how to construct these summary measures from the data produced by this questionnaire module will be made available on the study website: http://www.natcen.ac.uk/social-care-questions-for-over-65s

PAYMENTS SECTION

Note that the payments questions are only asked up to two times (for a group of local authority arranged providers together and then for individual providers after that). Note that the module has been designed to maximise the chance of asking about providers for which payments are likely to have been made but is should be noted that the derived variables below can only draw on information provided in the interview. While the information from the two providers can be combined it should be noted that in a few cases payments will be made by the individual or LA to providers not asked about in the payments section.

Because many of the questions used are multicoded, each question will have multiple variables and the rules should be used across all relevant variables for a multicoded question
### Paytype  What, if anything, respondent pays for care

Derived from answers to Anypay, Allcost, HowPay and Addpay (route A and route B separately (for provider or grouped LA providers) but could then be further derived into combined variable)

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
<th>Rules</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Respondent pays all costs of care</td>
<td>(Anypay=1, and (Allcost=1 and Howpay~2</td>
</tr>
<tr>
<td>2</td>
<td>Respondent pays some of costs of care</td>
<td>(Anypay=1 and (Allcost=2 or (Howpay=1 and Howpay=2</td>
</tr>
<tr>
<td>3</td>
<td>Respondent pays none of costs of care</td>
<td>(Anypay=2 or Anypay=1 &amp; Howpay~1)</td>
</tr>
</tbody>
</table>

### DirectP  Whether respondent has a direct payment

Derived from answers to HaveDP across the two modules and HowPay and LAP Pay

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
<th>Rules</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Respondent on a direct payment</td>
<td>(HaveDP=1)</td>
</tr>
<tr>
<td>2</td>
<td>Respondent may have direct payment and/or personal budget but not sure which</td>
<td>(HaveDP~1 and (Howpay (in either route)= 2 or LAPay (in either route=2)).</td>
</tr>
<tr>
<td>3</td>
<td>Respondent has neither of these</td>
<td>(HaveDP~1 and (Howpay (in either route)<del>2 or LAPay (in either route</del>2)).</td>
</tr>
</tbody>
</table>

Note: that data for whether the respondent has a personal budget should be taken from PersB. Although HowPay and LAPay refer to personal and individual budgets the context of the question is really about how payments are made which relate to direct payments which is why they have been chosen to feed into a direct payments derived variable. Also a respondent may have a direct payment and a personal budget or a direct payment with no personal budget or a personal budget not paid through a direct payment so they cannot be combined in one derived variable with separate categories for them.

### DPPBplus Patterns of payment for those with DP/PB (relates to one route through questionnaire)

Information about personal budgets and direct payments is at an individual level, while information about whether some or none is paid by respondent is at a provider (or grouped LA arranged providers) level. Derived from answers to DPPB (at individual level) and PayType (at provider level)

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
<th>Rules</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Respondent has DP/PB and makes no payments from own income</td>
<td>((DPPB=1</td>
</tr>
<tr>
<td>2</td>
<td>Respondent has DP/PB and tops up with own money</td>
<td>((DPPB=1</td>
</tr>
<tr>
<td>3</td>
<td>Respondent does not have DP/PB</td>
<td>DPPB=4 and PersB=2</td>
</tr>
</tbody>
</table>
LAPAY *Way in which LA pays*
This is at the provider level (or grouped LA arranged providers) but could be combined across providers

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
<th>Rules</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>LA pays directly only</td>
<td>(((\text{Addpay}=1 \land (\text{LAPay}=1 \land \text{LAPay} \neq 2)) \land (\text{Anypay}=2 \lor (\text{AnyPay}=1 \land \text{HowPay} \neq 2))))</td>
</tr>
<tr>
<td>2</td>
<td>LA pays though DP/PB only</td>
<td>(((\text{LAPay}=2 \land \text{LAPay} \neq 1)) \lor (\text{Addpay} \neq 1 \land \text{HowPay}=2)))</td>
</tr>
<tr>
<td>3</td>
<td>LA pays by combination of directly to provider and through DP/PB</td>
<td>(((\text{Addpay}=1 \land (\text{LAPay}=1 \land \text{LAPay}=2)) \lor (\text{Howpay}=2 \land \text{Addpay}=1 \land \text{LAPay}=1)))</td>
</tr>
<tr>
<td>4</td>
<td>LA does not pay anything for care</td>
<td>\text{HowPay} \neq 2 \land \text{Addpay} \neq 1</td>
</tr>
</tbody>
</table>
APPENDIX B – TEXT FILLS

GENERAL

Referring to Local Authority/ Social Services/Council. In most places in the questionnaire three wordings are offered in the question wording. This leaves interviewers free to choose the wording which suits the respondent best – once they have established this they do not need to read the full wording with the three names every time. Those implementing the questionnaire in the future should consider whether all three names are still appropriate and ensure that if alternative terms for local authority start being used, these are reflected in the questionnaire.

A1: HELP NEEDED

Tasks and TaskHelp – These questions should be asked on a loop, each time inserting one of the 13 Activities of Daily Living (ADLs) or Instrumental Activities of Daily Living (IADLs).

HelpInf & HelpForm – These questions are also on a loop, so they are asked about each grouped list of ADLs/IADLs. In terms of what should be programmed in CAPI, only those recorded at TaskHelp should appear in the text fill, and would therefore be read out by the interviewer. It would make little sense to ask the respondent who has helped them with ADLs/IADLs for which they had not received help with.

At the text fills at HelpHours for home care worker/home help/personal assistant, the text fills are the person/people who help you with XXXXX.

A3: HOURS OF CARE

HrsForm must be asked on a loop for all identified at Helpform. The text fills should be as follows, though in the questionnaire this is just shown as ‘person who helps’. Note, it is important to start each text fill with the word ‘the’ where the provider is formal:
- If one homecare worker/home help/personal assistant helped then the text fill will just be [the homecare worker/home help/personal assistant].
- If more than one ‘homecare worker/home help/personal assistant’ helped, the text fill should refer to the tasks each one helps with, answer from Hhelp3 [the homecare worker who helps you with XXXXX]. The XXXXX is the same as the categories at HhelpC, with the only exception being that ‘other’ becomes ‘other things’
- If another formal carer helped, the text fill should refer to their job [the Voluntary helper].

HelpHours must be asked on a loop for all identified at Helpinf and if HrsForm=DK or if in the short version of the module. The text fills should be as follows:
- If the survey has a household grid, use the name derived from this.
- If there is no household grid, use the name collected at NameFam or NmNBour.
- If HrsForm=DK or if in the short version of the module, the name rules as stated above at HrsForm apply for the text fill.

A4: PATTERNS OF CARE

LastWk, OftHelp, DayNight, WeekEnd
For formal helpers, the text fill rules are as follows. Note, it is important to start each text fill with the word ‘the’:
- If one homecare worker/home help/personal assistant helped then the text fill will just be [the homecare worker/home help/personal assistant].
- If more than one ‘homecare worker/home help/personal assistant’ helped, the text fill should refer to the tasks each one helps with, answer from Hhelp3 [the homecare worker who helps you with going to bed].
- If another formal carer helps, the text fill should refer to their job [the Voluntary helper].

For informal helpers:
- If the survey has a household grid, use the name derived from this.
- If there is no household grid, use the name collected at NameFam or NmNBour.

**TimeDay**
The text fill rules are as follows. Note, it is important to start each text fill with the word ‘the’:
- If one homecare worker/home help/personal assistant helped then the text fill will just be [the homecare worker/home help/personal assistant].
- Even if more than one ‘homecare worker/home help/personal assistant’ helped, the text fill should still refer to [the homecare worker/home help/personal assistant] because if they are grouped the specific tasks which each one helps with are not relevant.
- If another formal provider helps, the text fill should refer to their job [the Voluntary helper].

### A5: PAYMENT FOR CARE

**ROUTE A**
Lhelp, Anypay, PayAmt, Allcost, Addpay, LApay, LAAmt, Nopay
Where the formal providers are grouped together, use the following rules for text fills. Note, it is important to start each text fill with the word ‘the’:
- If one homecare worker/home help/personal assistant helped then the text fill will just be [the homecare worker/home help/personal assistant].
- Even if more than one ‘homecare worker/home help/personal assistant’ helped, the text fill should still refer to [the homecare worker/home help/personal assistant] because if they are grouped the specific tasks which each one helps with are not relevant.
- If another formal provider helps, the text fill should refer to their job [the Voluntary helper].

**ROUTE B**
AnyPay, PayAmt, Allcost, HowPay, AddPay, LApay, Nopay
For formal helpers, the text fills are as follows. Note, it is important to start each text fill with the word ‘the’:
- If one homecare worker/home help/personal assistant helped then the text fill will just be [the homecare worker/home help/personal assistant].
- Even if more than one ‘homecare worker/home help/personal assistant’ helped, the text fill should refer to the tasks each one helps with, answer from Hhelp3 [the homecare worker who helps you with XXXXX]. The XXXXX is the same as the categories at HhelpC, with the only exception being that ‘other’ becomes ‘other things’.
- If another formal provider helps, the text fill should refer to their job [the Voluntary helper].

For informal helpers:
- If there is a household grid, use the name derived from this.
- If there is no household grid, use the name collected at NameFam or NmNBour.
- If HrsForm=DK, the name rules as stated above at HrsForm apply for the text fill.
B1: IDENTIFYING PROVIDERS OF CARE AND WHO IS HELPED

PrRel
- If the respondent only helps one person aged 65+ at HelpNo then the wording of the textfill is ‘the person you help’.
- If the respondent helps more than one person the textfill is answer from PrName1/2/3],

PrHHold, HHGrid, AgeHlp, GendHlp, PrHours, PrHours2, PrUsHrs, PrTask, RecPay
- If only one person is helped the textfill will be ‘relationship from PrRel’
- If more than one person is helped the textfill will be ‘the name of the person PrName’.

HlthEmp, LAAss
- If Respondent only helps one person the textfill will be ‘your answer at PrRe’
- If they help more than one person aged 65+ the textfill will be ‘the people aged 65 or over that you care for’