

Health and Retirement Study

2017 Fall Life History Mail Survey (LHMS)

Residential History State Level Data

Version 1.0, March 2022

Data Description

To the Restricted Data Investigator: This restricted data set is intended for exclusive use by you and the persons specified in the Agreement for Use of Restricted Data from the Health and Retirement Study and/or the Supplemental Agreement with Research Staff for Use of Restricted Data from the Health and Retirement Study. If there are any questions about this data set and its use, refer to the restricted data pages on the HRS Web site (<https://hrs.isr.umich.edu/data-products/restricted-data>). You can also contact the HRS RDA Help Desk via electronic mail (<mailto:hrsdaapplication@umich.edu>) .

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Conditions of Use

By registering for access to HRS Public Release data, the User agrees to all of the following:

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- Not to transfer HRS Public Release data to any third party other than staff or students for whom you are directly responsible except as indicated below.
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- To certify the destruction of any downloaded Public Release data file as well as any data files derived from the downloaded file when requested to do so by the Health and Retirement Study.
- To include the following citation in any research reports, papers, or publications based on Public Release data:

In text:

"The HRS (Health and Retirement Study) is sponsored by the National Institute on Aging (grant number NIA U01AG009740) and is conducted by the University of Michigan."

In references:

"Health and Retirement Study, ([insert Product Name]) public use dataset. Produced and distributed by the University of Michigan with funding from the National Institute on Aging (grant number NIA U01AG009740). Ann Arbor, MI, (year)."

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"This analysis uses Early Release data from the Health and Retirement Study, ([insert Product Name]), sponsored by the National Institute on Aging (grant number NIA U01AG009740) and conducted by the University of Michigan. These data have not been cleaned and may contain errors that will be corrected in the Final Public Release version of the dataset."

- Please note that although it is necessary to include the above citations to the HRS in any publications, it is not necessary to associate your publications with the HRS grant in [PubMed](#).
- Provide information regarding any research product (dissertation, thesis, journal article, book, book chapter, report, etc.) based on data obtained from the Health and Retirement Study by sending an electronic copy to hrrpublications@umich.edu.
- Report immediately to the Health and Retirement Study at hrrquestions@umich.edu any disclosure of study participant identity as well as any discovery of flaws or errors in the data or documentation files.

Notify the Health and Retirement Study through use of the update function provided at this site or by electronic mail directed to hrrquestions@umich.edu of changes in your electronic mail address, postal address, telephone number, organizational affiliation or organizational status.

1. Introduction

The Life History Mail Survey 2017 Fall (LHMS 2017 Fall) contains questions about residential, education, employment and health history, and other important childhood and family events. The LHMS 2017 Fall follows the LHMS 2015 released in June 2017, and the LHMS 2017 Spring released in August 2018.

The LHMS is part of the Health and Retirement Study (HRS), which is funded under a cooperative agreement between the National Institute on Aging (NIA) and the Survey Research Center at the University of Michigan. The HRS is designed to study labor force, health, and family transitions of the U.S. population aged 51 and older, and the impact of those transitions on economic resources, claims on structured programs such as Social Security, Medicare, and Medicaid, and informal assistance and transfers to and from family members.

The National Institute on Aging (NIA) provided funding (R01 AG051142) for the LHMS 2017 Fall, which was conducted by the Survey Research Center (SRC), at the Institute for Social Research (ISR), at the University of Michigan.

By receiving the dataset, you agree to use it for research and statistical purposes only and make no effort to identify respondents. In addition, you agree to send us a copy of publications you produce based on the data. See Registration and Downloading the Data (at the end of this document) for additional details.

The questions in the LHMS are based on several similar studies around the world, including: the English Longitudinal Study of Aging (ELSA, England), the Survey of Health, Ageing and Retirement in Europe (SHARELIFE), and the China Health and Retirement Longitudinal Study (CHARLS).

The restricted data include the actual state indicators for the residential histories whereas the public release LHMS 2017 Fall state data includes an enumeration of state residence.

2. LHMS Sample Design

In 2015, all but a subsample of Spanish-speaking HRS respondents were assigned to receive one of two mail surveys: Consumption and Activities Mail Survey (CAMS) or Life History Mail Survey (LHMS). CAMS is a longitudinal sample that receives CAMS (and usually only CAMS) in every odd numbered year. The sample selection for CAMS is household based and covers about 40% of HRS households. That left about 60% of households for the 2015 LHMS.

HRS had not planned to administer the LHMS until 2017, but an opportunity arose to administer a preliminary version of the LHMS in 2015. The 2015 LHMS questionnaire included only part of the content and is referred to as Part 1. In addition, the 2015 LHMS questionnaire was only administered to English-speaking respondents.

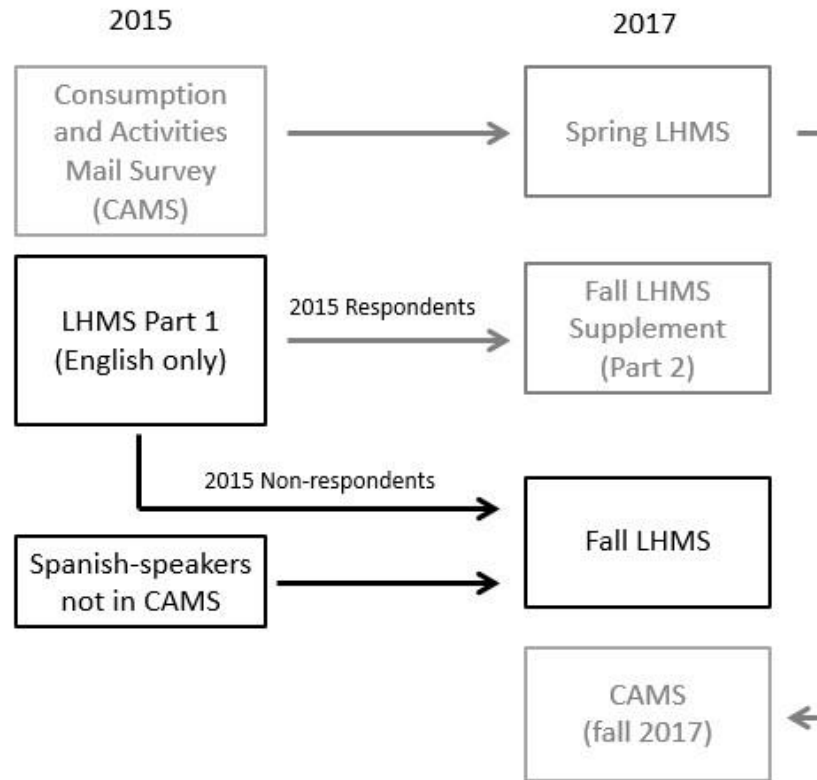
In order to incorporate the CAMS sample into the LHMS but not interrupt the fall CAMS cycle, HRS administered the LHMS to respondents in the CAMS sample in spring 2017. The sample included all individuals who were in the CAMS sample in 2015 (regardless of their response outcome and including both English and Spanish speakers) plus any new spouses/partners that they reported in the 2016 core interview. They received the full version of the LHMS (Parts 1 and 2) as a single questionnaire. One complexity is that, because 2016 was a new cohort recruitment year, interviewing for some panel and many new cohort cases continued well into 2017. As a result, CAMS sample members who had not completed their 2016 core interview by early March 2017 were excluded from the 2017 LHMS. The CAMS sample then received the CAMS survey as scheduled in fall 2017.

Sample members who responded to the 2015 LHMS were sent Part 2 of the LHMS in fall 2017 (Fall-Supplement), whereas those who were in the 2015 LHMS sample but did not respond were sent the full version of the 2017 LHMS (Fall). As with CAMS, new spouses/partners of 2015 LHMS sample members were also included in the 2017 Fall LHMS sample. Finally, Spanish-speaking respondents who were excluded from the 2015 LHMS (plus any new spouses/partners) received the full LHMS in Fall 2017.

When the three subsamples from 2017 are combined, the sample essentially covers all HRS participants who were in the sample in 2016 and were still living in 2017. The only exceptions are the 2016 new cohort (LBBs) and a small number of CAMS sample members who had not completed their 2016 core interview by March 2017. (Both of these excluded groups received the LHMS in 2019.)

Table 1 below depicts the 2015 and 2017 LHMS sample design with emphasis on LHMS 2017 Fall

Life History Mail Survey Sample Design: 2015 and 2017



The field period for the LHMS 2017 Fall was December 2017 through June 2018. Questionnaires were mailed to a subsample of HRS respondents (n= 5,180). The data file contains 7 variables and data for 1,444 respondents. The response rate is 28% percent.

About the LHMS Geographic Data

3. Variable Names and Labels

Variable names begin with the letters LH to designate the Life History Mail Survey, followed by the question number and _17F to indicate the study wave. The variables available in the data file are listed in the table below.

VarNum	Name	TYPE	Label
1	HHID	CHAR	HOUSEHOLD IDENTIFICATION NUMBER
2	PN	CHAR	RESPONDENT PERSON IDENTIFICATION NUMBER
3	LH5_ENTRYNUM_17F	CHAR	ROW NUMBER OF DATA ENTERED BY R ON Q5
4	LH5_STARTYR_17F	NUM	RESIDENCE START YEAR
5	LH5_ENDYR_17F	NUM	RESIDENCE END YEAR
6	LH5_STATE_17F	CHAR	RESIDENCE STATE
7	LH5_STATEFIPS_17F	NUM	NUMERIC U.S. FEDERAL INFORMATION PROCESSING STANDARDS (FIPS) CODE

LH5_EntryNum_17F - ROW NUMBER OF DATA ENTERED BY R Q5

As shown in the example, the variable label contains the question number found in the 2017 Fall LHMS questionnaire. Unlike LHMS 2017 Fall public data, these records are stacked. Use the values in LH5_EntryNum_17F to determine which row of Table 5 (see below) the respondent recorded values.

Q5 In this table, please fill in as much information as you can about **all the places that you have lived for one year or more** from when you were born until **now**.
To begin, please enter the year of your birth and the place where you lived when you were born. Beginning in #2, write the **next** place where you lived for a year or more, and so on. If you can't remember the exact year(s), please estimate the year to the best of your ability. If you lived outside the U.S., write the country name instead of the state. **Use one line for each new place (see example p. 2).**

TABLE COLUMNS SPAN ACROSS BOTH PAGES. ►

#	Start Year	Street (Number and Street)	City/Town	State (or Country)
1	1939			
2	1949			
3	1952			
4				

3a. Data Quality

Due to the skip patterns in this questionnaire, all missing answers are treated the same in the dataset and coded as simply "Answer not given/Missing." This is true whether the respondent was "expected" to answer the question or not, based on earlier responses. In cases where the respondent recorded ditto marks, and provided a start year, the last observation was carried forward.

While cleaning the data, when extreme, unlikely or conflicting values were encountered, electronic images of the questionnaires were checked directly to determine if errors were introduced during the data entry/scanning process. This includes instances where a start year is greater than an end year, or a start age is greater than an end age. If the respondent reported the extreme or conflicting value, the value appears unchanged in the data.

State FIPS is included to assist researchers, it was not entered by the respondents.

3b. LH5 Series, Residential History - Start and End Years

For this question, respondents were instructed to write the start year for each of their residences before age 50, and to write their age or the decade if they could not remember the exact year. The data for the LH5_StartYr_17F – Residence Start Year and LH5_EndYr_17F – Residence End Year series therefore contains a mix of ages and years on some lines, as seen in the example above. Some respondents recorded consecutive years on each line and the same residence i.e., city and state

names, the values appear unchanged in the data.

3c. LH5 Series, Residential History - State

Missing state values were imputed following a correction scheme:

1. A valid zip code was provided
2. Review other fields in tables for state information
3. Examine scanned questionnaire

State code 'ZZ' denotes a foreign country and/or such responses as "Pacific theatre WWII" and "Overseas".

3d. Data Quality

Due to the skip patterns in this questionnaire, all missing answers are treated the same in the dataset and coded as simply "Answer not given/Missing." This is true whether the respondent was "expected" to answer the question or not, based on earlier responses.

While cleaning the data, when extreme, unlikely or conflicting values were encountered, electronic images of the questionnaires were checked directly to determine if errors were introduced during the data entry/scanning process. This includes instances where a start year is greater than an end year, or a start age is greater than an end age. If the respondent reported the extreme or conflicting value, the value appears unchanged in the data.

Records in the data files are sorted in order by the identifying variables from the HRS core study, HHID (household ID) and PN (person number). The variable PN refers to the respondent to whom the questionnaire was mailed. Identification variables in the LHMS 2017 Fall Final Release (Version 1) are stored in character format. For further information about HRS identification variables and merging data, see the [Data Description for the HRS 2002 Core](#).

4. File Structure

The 2017 Fall LHMS Residential History State Level Data (Version 1.0) data are at the state level. State-level files contain questions that were asked of all respondents about themselves (or were answered by a proxy for the respondent if the respondent was not able to fill out the questionnaire). The data file contains multiples records for each respondent or proxy (n= 1,277) who filled out and returned a 2017 LHMS questionnaire with valid residential history values.

The data file is called LHMS17F_STATE_RES HIST, loosely translated as: Life History Mail Survey 2017 Fall, State Residential History.

The primary identification variables (IDs) are:

HHID	HOUSEHOLD IDENTIFIER
PN	PERSON NUMBER

These data will need to be transposed before merging these data with and publicly available HRS product. To align these data with LHMS17 records, use LH5_EntryNum_17F to guide the

reshaping from long to wide.

Records in the data files are sorted in order by HHID and PN and LH5_EntryNum_17F. The variable PN refers to the respondent to whom the questionnaire was mailed. Identification variables in the HRS 2017 Fall LHMS Geographic State Level (Version 1.0) are stored in character format. For further information about HRS identification variables and merging data, see the Tracker Data Description and the Data Descriptions for each HRS Core wave.

Unlike 2015, respondents were not asked to record an end date (year). A LH5_EndYear_17F is the start year of the following entry. This was done for sake of continuity between waves.

5. Linking Respondents Across Time

Respondent records in the 2017 Fall LHMS Residential History State Level Data (Version 1.0) can be linked to respondent records from prior waves by HHID and PN. The core sub-household identifiers can be used to link household data with the cross-sectional respondent level data.

6. Registration and Downloading the Data

6a. Registration

HRS data are available for free to researchers and analysts at the HRS Web site. In order to obtain public release data, you must first register at our Web site. Once you have completed the registration process, your username and password will be sent to you via e-mail. Your username and password are required to download data files.

Registered users receive user support, information related to errors in the data, future releases, workshops, and publication lists. The information you provide will not be used for any commercial use, and will not be redistributed to third parties.

6b. Conditions of Use

By registering, you agree to the [Conditions of Use](#) governing access to Health and Retirement public release data.

6c. Publications Based on Data

As part of the data registration process, you agree to include specified citations and to inform HRS of any papers, publications, or presentations based on HRS data. Please send a copy of such publications in PDF format via e-mail to hrrpublications@umich.edu with "Attn: Papers and Publications" in the subject line. If you wish, you may include a bibliographical reference.

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Alternately, you may contact us by e-mail at hqsquestions@umich.edu with "Attn: Papers and Publications" in the subject line.

7. If You Need to Know More

This document is intended to serve as a brief overview and to provide guidelines to using the 2017 Fall LHMS Residential History State Level Data (Version 1.0) dataset. Additional information about the HRS can be obtained from the HRS Web site. If you have questions or concerns that are not adequately covered here or on our Web site, please contact us. We will do our best to provide answers.

8a. HRS Internet Site

Health and Retirement Study public release data and additional information about the study are available on the Internet. To access the data and other relevant information, point your Web browser to the HRS Web site.

<http://hrsonline.isr.umich.edu/>

8b. Contact Information

If you need to contact us, you may do so by one of the methods listed below.

Internet: Help Desk at our Web site

E-mail: hqsquestions@umich.edu

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