Final Version – Last modified 11/05/12

AD Diagnosis and Financial Planning

Preload needed: R is married (X065=1)
            Two Random Variables: X510_10Random1_2={1,2}
                            X509_9Random1_2 ={1,2}
Other section variables needed: NONE

Fills: {FL_husband/wife/partner}

       New Fill {FL_FiveYrFuture} constructed as follows:
       If X509_9Random1_2 = 1 then FL_FiveYrFuture = "sometime within the next 5 years"
       Else If X509_9Random1_2 = 2 then FL_FiveYrFuture = "sometime in the future"

Variables in this module: V250-V283

IF THIS IS A PROXY INTERVIEW (A009={2 *or* 3}), GO TO END OF MODULE 6

{Note: Random variable **X510_10Random1_2** determines ask order of first three questions}
If **X510_10Random1_2**= 1 then Ask:
<V250>
V250_ADSelf
CHANCES YOU WILL DEVELOP AD
Using a scale of 0-100 where 0 means no chance and 100 means absolutely certain, what are the chances that you will develop Alzheimer's Disease {FL_FiveYrFuture}?

       _____ {Range: 0 to 100}
       998. DK
       999. RF

If R not married/partnered (X065=6), go to V252:
<V251>
V251_ADSpouse
CHANCES YOUR SPOUSE/PARTNER WILL DEVELOP AD
What are the chances (using a scale of 0-100 where 0 means no chance and 100 means absolutely certain) that your {FL_husband/wife/partner} will develop Alzheimer's Disease {FL_FiveYrFuture}?

       _____{Range: 0 to 100}
       998. DK
       999. RF

<V252>
V252_ADtest
WANT AD TEST
If you could receive a test from your doctor, free of charge, that would definitely determine whether or not you would develop Alzheimer's Disease {FL_FiveYrFuture}, would you want to be tested?

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

<V253>
V253_Attorney
AD CONSULT ATTORNEY V1
If you knew you would develop Alzheimer's Disease {FL_FiveYrFuture}, how likely, using a scale of 0-100 (where 0 means no chance and 100 means absolutely certain), would you be to consult an attorney about dealing with your personal affairs?

 [IWER: Enter 997 if this was already done]

    _____ {Range: 0 to 100}
    997. Already Done
    998. DK
    999. RF

<V254>
V254_FinancialPOAs
AD POWER OF ATTORNEY V1
If you knew you would develop Alzheimer's Disease {FL_FiveYrFuture}, how likely (where 0 means no chance and 100 means absolutely certain) would you be to set up a durable power of attorney for someone to handle your financial affairs?

(A durable power of attorney allows you to name another person to make financial decisions on your behalf if you become too sick or unable to make your own decisions.)

 [IWER: Enter 997 if this was already done]

    _____ {Range: 0 to 100}
    997. Already Done
    998. DK
    999. RF

<V255>
V255_AdvDirective
AD ADVANCE DIRECTIVE V1
If you knew you would develop Alzheimer's Disease {FL_FiveYrFuture}, how likely (where 0 means no chance and 100 means absolutely certain) would you be <u>to set up an advance directive or living will</u> to let family members and doctors understand how you wish your health care to be managed?

(An advance directive is a document that tells doctors and family members what kind of medical treatments you would like to have if you become too sick or unable to communicate your own health care decisions.)

[IWER: An advance directive is also known as a living will.]

[IWER: Enter 997 if this was already done]

      _____ {Range: 0 to 100}
      997. Already Done
      998. DK
      999. RF

<V256>
V256_WillUptoDate
AD UPDATE WILL V1
(If you knew you would develop Alzheimer's Disease {FL_FiveYrFuture},) how likely (where 0 means no chance and 100 means absolutely certain) would you be to make sure that your will is up to date?

[IWER: Enter 997 if this was already done]

      _____ {Range: 0 to 100}
      997. Already Done
      998. DK
      999. RF

<V257>
V257_HealthMedical
AD DISCUSS HEALTH PLANS V1
(If you knew you would develop Alzheimer's Disease {FL_FiveYrFuture},) how likely (where 0 means no chance and 100 means absolutely certain) would you be to discuss <u>your health and medical plans</u> with loved ones?

[IWER: Enter 997 if this was already done]

      _____ {Range: 0 to 100}
      997. Already Done
      998. DK
      999. RF

<V258>
V258_DiscussFinPlans
AD DISCUSS FINANCIAL PLANS V1
(If you knew you would develop Alzheimer's Disease {FL_FiveYrFuture},) how likely (where 0 means no chance and 100 means absolutely certain) would you be to discuss <u>your financial plans</u> with loved ones?

[IWER: Enter 997 if this was already done]

      _____ {Range: 0 to 100}
      997. Already Done
      998. DK
      999. RF

<V259>
V259_DiscussFinPlans
AD PURCHASE LONG TERM CARE INSURANCE V1
(If you knew you would develop Alzheimer's Disease {FL_FiveYrFuture},) how likely (where 0 means no chance and 100 means absolutely certain) would you be to purchase long-term care insurance?

(Long-term care insurance covers needs and services, such as home care, assisted living, adult daycare, respite care, hospice care, and nursing home care, which are not covered by health insurance, and only covered by Medicare or Medicaid in certain situations.)

[IWER: Enter 997 if this was already done]

    _____ {Range: 0 to 100}
    997. Already Done
    998. DK
    999. RF

{Ask if R is PARTNERED but not married (X065=3 or X065=4) - Otherwise skip to V261}
<V260>
V260_FinFuturePartner
PLANNING FINANCIAL FUTURE WITH PARTNER V1
Are you and your partner planning your financial future together as a couple?

    1. Yes → GO TO V261
    5. No → GO TO V262
    8. DK → GO TO V262
    9. RF → GO TO V262

{Ask V261_ if married (X065=1 or X065=2) or ask if V260_=1. Otherwise GO TO V262}
<V261>
V261_ TeachSPManageFin
TEACH SPOUSE OR SOMEONE ELSE TO MANAGE FINANCES V1
If you knew you would develop Alzheimer's Disease {FL_FiveYrFuture}, how likely (where 0 means no chance and 100 means absolutely certain) would you be to teach someone else, such as your {FL_husband/wife/partner}, how to manage your finances?

[IWER: Enter 997 if this was already done]

    _____ {Range: 0 to 100} → GO TO V276
    997. Already Done → GO TO V276
    998. DK → GO TO V276
    999. RF → GO TO V276

{Ask V262_ if R not married/partnered (X065=6) or if R partnered and not planning financial future with partner (V260 <> 1)}
<V262>
V262_TeachSPManageFin
TEACH SOMEONE ELSE TO MANAGE FINANCES V1
If you knew you would develop Alzheimer's Disease {FL_FiveYrFuture}, how likely (where 0 means no chance and 100 means absolutely certain) would you be to teach someone else how to manage your finances?

[IWER: Enter 997 if this was already done]

_____ {Range: 0 to 100} → GO TO V276
997. Already Done → GO TO V276
998. DK → GO TO V276
999. RF → GO TO V276

{Note: end of sequence based on X510_10Random1_2=1}

If **X510_10Random1_2**= 2 then Ask:
{Programmer note: V263-V272 are the same questions as V253 to V262, but here they are asked before V250-V252 if X510_10Random1_2**= 2** }

<V263>
V263_Attorney
AD CONSULT ATTORNEY V2
If you knew you would develop Alzheimer's Disease {FL_FiveYrFuture}, using a scale of 0-100 where 0 means no chance and 100 means absolutely certain, how likely would you be to consult an attorney about dealing with your personal affairs?

[IWER: Enter 997 if this was already done]

_____ {Range: 0 to 100}
997. Already Done
998. DK
999. RF

<V264>
V264_FinancialPOAs
AD POWER OF ATTORNEY V2
If you knew you would develop Alzheimer's Disease {FL_FiveYrFuture}, how likely (where 0 means no chance and 100 means absolutely certain) would you be to <u>set up a durable power of attorney</u> for someone to handle your financial affairs?

(A durable power of attorney allows you to name another person to make financial decisions on your behalf if you become too sick or unable to make your own decisions.)

[IWER: Enter 997 if this was already done]

_____ {Range: 0 to 100}
997. Already Done
998. DK
999. RF

<V265>
V265_AdvDirective
AD ADVANCE DIRECTIVE V2
If you knew you would develop Alzheimer's Disease {FL_FiveYrFuture}, how likely (where 0 means no chance and 100 means absolutely certain) would you be <u>to set up an advance directive or living will</u> to let family members and doctors understand how you wish your health care to be managed?

(An advance directive is a document that tells doctors and family members what kind of medical treatments you would like to have if you become too sick or unable to communicate your own health care decisions.)

[IWER: An advance directive is also known as a living will.]

[IWER: Enter 997 if this was already done]

_____ {Range: 0 to 100}
997. Already Done
998. DK
999. RF

<V266>
V266_WillUptoDate
AD UPDATE WILL V2
(If you knew you would develop Alzheimer's Disease {FL_FiveYrFuture},) how likely (where 0 means no chance and 100 means absolutely certain) would you be to make sure that your will is up to date?

[IWER: Enter 997 if this was already done]

_____ {Range: 0 to 100}
997. Already Done
998. DK
999. RF

<V267>
V267_HealthMedical
AD DISCUSS HEALTH PLANS V2
(If you knew you would develop Alzheimer's Disease {FL_FiveYrFuture},) how likely (where 0 means no chance and 100 means absolutely certain) would you be to discuss your health and medical plans with loved ones?

[IWER: Enter 997 if this was already done]

_____ {Range: 0 to 100}
997. Already Done
998. DK
999. RF

<V268>
V268_DiscussFinPlans
AD DISCUSS FINANCIAL PLANS V2
(If you knew you would develop Alzheimer's Disease {FL_FiveYrFuture},) how likely (where 0 means no chance and 100 means absolutely certain) would you be to discuss your financial plans with loved ones?

[IWER: Enter 997 if this was already done]

_____ {Range: 0 to 100}
997. Already Done
998. DK
999. RF

<V269>
V269_DiscussFinPlans
AD PURCHASE LONG TERM CARE INSURANCE V2
(If you knew you would develop Alzheimer's Disease {FL_FiveYrFuture},) how likely (where 0 means no chance and 100 means absolutely certain) would you be to purchase <u>long-term care insurance</u>?

(Long-term care insurance covers needs and services, such as home care, assisted living, adult daycare, respite care, hospice care, and nursing home care, which are not covered by health insurance, and only covered by Medicare or Medicaid in certain situations.)

[IWER: Enter 997 if this was already done]

      _____ {Range: 0 to 100}
    997. Already Done
    998. DK
    999. RF

{Ask if R is PARTNERED but not married (X065=3 or X065=4) – Otherwise skip to V271}
<V270>
V270_FinFuturePartner
PLANNING FINANCIAL FUTURE WITH PARTNER V2
Are you and your partner planning your financial future together as a couple?

    1. Yes → GO TO V271
    5. No → GO TO V272
    8. DK → GO TO V272
    9. RF → GO TO V272

{Ask V271_ if married (X065=1 or X065=2) or ask if V270_=1. Otherwise GO TO V272}
<V271>
V271_ TeachSPManageFin
TEACH SPOUSE OR SOMEONE ELSE TO MANAGE FINANCES V2
If you knew you would develop Alzheimer's Disease {FL_FiveYrFuture}, how likely (where 0 means no chance and 100 means absolutely certain) would you be to teach someone else, such as your {FL_husband/wife/partner}, how to manage your finances?

[IWER: Enter 997 if this was already done]

      _____ {Range: 0 to 100} → GO TO V273
    997. Already Done → GO TO V273
    998. DK → GO TO V273
    999. RF → GO TO V273

{Ask V272_ if R not married/partnered (X065=6) or if R partnered and not planning financial future with partner (V270 <> 1)}
<V272>
V272_TeachSPManageFin
TEACH SOMEONE ELSE TO MANAGE FINANCES V2
If you knew you would develop Alzheimer's Disease {FL_FiveYrFuture}, how likely (where 0 means no chance and 100 means absolutely certain) would you be to teach someone else how to manage your finances?

[IWER: Enter 997 if this was already done]

_____ {Range: 0 to 100}
997. Already Done
998. DK
999. RF

<V273>
V273_ADSelf2
CHANCES YOU WILL DEVELOP AD 2
Using a scale of 0-100 where 0 means no chance and 100 means absolutely certain, what are the chances that you will develop Alzheimer's Disease {FL_FiveYrFuture}?

_____ {Range: 0 to 100}
998. DK
999. RF

If R not married/partnered (X065=6), go to V275:
<V274>
V274_ADSpouse2
CHANCES YOUR SPOUSE/PARTNER WILL DEVELOP AD 2
What are the chances (using a scale of 0-100 where 0 means no chance and 100 means absolutely certain) that your {FL_husband/wife/partner} will develop Alzheimer's Disease {FL_FiveYrFuture}?

_____{Range: 0 to 100}
998. DK
999. RF

Final Version – Last modified 11/05/12

<V275>
V275_ADtest2
WANT AD TEST 2
If you could receive a test from your doctor, free of charge, that would definitely determine whether or not you would develop Alzheimer's Disease {FL_FiveYrFuture}, would you want to be tested?

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

<V276>
V276_WhoMostKnowledgeable
WHO MOST KNOWLEDGEABLE ABOUT FINANCES
Who is most knowledgeable about your family assets, debts and retirement planning?

1. R
2. R's spouse/partner
3. Both R and spouse/partner equally
4. Son
5. Son-in-law
6. Daughter
7. Daughter-in-law
8. Another relative or friend
9. Financial professional
10. Someone else {OTHER SPECIFY _____ {v277_}}
98. DK
99. RF
{If X065 = "OTHER" and answers V276=2 or V276=3, then hard error will appear with the following text "R reported earlier that she/he is not married or partnered. Please go back and change your answer."}

<V277>
V277_Specify
SPECIFY WHO MOST KNOWLEDGABLE ABOUT FINANCES
{Note: see above where V277_ is located}

{If V276 = 3 then ask V278}
<V278>
V278_OneMoreKnowledgeable
ONE SOMEWHAT MORE KNOWLEDGEABLE
Between you and your {Fill_husband/wife/partner}, is one of you <u>somewhat</u> more knowledgeable about your family's assets, debts, and retirement planning?

1. Yes
5. No→GO TO V280
8. DK→GO TO V280
9. RF→GO TO V280

{If V278 = 1 then ask V279}
<V279>
V279_RorSpPtMoreKnowledgeable
R OR SPOUSE/PARTNER MORE KNOWLEDGEABLE
Who is somewhat more knowledgeable about your family's assets, debts, and retirement planning?

1. R
2. R's spouse/partner
8. DK
9. RF

<V280>
V280_WhoDealswithFinances
WHO DEALS MOST WITH FINANCES
Who deals most with day-to-day finances, like paying the bills?

1. R
2. R's spouse/partner
3. Both R and spouse/partner equally
4. Son
5. Son-in-law
6. Daughter
7. Daughter-in-law
8. Another relative or friend
9. Financial professional
10. Someone else {OTHER SPECIFY _____ {v281_}
98. DK
99. RF

{If X065 = "OTHER" and answers V280=2 or V280=3, then hard error will appear with the following text "R reported earlier that she/he is not married or partnered. Please go back and change your answer."}

<V281>
V281_Specify
SPECIFY WHO DEALS MOST WITH FINANCES
{Note: see above where V281_ is located}

<V282>
V282_HealthcareInsDecisions
WHO DEALS MOST WITH HEALTHCARE AND INSUR
Who deals most with healthcare and insurance decisions?

1. R
2. R's spouse/partner
3. Both R and R's spouse/partner equally
4. Son
5. Son-in-law
6. Daughter
7. Daughter-in-law
8. Another relative or friend
9. Financial professional
10. Someone else {OTHER SPECIFY _____ {v283_}
98. DK
99. RF

{If X065 = "OTHER" and answers V282=2 or V282=3, then hard error will appear with the following text "R reported earlier that she/he is not married or partnered. Please go back and change your answer."}

<V283>
V283_Specify
SPECIFY WHO DEALS MOST WITH HEALTHCARE DECISIONS
{Note: see above where V283_ is located}

END OF MODULE 6