SpecWriter Data

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This is the cover page. Additional contents currently project specific.

AgeCategories   **(GL1005)**   **Item Type:** Route   **Type Class:** If Then

Route Details: **Age Categories (AGE RANGE and AGE GUESS):**
1=less than 1 year
2=1-4
3=5-15
4=16-23
5=24-34
6=35-44
7=45-54
8=55-64
9=65 years or older

AgeCalculation   **(GL1010)**   **Item Type:** Route   **Type Class:** If Then

Route Details: **Age Calculation:**

The preference for calculating age is as follows:

In general, use the data from the current round to calculate or use the NHIS/preload data if age not yet updated/collected in RE.

1. Calculate age based on DOB and RU reference end start date.

2. If DOB is missing day, but month and year are available, calculate age based on DOB and RU reference period end date using '1' as the day field for DOB.

3. If DOB is missing month (and/or day), but year is available, calculate age based on DOB year and RU reference period end date. If RU reference period end date is June 30 or earlier, round age down. If RU reference period end date is July 1 or later, round age up. For example, DOB YYYY is 1998 and RU reference period end date is Feb. 14, 2016, calculated age is 17. If DOB YYYY is 1998 and RU reference period end date is Sep. 14, 2016, calculated age is 18. (These are the rules they use in imputation. If we think this is too complicated to follow in CAPI - we could just use the straight RU reference period end year minus DOB year to get the age.)

4. If DOB is missing YEAR, use the age in the AGE variable field (include item RE680_ 05)

5. If DOB and AGE variables are missing, use the age category at the AGE RANGE field (includes items RE660, RE680_06, RE690, RE760).

6. If DOB, AGE, and AGE RANGE are all missing, use the age category at the AGE GUESS field (includes items RE670, RE680_07, RE700, and RE770).

AgeOrder   **(GL1015)**   **Item Type:** Route   **Type Class:** If Then

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Route Details: **Ordering RU Members Based on Age:**

When ordering by age, first determine if the respondent should be listed first. If so, list the respondent first and then order list by age, if required.

1. List RU members with a calculated age of 65 or older in descending order. If 2 or more RU members have the same calculated age, display the RU member with the lowest PID first.

2. Then, list all RU members with calculated age group of age category 9. If 2 or more RU members have the same calculated age category, display the RU member with the lowest PID first.

3. Then, list RU members with a calculated age of 55 through 64 in descending order. If 2 or more RU members have the same calculated age, display the RU member with the lowest PID first.

4. Then, list all RU members with calculated age group of age category 8. If 2 or more RU members have the same calculated age, display the RU member with the lowest PID first.

5. Then, list RU members with a calculated age of 45 through 54 in descending order. If 2 or more RU members have the same calculated age category, display the RU member with the lowest PID first.

6. Then, list all RU members with calculated age group of age category 7. If 2 or more RU members have the same calculated age category, display the RU member with the lowest PID first.

7. Then, list RU members with a calculated age of 35 through 44 in descending order. If 2 or more RU members have the same calculated age, display the RU member with the lowest PID first.

8. Then, list all RU members with calculated age group of age category 6. If 2 or more RU members have the same calculated age category, display the RU member with the lowest PID first.

9. Then, list RU members with a calculated age of 24 through 34 in descending order. If 2 or more RU members have the same calculated age, display the RU member with the lowest PID first.

10. Then, list all RU members with calculated age group of age category 5. If 2 or more RU members have the same calculated age category, display the RU member with the lowest PID first.

11. Then, list RU members with a calculated age of 16 through 23 in descending order. If 2 or more RU members have the same calculated age, display the RU member with the lowest PID first.

12. Then, list all RU members with calculated age group of age category 4. If 2 or more RU members have the same calculated age category, display the RU member with the lowest PID first.

13. Then, list RU members with a calculated age of 5 through 15 in descending order. If 2 or more RU members have the same calculated age, display the RU member with the lowest

PID first.

14. Then, list all RU members with calculated age group of age category 3. If 2 or more RU members have the same calculated age category, display the RU member with the lowest PID first.

15. Then, list RU members with a calculated age of 1 through 4 in descending order. If 2 or more RU members have the same calculated age, display the RU member with the lowest PID first.

16. Then, list all RU members with calculated age group of age category 2. If 2 or more RU members have the same calculated age category, display the RU member with the lowest PID first.

17. Then, list RU members with a calculated age of 0. If 2 or more RU members have the same calculated age, display the RU member with the lowest PID first.

18. Then, list all RU members with calculated age group of age category 1. If 2 or more RU members have the same calculated age category, display the RU member with the lowest PID first.

PersonRoster   **(GL1020)**   **Item Type:** Route   **Type Class:** If Then

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Route Details: **Default Person Roster**

Within RE, after passing RE40_07 **for the first time**:

At top of list, display RU member respondent or reference person if respondent is a proxy:

• If current respondent is an RU member (ST.Respondent=RespRUMem) display person set as RespondentPersID for the current interviewing session.
• If current respondent is a proxy (ST.Respondent=RespProxy) and ST60 is set to any value, then list the reference person identified in the preload (REFPERS or NREFPERS)

Continue listing in ascending PID order. This is the default order of the person roster throughout the RE section. This order will not change, even if the respondent, reference person, or proxy changes within the RE section or during a subsequent session of ST or RE.

Immediately after RE is completed for the first time:

At top of list, display RU member respondent or reference person if respondent is a proxy:

• If current respondent is an RU member (ST.Respondent=RespRUMem), display person set as RespID during the interviewing session when RE was first completed
• If current respondent is a proxy (ST.Respondent=RespProxy) and ST60 is set to any value, then display reference person at top of list:
• If both RE490 and RE500 were not asked, then list reference person identified in preload (REFPERS or NREFPERS)
• If RE490 ≥1, then list person selected at RE490;
• If RE490=0 or not asked, then list the person selected at RE500

Continue listing in ascending PID order. This is the default order of the person roster throughout the remaining CAPI interview. This order will not change, even if the respondent or proxy changes during a subsequent session of ST. For example, if the respondent changes after RE has been completed, the original PID identified as the respondent or reference person if originally had a proxy respondent is retained.

RFDKEntry   **(GL1025)**   **Item Type:** Route   **Type Class:** If Then

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Route Details: **Function of Refused and Don't Know Entries:**

The item level specifications indicate when Refused and Don't Know values are allowed. In CAPI, Don't Know is entered using the F5 function key and Refused is entered using the F6 function key. These responses are part of the "Answer Menu". The Answer Menu also shows these functions as black when allowed and grayed out when not allowed.

When F5 (don't know) is entered for a response for an entry field, the answer appears as an question mark in the form pane. When F6 (refused) is entered for a response for an entry field, the answer appears as an exclamation point in the form pane.

The choices "Refused" and "Don't Know" never show in the answer list pane unless explicitly indicated at the item level.

MissingValues   **(GL1030)**   **Item Type:** Route   **Type Class:** If Then

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Route Details: **Display of Missing Values:**

Question text:
• If the value supplying the required fill for part of a question text has a coded missing value ("RF", "DK"), display either "Refused" or "Don't Know" as appropriate.

Form Pane:
• If the item requires a display of NHIS or prior round data that can be edited and that value is "RF" or "DK, display the entry field as EMPTY. Interviewer will be required to enter another response, even if that response is RF or DK again.
• If the item requires the display of current round data in the form pane, display the symbol for RF or DK as appropriate. The interviewer would not be require to reenter the missing value.

AutoCode   **(GL1035)**   **Item Type:** Route   **Type Class:** If Then

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Route Details: **Use of Auto Code:**

There are three ways auto code can be applied:

1. The item being "auto coded" is set behind the scenes, that item is skipped in CAPI, and the form pane shows the item as empty (that is, it looks like was never asked). Unless otherwise specified, this is the default method for "auto code."

2. The item being "auto coded" is set behind the scenes, that item is skipped in CAPI, and the form pane shows the "auto coded value" for that entry, but that value is **not** editable.

3. The item being "auto coded" is set behind the scenes; that item is skipped in CAPI, and the form pane shows the "auto coded value" for that entry, and that value **is editable**.

KeystrokeShortc   **(GL1040)**   **Item Type:** Route   **Type Class:** If Then

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Route Details: **Keystroke Shortcut Definitions:**

F1: Access help text
F2: Access Review/Add – off path
F3: English/Spanish toggle
F5: Record a don't know response
F6: Record a refused response
F7: Access English show card
F8: Access eHHCS
F9: Make a comment

CTRL-A: Add an entry
CTRL-E: Edit an entry
CTRL-D: Delete an entry (used on rosters and date picker)
CTRL-R: Access the recurrence feature (in date picker)
CTRL-S: Switch To
CTRL-C: Cancel out of off-path
CTRL-X: View relationship grid when the number of RU members displayed is >=7
CTRL-Z: Calculator

ALT-F10: Break-off
ALT-F4: Close help pop-up box

FormPane   **(GL1045)**   **Item Type:** Route   **Type Class:** If Then

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Route Details: **General Form Pane Rules:**

1. There should be form pane break at the beginning of every section.
2. The form pane should avoid all use of scrolling unless it is absolutely necessary for a grid display.
3. Grid displays.
   - Always use a new form pane for a grid.
   - When a grid is forced navigation, do not include other items as part of that form pane.
   - When a grid is flexible navigation, include only the grid and the DONE item as part of that form pane.
   - For a grid display, allow for vertical scrolling only when the room is needed for the info pane and answer list pane. Otherwise, adjust the size of the info pane and answer list pane to allow for more room in the form pane.
   - For a grid display, allow for horizontal scrolling only when the grid includes too many individual items to display without scrolling
3. Full address collection should occur on a single form pane and then go to a new form pane.
4. When possible, avoid having a single item as its own form pane.
5. When possible, the first item of a loop should always start on it's own form pane.

GlobalFills   **(GL1050)**   **Item Type:** Route   **Type Class:** If Then

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Route Details: **Global Fills:**

Pronouns:

{you/he/she}
{you/him/her}
{your/his/her}
{I/he/she}
{my/his/her}
{yourself/himself/ herself}

• CAPI displays "you," "your," "I," or "my" if the person in question is the respondent.
• If current respondent is an RU member (ST.Respondent=RespRUMem), the respondent is the person set in the RespondentPersID (or RespID) field for the current interviewing session. If current respondent is a proxy (ST.Respondent=RespProxy), always display the full name of the person being asked about.
• CAPI displays "he," "him" or "his" if the person in question is not the respondent and coded as male.
• CAPI displays "she" or "her" if the person in question is not the respondent and coded as female or if gender is missing.
• Gender is selected at RE60, RE650_01, RE680_01, or RE720 (1=Male) (2, RF, DK=Female).

Verb Tense:

{were/was}
{make/makes}
{are/is}
{visit/visits}
{do/does}
{have/has}
{need/needs}
{go/goes}
{purchase/purchases}
{receive/receives}
{belong/belongs}

• Verb choices agreeing with the subject are provided as necessary and are embedded at applicable questions.
• In the question text, the first verb option is displayed when the person in question is the respondent. The second verb option is displayed when the person in question is not selected as the respondent.
• If current respondent is an RU member (ST.Respondent=RespRUMem), the respondent is the person set in the RespondentPersID (or RespID) field for the current interviewing session. If current respondent is a proxy (ST.Respondent=RespProxy), always display the full name of the person being asked about.
• In the examples to the left, display "were," if the person in question is the respondent. Otherwise, display "was." Display "make" if the person in question is the respondent. Otherwise, display "makes." Display "are" if the person in question is the respondent. Otherwise, display "is." Display "visit" if the person in question is the respondent. Otherwise, display "visits."

<u>**ContextHeaders**</u>   <u>**(GL1055)**</u>   **Item Type:** Route   **Type Class:** If Then

Route Details: Refer to specifications in the excel spreadsheet for context headers at the item level in CAPI:

Group 1 Context Header Specifications:

<<https://mepspm.westat.com/FinalDesignDocsbyGroup/Context%20Headers/Context%20header%20specifications_Grp1_3_25_16.xlsx>>

Group 2 Context Header Specifications:

<<https://mepspm.westat.com/FinalDesignDocsbyGroup/Context%20Headers/Context%20header%20specifications_Grp2_042116.xlsx>>

Group 3A Context Header Specifications:

https://mepspm.westat.com/FinalDesignDocsbyGroup/Context%20Headers/Context%20Header%20Specifications%20Gr3A_1_5_17.xlsx

Group 3B Context Header Specifications:

https://mepspm.westat.com/FinalDesignDocsbyGroup/Context%20Headers/Context%20header%20specifications_Grp3B_12_1_16.xlsx

Group 4 Context Header Specifications:

https://mepspm.westat.com/FinalDesignDocsbyGroup/Context%20Headers/Context%20header%20spec%20for%20Group%204_01032017.xlsx

All context headers should display in the following manner:

1. Display as 1 line of text only
2. Text Color: Royal Blue.
3. Font Style and Size: Arial, 13 px; mixed case.

Additional instructions:

1. Display text for the context header is specified at the item level (in the excel spreadsheet)
2. Note that the callouts in the hard copy specifications for the context header is often different from the callout for the same information in the question text. For example, the context header callout is "{PERSON'S FIRST MIDDLE AND LAST NAME}" but the question text callout is "{PERSON}". Often the variable used for the display in both the context header and the question text is the same.
3. Please refer to the spreadsheet for specific instructions on how to display the fill within in the context header vs. the question text as they are not always displayed the same. For example, a date in the context header may be displayed as "Jan 15", but in the question text it will be displayed as "January 15, 2017"

CtrlCurrHere   **(GL1065)**   **Item Type:** Route   **Type Class:** If Then

Route Details: **Person-Level Control Variable – Currently-Here:**

Variable: CtrlCurrHere

Label: Currently-Here

Values: YES, NO

Definition: The specification for CtrlCurrHere and CtrlPersEligible were combined into a single document. Variable set and used only in the ST, RE-A, RE-B Sections.

At the start of Round 1 it is assumed that everyone sampled at NHIS is eligible and currently here. In the course of ST and RE, some people leave the RU. People who leave the RU but who are interviewed as part of the RU for the time they are here are still considered eligible and currently-here (they have partial eligibility and are considered currently here even if their partial eligibility is not on the interview date). Currently here is a value that represents a person status in that RU, not necessarily in the DU. Movers that are followed to their new RU are considered eligible but not currently here for this RU – but will have a currently here value of YES in their new RU.

Link to file with logic for setting this variable:
https://mepspm.westat.com/FinalDesignDocsbyGroup/Control%20Variables/CtrlPersEligible_CtrlCurrHere_CurrentVersion.docx

<u>**CtrlPersEligible**</u>   <u>**(GL1075)**</u>   **Item Type:** Route   **Type Class:** If Then

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Route Details: **Person-Level Control Variable – Eligibility:**

Variable: CtrlPersEligible

Label: Eligibility

Values: YES; NO

Definition: Variable set and used only in the ST, RE-A, RE-B Sections. The specification for CtrlCurrHere and CtrlPersEligible were combined into a single document.

At the start of Round 1 it is assumed that everyone sampled at NHIS is eligible and currently here. In the course of ST and RE, some people leave the RU. People who leave the RU but who are interviewed as part of the RU for the time they are here are still considered eligible and currently-here (they have partial eligibility and are considered currently here even if their partial eligibility is not on the interview date). Currently here is a value that represents a person status in that RU, not necessarily in the DU. Movers that are followed to their new RU are considered eligible but not currently here for this RU – but will have a currently here value of YES in their new RU.

A person's eligibility is based on his or her keyness AND living arrangement. To be eligible for inclusion, a person must be part of the U.S. civilian, non-institutionalized population and be designated as key, or reside with an eligible, key RU member. If an RU member is eligible for only part of the round, you will collect information for the period of time he or she was eligible.

Basic rules for eligibility:
- Everybody who is a member of an RU with at least one key, in scope member is eligible for data collection, regardless of military status.
- Anybody who is (non-key or in the military) AND (no longer a member of an RU with at least one key, in scope person) is not eligible for data collection

Technical Notes:

1. If an existing household member (key in R1), joins the military in R2 (or later), but still lives in the same household with other key, civilian members – the military person is still eligible for data collection in the round. Though for data delivery, this military person is considered out-of-scope.
2. If an existing household member (key in R1), joins the military in R2 (or later) and moves onto a military base or a private residence with his (civilian) wife (also key in R1) – the military person is still eligible for data collection in the round. Though for data delivery, this military person is considered out-of-scope.
3. If an existing household member (key in R1), joins the military in R2 (or later) and moves onto a military base OR another private residence by himself – this military person has partial eligibility in this RU for data collection until the date he joins the military. And for data delivery, this military person is considered out-of-scope
4. If a FT military person joins an existing MEPS (civilian) RU (in R1 or any round), this person is eligible for data collection in the round. And for data delivery, this military person is considered out-of-scope.

Link to file with logic for setting this variable:
https://mepspm.westat.com/FinalDesignDocsbyGroup/Control%20Variables/CtrlPersEligible_CtrlCurrHere_CurrentVersion.docx

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CtrlPersKey   **(GL1080)**   **Item Type:** Route   **Type Class:** If Then

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Route Details: **Person-Level Control Variable – Keyness:**

Variable: CtrlPersKey

Label: Keyness

Values: YES, NO

Definition: Variable set and used only in the ST, RE-A, RE-B Sections.

Key persons are those who were included in the NHIS and were living in the civilian, non-institutionalized population in the U.S. Members of the Armed Forces on full-time active duty who reside with another key non-military person are also defined as key. Non-key persons are defined as persons who were not living in the original sampled DU at the time of the NHIS interview BUT did have a chance to participate. In other words, they were living elsewhere in a civilian, non-institutionalized household that was not selected for the NHIS.

Link to file with logic for setting this variable:
https://mepspm.westat.com/FinalDesignDocsbyGroup/Control%20Variables/CtrlPersKey_CurrentVersion.docx

CtrlSampNHIS   **(GL1085)**   **Item Type:** Route   **Type Class:** If Then

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Route Details: **Person-Level Control Variable – Sampleable at NHIS:**

Variable: CtrlSampNHIS

Label: Sampleable-at-NHIS

Values: SAMPLEABLE BY NHIS, NOT SELECTED (old YES); NOT SAMPLEABLE BY NHIS (old No); SELECTED BY NHIS (old NO, SELECTED)

Definition: Variable set and used only in the ST, RE-A, RE-B Sections.

A person sampleable-at-NHIS is a person who had a chance of selection when the NHIS sample was drawn, but was, in fact, not selected.

Examples of persons NOT sampleable-at-NHIS are persons living in an institution at the NHIS sample date.

Persons who are here-at-start-of-round in round 1 are initialized to "Selected with NHIS".

In Round 1 we assess whether a person is sampleable-at-NHIS or not based on the real NHIS interview date.

In Rounds 2-5, this is assessed using January 1, {YEAR} where "YEAR" is the first round of the panel. It has been like this since Panel 1 and was done to use a more salient date for rounds 2-5.

Due to the mutual exclusivity of the loops, there is no need for a local version of it. It is not used for routing or display filters.

Link to file with logic for setting this variable:
https://mepspm.westat.com/FinalDesignDocsbyGroup/Control%20Variables/CtrlSampNHIS_CurrentVersion.docx

CtrlTrackSumm   **(GL1090)**   **Item Type:** Route   **Type Class:** If Then

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Route Details: **Person-Level Control Variable – Status (Track Sum):**

Variable: CtrlTrackSumm

Label: Status

Values: 1-17

Definition: Variable set and used only in the ST, RE-A, RE-B Sections.

Status indicates the state of the persons who left the RU, but these persons may or may not be considered by CAPI as having left the RU and may or may not still be interviewed as part of the RU.

- People residing outside the US (Student, Non-Military, Military) and full-time military living alone will be carried on the DU roster as ineligible for the subsequent round. However, they can rejoin the RU roster if 1) they become eligible in a successive round and 2) they are living in the RU at the time of the subsequent round interview. Persons with any period of eligibility in the current round in the current RU may be interviewed as part of the current RU for the period they resided in the RU.
- Non-military persons who have moved in the US to either a military facility or a private residence, may be interviewed in the new RUs, depending on their eligibility.
- Military persons, who have moved in the US to a private residence or a military facility with other key, civilian RU members, may be interviewed in the new RUs, depending on their eligibility.
- Deceased persons go out-of-scope AND are removed from the RU Roster after the current round.
- Institutionalized persons are NOT removed from the RU Roster.
- Persons who live away at school in grades 1-12 and persons who are institutionalized for a period of 100 days or less, remain as current RU members.

Persons identified as unrelated to the reference person will become a separate RU and processed as a split for refielding if they are key. Otherwise, this person will not be followed and will not remain in the parent RU (i.e., will be permanently removed similar to deceased).

Definitions for related flags – PriorRndInelig and InstAtTimeOfPrevint are also included in the Track Summ spec.

Definition of PriorRndInelig flag: Individuals who have partial eligibility only at the beginning of a round (e.g., a person moves out of the country after the reference period start date) becomes ineligible in the following round. Because those individuals have partial eligibility, they are considered currently here and eligible during that round of data collection. However, during inter-round processing, those individuals need to be set as not currently here and ineligible for the following round. These individuals should also have a flag set so that they remain on the DU roster, but are not linked to any one RU. This way, if they were to move back into an RU, they will not need to be re-added as duplicate.

Definition of InstAtTimeOfPrevint flag: Persons who are key and were institutionalized in a health care facility for longer than 100 days as of the interview date in the previous round. This flag is set during inter-round processing after evaluating CAPI responses for

the current round. The flag is left empty for anyone not meeting these stated conditions, including current RU members, or persons who were institutionalized in a facility that does not provide 24 hour skilled nursing care, or persons who were not key, but institutionalized in a health care facility.

Definition of PersRndStatus: Each person who is eligible to continue with the interview after Reenumeration gets a status for the round. This status is based directly on CtrlTrackSumm status, including the absence of a CtrlTrackSumm status. Individuals who are not eligible after Reenumeartion may have a CtrlTrackSumm, but they will not have a PersRndStatus.

Link to file with logic for setting this variable:
https://mepspm.westat.com/FinalDesignDocsbyGroup/Control%20Variables/CtrlTrackSumm_CurrentVersion.docx

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CtrlNewStudent   **(GL1095)**   **Item Type:** Route   **Type Class:** If Then

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Route Details: **Person-Level Control Variable – New Student**

Variable: CtrlNewStudent

Label: Status

Values: Yes,No

Definition: Variable set and used only in the ST, RE-A, RE-B Sections.

A person identified as a student must meet the following criteria to qualify as a MEPS New Student:
> Parents are part of the MEPS sample; living away from the parent RU, but within the U.S.; attending post-secondary school either part-time or full-time; age 17-23, inclusive; never been married; and not serving on full-time active duty in the Armed Forces.

Link to file with logic for setting this variable:
https://mepspm.westat.com/FinalDesignDocsbyGroup/Control%20Variables/CtrlNewStudent_CurrentVersion.docx

BeginDate   **(GL1100)**   **Item Type:** Route   **Type Class:** If Then

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Route Details: **Person-Level Control Variable – Reference Period Beginning**

Dates

Variable: BegRefM, BegRefD, BegRefY
Label: Beginning of reference period

Values: BegRefM: 1-12, EMPTY
            BegRefD: 1-31, EMPTY
            BegRefY: 2017 and forward, EMPTY

Definition: Variable set and used only in the ST, RE-A, RE-B Sections. These three variables specify the start dates of the reference period for a given person for the current interview.

Note: Programmers will only use reference date if eligibility is set to yes; otherwise reference dates are ignored.
Eligibility=yes. Every one preloaded in this RU; Jan, I in Rd 1 or Previous round interview date Rds. 2-5 (Including Previous Round institutionalized eligibility = yes)

Joiners, (not merged, not newborns, including Former RU members out of scope in a previous round and now back in the RU): Date joined RU
Newborns – Rd 1 it's Jan 1. Or date of birth if after 1/1, Rds 2-5 Its Previous Round interview date or date of birth if after PRID
Merges - Rds 2-5 Its Previous Round interview date or date moved in if after PRID
NewStudents – set to 1/1 in Rd 1. Rds 2-5 previous rd interview date.

Link to file with logic for setting this variable:
https://mepspm.westat.com/FinalDesignDocsbyGroup/Control%20Variables/BeginningRefDates_CurrentVersion.docx

EndDate   **(GL1105)**   **Item Type:** Route   **Type Class:** If Then

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Route Details: **Person-Level Control Variable – Reference Period Ending Dates**

Dates

Variable: EndRefM, EndRefD, EndRefY

Label: End of reference period

Values: EndRefM: 1-12, EMPTY
EndRefD: 1-31, EMPTY
EndRefY: 2017 and forward, EMPTY

Definition: Variable set and used only in the ST, RE-A, RE-B Sections. These three variables specify the end dates of the reference period for a given person for the current interview.

Link to file with logic for setting this variable:
https://mepspm.westat.com/FinalDesignDocsbyGroup/Control%20Variables/EndRefDates_CurrentVersion.docx

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CommentCatego   **(GL1110)**   **Item Type:** Route   **Type Class:** If Then

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Route Details: Comment Categories:

- RU/RU Member
- RU Member Refusal
- Condition
- Health Care Events
- Glasses/Contact Lenses
- Other Medical Expenses
- Prescribed Medicines
- Employment
- Health Insurance
- Other

Programmer Instructions:
Store with comments:
CreateQ type variable – at what item the comment is made, Person ID – ID of person to whom comment applies, Current Interviewer ID, RU ID.

Display Instructions:
Directly above the comment categories, display the following interviewer instructions in upper case:
SELECT COMMENT CATEGORY.

TO REVIEW DATA ALREADY IN CAPI, EXIT COMMENT POP-UP, THEN PRESS F2.

Directly above the comment text entry box, but below the comment category options, display one of the following instructions in red, mixed case text when the corresponding comment category is selected. Use a null display until a category is selected.

If 'RU/RU Member' is selected, display in red immediately above text entry box:
Required: RU member name, action (edit or delete RU member).
If an edit to RU information (name, DOB, sex) is needed, please provide detailed information required to make the edit. To add a new RU member, exit Comment pop-up, then press F2.
THESE CHANGES WILL NOT BE REFLECTED UNTIL THE NEXT ROUND.

If 'RU Member Refusal' selected, display in red immediately above text entry box:
Required: RU member name, which interview sections refusing

If 'Condition' is selected, display in red immediately above text entry box 3 lines of text:
Required: RU member name, condition name, action (add, edit, delete) and details to inform action
If condition relates to event, note: Event date and provider name
If condition relates to a medicine, note: Medicine name

If 'Health Care Event' is selected, display in red immediately above text entry box 2 lines of text:
Required: RU member name, event type, date(s), provider, action (add, edit, delete) and details to inform action
Or to add event in CAPI: Exit Comment pop-up, then press F2

If 'Glasses/Contact Lenses' selected, display in red immediately above text entry box:
Required: RU member name, action (add, edit, delete) and details to inform action

If 'Other Medical Expenses' selected, display in red immediately above text entry box:
Required: RU member name, type (ambulance, medical equipment or disposable supplies), action (add, edit, delete) and details to inform action

If 'Prescribed Medicines' selected, display in red immediately above text entry box:
Required: RU member name, medicine name, action (add, edit, delete). If add: include strength, form, condition(s), date first used, times filled during reference period, pharmacy where filled

If 'Employment' selected, display in red immediately above text entry box:
Required: RU member name, employer name, job start/end dates, action (add, edit, delete) and details to inform action

If 'Health Insurance' selected, display in red immediately above text entry box:
Required: RU member name, policyholder, plan name, coverage dates, action (add, edit, delete) and details to inform action

If 'Other' selected, display in red immediately above text entry box:
Required: RU member name, action (add, edit, delete) and details to inform action

Below the characters remaining indicator, display the interviewer instruction: PRESS ENTER TO ADD COMMENT OR ESC TO CANCEL.

IntvStat   **(GL1115)**   **Item Type:** Route   **Type Class:** If Then

---

Route Details: **Interview Status Code**
The status of an interview after it leaves the CAPI instrument. The specifications included are only the status codes that CAPI will assign based on where the interviewer exited the case.

Blaise Result Code Result Code Label

00 Not Started

01 Pending

85 Entire RU ineligible before 1/1/{YEAR}, multiple reasons

86 Entire RU ineligible, non-key NHIS student

87 Re-enum Complete, no eligible members, ineligible

71 Re-enum Complete, no eligible RU members, ineligible

72 RU institutionalized prior round, still institutionalized

10 Complete with RU member

11 Complete with proxy, all RU members deceased

12 Complete with proxy, all RU members institutionalized or deceased

13 Complete with proxy

Link to file with logic for setting this variable:
https://mepspm.westat.com/FinalDesignDocsbyGroup/Interview%20Status%20Codes/Interview%20Status%20Codes.docx

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StateLookup   **(GL1120)**   **Item Type:** Route   **Type Class:** If Then

---

Route Details: Here is a list of state abbreviations for the state lookup file, including Foreign Country, FC:

Alabama, AL
Alaska, AK
Arizona, AZ
Arkansas, AR
California, CA
Colorado, CO
Connecticut, CT
Delaware, DE
District of Columbia, DC
Florida, FL
Georgia, GA
Hawaii, HI
Idaho, ID
Illinois, IL
Indiana, IN
Iowa, IA
Kansas, KS
Kentucky, KY
Louisiana, LA
Maine, ME
Maryland, MD
Massachusetts, MA
Michigan, MI
Minnesota, MN
Mississippi, MS
Missouri, MO
Montana, MT
Nebraska, NE
Nevada, NV
New Hampshire, NH
New Jersey, NJ
New Mexico, NM
New York, NY
North Carolina, NC
North Dakota, ND
Ohio, OH
Oklahoma, OK
Oregon, OR
Pennsylvania, PA
Rhode Island, RI
South Carolina, SC
South Dakota, SD
Tennessee, TN
Texas, TX
Utah, UT
Vermont, VT
Virginia, VA
Washington, WA

West Virginia, WV
Wisconsin, WI
Wyoming, WY
Foreign Country, FC

State Lookup: DK, RF, FC

Blaise Item #	Description	DK/RF allowed (per Blaise spec)?	"FC"code should be allowed in BLAISE
RE40_04	Home	No	No
RE450_05	Nursing home (moving to)	Yes	Yes
RE840_05	Nursing home (at NHIS)	Yes	Yes
RE1240_04	Student split address	Yes	No
RE1260_04	Reg. split address	Yes	No
PV50_06	Person-provider address	Yes	Yes
PV60_05	Facility-provider address	Yes	Yes
PM170_05	Pharmacy State	Yes	Yes
OF200_05	Nursing home (at NHIS)	Yes	Yes
CL40_04	Proxy address	Yes	Yes
CL170_06	Contact person address	Yes	Yes
CL200_06	Alternate respondent address	Yes	Yes
CL230_04	Mailing address	Yes	Yes
CL260_04	Second home address	Yes	Yes
CL290_04	Futur Mover address	Yes	Yes
RF70_05	Nursing home address	Yes	Yes

BreakoffsRestart   **(GL1125)**   **Item Type:** Route   **Type Class:** If Then

---

Route Details: Specifications for Breakoffs and Restarts:

Design team will add to this list as necessary.

Break-offs and Restarts:

This specifies what happens in CAPI when a break off occurs, depending on where in the instrument the break-off happens.
See Sharepoint Document.

Link to file: https://mepspm.westat.com/FinalDesignDocsbyGroup/Breakoffs% 20and% 20Restarts/BreakoffRestart_LC.docx

DeDupOrg   **(GL1130)**   **Item Type:** Route   **Type Class:** If Then

---

Route Details: **DeDupOrg Array Definition:**

The DeDupOrg array is an array that holds each unique organization (e.g., employer, union, private insurance source) created in employment or health insurance. This array is at the DU level, but RUs will **not** display all DeDupOrgs during a current round interview.

When deciding which DeDupOrg to display for a particular RU, the following two criteria, must be considered:

     1. If a DeDupOrg was created in this RU, display it when it meets other filter criteria

     2. If a DeDupOrg has a direct link to someone in this RU, display it when it meets other filter criteria. (For example, if Job was created in RU-A, but person with this job is in RU-B now, we would display the Job since there is a direct link to this Org in this RU).

The following fields are part of the DeDupOrg Array:
DedupOrgID
DedupOrgName
DedupOrgTp
- Employer
- Union_
- Direct Purchase - Employer
- Direct Purchase - Union
- Direct Purchase - Other

OrigRnd
CreateQ
MostRecentRU*

(*subject to change)

ArrayLimit   **(GL1135)**   **Item Type:** Route   **Type Class:** If Then

---

Route Details: **Array Limits:**

Arrays within the CAPI questionnaire all have a limit.

Persons – RU: 25   (per panel)
Persons – DU: 30   (per panel)
Conditions – Persons: 100   (per panel)
PMeds – Persons: 110   (per panel)
Providers – RU: 120   (per panel)
Events – RU: 500   (per round)
Open Events – (Preload) Persons: 15   (per round)
Interview Session - RU: - 10 (per round)
Proxy Respondents – RU: 10 (per panel)
Jobs – RU: 75 (per panel)
Pharmacies – RU: 20 (per panel)
Health Insurance – RU: 25 (per panel)
Health Insurance – DU: 30 (per panel)
DeDupOrg – RU: 75 (per panel)
Flat Fee Groups – RU: 50 (per panel)
SOPs – RU: 25   (per panel)
Copays – Provider: 25 (per panel??)
Copays – (Preload array) RU: 30 (per panel)
Authorization Forms/SAQs – RU: 75 (per round)
Repeat Visit groups – RU: 50 (per round)
OM Records – RU: 100 (per round)

When the limit is reached on an array that adds elements via a roster that uses CTRL-A, CAPI should display the following message once that limit is reached and the FI tries to use CTRL-A again:

"YOU HAVE REACHED THE MAXIMUM NUMBER OF ENTRIES FOR THIS ROSTER. ADD ADDITIONAL ENTRIES IN COMMENTS (F9)."

CAPI should not display the CTRL-A pop-up after the maximum has been reached.

If the limit is reached within a roster where multiple entries are allowed via CTRL-A, CAPI should allow only the number of entries until the maximum is reached. For example, the condition roster allows up to 5 entries to be made in a single pop-up. If there are 98 conditions already on a roster for a person when CTRL-A is pressed, CAPI should allow only 2 additional condition entries – not the 5 traditionally allowed.   Whenever the pop-up allows less than the max number of entries traditionally allowed, display the following message: "YOU ARE ALMOST AT THE MAXIMUM NUMBER OF ENTRIES FOR THIS ROSTER. LESS THAN 5 ENTRIES ALLOWED. AFTER PRESSING ENTER, ADD ANY ADDITIONAL ENTRIES IN COMMENTS (F9)."

The arrays that use CTRL-A to add elements include: Persons, Conditions, PMeds, Providers, (events via ED), Proxy respondents, Jobs, Pharmacies, Flat Fee groups, and SOP.

For arrays where the limit can be reached in a way other than CTRL-A (e.g., interview session, events, copays, health insurance), a more custom message will need to be given.
  • Interview Session – When starting the interview at the 10th interview session, display the following message: "YOU HAVE REACHED THE MAXIMUM NUMBER OF RESTARTS ALLOWED. THE INTERVIEW MUST BE FINISHED DURING THIS

INTERVIEW SESSION."

• Events – If FI attempts to create an event after 500 events already on the event array, display the following message: "YOU HAVE REACHED THE MAXIMUM NUMBER OF EVENTS ALLOWED FOR THIS RU FOR THIS ROUND. ADD ANY ADDITIONAL EVENTS IN COMMENTS (F9)."

• Copays – If at BOX_140 in the CP section a copayment situation cannot be created because the limit has been reached, display the following message: "YOU HAVE REACHED THE MAXIMUM NUMBER OF COPAYMENT SITUATIONS THAT CAN BE CREATED FOR THIS RU. FULL CHARGE PAYMENT INFORMATION WILL BE ASKED FOR EACH EVENT FOR THIS PERSON-PROVIDER PAIR."

• Health Insurance – If FI attempts to create insurance after 25 insurances are on the RU insurance array or if a gate question to create insurance was coded yes, but additional sources were added after looping on other sources, display the following message (at the 25th insurance source): "YOU HAVE REACHED THE MAXIMUM NUMBER OF INSURANCE SOURCES THAT CAN BE RECORDED FOR THIS RU. ADDITIONAL DETAIL MAY NOT BE COLLECTED ON HEALTH INSURANCE ADDED AFTER THIS POINT. RECORD ADDITIONAL HEALTH INSURANCE INFORMATION IN COMMENTS (F9)."

The Open Event array cannot reach its max limit during the current CAPI interview and therefore does not need a max limit message.

The AF/SAQ array could reach its max limit during CAPI, but no message needs to display as it is transparent it FIs since the array is built in the background.

The DuDupOrg array could reach its max limit during CAPI, but no message needs to display as it is transparent it FIs. The array is built in the background and corresponds directly to the Health Insurance and Jobs arrays.

For MHOP Processing: When a limit has been reached for any array, the case should be flagged for home office review to determine if additional processing needs to occur. For example, if there were too many AFs, then we would have to add the extra records to the AF for the next round or if there were too many jobs and insurers that caused the DedupOrg array to go over the limit.

REWall	**(GL1140)**	**Item Type:** Route	**Type Class:** If Then

Route Details: At the RE Wall all relevant RU and Person level data established in Re-enumeration are copied to areas (arrays and external databases) more readily accessible by the various parts of the instrument to facilitate programming and reduce performance issues. Preloaded data is also added to these areas creating a static quick reference library for the rest of the program. This is done once and a virtual "wall" is dropped so users cannot go back to Re-Enumeration and change primary data points (name, age, gender, etc.) that could, in turn, take large swaths of data off.

In addition to copying person level data and preloaded data to other areas, the RE Wall also performs settings for use in later interview sections and for home office processing.

Link to file with logic for processing at RE Wall:

https://mepspm.westat.com/FinalDesignDocsbyGroup/RE%20Wall/RE%20Wall.docx

CTRL-S	**(GL1145)**	**Item Type:** Route	**Type Class:** If Then

Route Details: CTRL-S is enabled in the following sections of the questionnaire:
-PE
-ED
-PM
-OM
-CS
-AH
-QS
-EM
-RF

DUvRUPreloads   **(GL1150)**   **Item Type:** Route   **Type Class:** If Then

Route Details: <u>DU vs. RU Level Preloads</u>

Items/arrays that are preloaded on an RU-level:

1. Household data
2. Providers
3. Copayments
4. Source of Payment
5. Proxies
6. Relationships
7. AltPhone (alternate phone numbers)

Items/arrays that are preloaded on a DU-level:

1. Persons
2. Pharmacies (may be RU level until Spring 2019)
3. FlatFees
4. Insurance
5. Covered Persons
6. DedupOrg
7. Jobs
8. AF's
9. Events
10. Conditions
11. PMeds

DatePicker   **(GL1155)**   **Item Type:** Route   **Type Class:** If Then

Route Details: **The specs for the date picker (launched at EV40) and the HS date picker (launched at EV30) are both located in this Sharepoint folder:**

https://mepspm.westat.com/FinalDesignDocsbyGroup/Forms/AllItems.aspx? RootFolder=%2FFinalDesignDocsbyGroup%2FDate%20picker%20specs&FolderCTID= 0x012000CE0FAA87D31EF94CB16570AFD8729C46&View=%7BB0F5D183%2DE0BB% 2D4DB4%2DB308%2DB130405E7963%7D

These specs include the layout and functionality of the date picker screen, related edit checks and verification screens, and the recurrence feature.

SavingFinalResp (GL1160)   **Item Type:** Route   **Type Class:** If Then

Route Details: CAPI should save the final response at all question types, even after backing up and moving
forward several times. The final response should always be the one saved.

ArraySummaries **(GL1165)**   **Item Type:** Route   **Type Class:** If Then

Route Details: Summary of Arrays used in MEPS
The CAPI instrument uses various arrays to store lists of information. These arrays are stored on the main data model. Array variables can hold copies of values for source variables asked and stored elsewhere and generally are used to control routing through the instrument or to feed the content of rosters displayed throughout the instrument. The following summary document lists the arrays along with some other attributes about the array, including the different flags that are present on each array.

This summary includes:

- The name of the array
- Description – a brief description of either the array contents or how the array is used in the instrument
- ID Numbering- For all arrays that are at an RU level, that can also move across RU's when the person moves, must structure the ID's in the following way: the RU letter has to correspond with the first digit and in order to determine the next ID, programmers must use the largest ID within that RU and add one. The arrays that move with persons across RU's are providers, jobs, and SOP's. In the spring of 2019, we will migrate the ProvID structure to a four-digit ID structure, where the first digit corresponds with the RU letter and the next ID is determined by looking at the largest ID within an RU and adding one (as described above)
- DeleteFlg- Whether the entity was flagged for deletion. All of these arrays must include a DeleteFlag
- Editable – whether the information added is editable or not (this corresponds with entities added using CTRL-A in CAPI)
- Deletable – whether the information added is deletable or not (this corresponds with entities added using CTRL-A in CAPI)
- DeleteQ – The question at which the entity was deleted. All of these arrays must have a DeleteQ.
- CreateQ – what question the entity was created.
- OrigRnd – The round in which the entity was created
- OrigRU – The source RU that the entity was created in
- MostRecentRU – The most recent RU

Link to the file with the Array Summary:

https://mepspm.westat.com/FinalDesignDocsbyGroup/Array%20Summary/ArraySummary.xlsx

ConditionLookup (GL1170)   **Item Type:** Route   **Type Class:** If Then

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Route Details: **Lookup Look and Feel**

Pressing CTRL-A launches the Condition Lookup. There are two columns displayed in the lookup which are CondName (Condition Name) and Probe. Once a search string is entered, the directory displays the potential matches. These potential matches are selected using a trigram score percentage threshold of 35%.

When a condition name is selected in the lookup it will be highlighted in blue. The condition name highlighted in blue in the list will also display in a "DETAILS" line at the top of the screen (in red). Pressing "Enter" when a condition name in the look-up is highlighted adds that selected entry to the roster and CAPI automatically returns to MV70/TH90/OP60/HS40/ER30/IC30/HH80/PM120 (the item where the condition look-up was launched).

There should be a button option on the pop-up lookup for "No Match." When "No Match" is selected, CAPI should display a text box to allow the entry of a condition name text string allowing up to 30 characters. Upon selecting "No Match", the cursor should go straight to that text box. After typing the condition and pressing "Enter", that newly typed condition will be added to the roster and CAPI automatically returns to the item where the condition look-up was launched.

Whether a condition was added through the look-up search or via entering in the text box, CAPI will return to the item where the condition look-up was launched with the condition added to the roster and that condition will appear as selected. Returning to the item where the condition look-up was launched allows the interviewer to add or select another condition.

The following search tips should appear at the bottom of the pop-up: "SEARCH TIPS:
• *You must type at least 3 characters
• *Review the DETAILS line at the top to verify correct selection " The following probing rules should appear at the top right of the pop-up:

PROBING RULES

R Provides…

Probe…

SYMPTOM
• Do you know what condition caused the (symptom)?
• What is the name of the condition?
• What did the doctor call it?
SYMPTOMS (multiple)
• Were the (symptoms) parts of the same condition?
• What is the name of the condition?

PROCEDURE (surgical or medical)
• Why did you have the surgery/procedure?
• What was the condition which required the surgery/procedure?
ACCIDENT
• Was there a medical condition that resulted from the accident?
DRUG
• What was the condition which required this medicine?
The following tips should appear at the bottom right of the pop up.
COMMON SYNONYMS TO SEARCH
If you hear this… Try this…
Hurt Injury
Laceration Cut
Fractured, Cracked, Crushed Broken Sore, Ache, Tender Pain Issue, Condition, Disorder, Trouble Problem
Always verify selection with respondent!
Functionality
Limited delete allowed. Interviewer may delete a condition added at this item until CAPI

---

creates the link between this condition and the event. The link is created when the collection of utilization and/or charge/payment data is complete.

If CTRL-D is pressed when there are no conditions eligible to be deleted (conditions that were not added at the current question or for conditions after an event link is created) display the following error message: "THERE ARE NO CONDITIONS THAT CAN BE DELETED. ONLY CONDITIONS ADDED AT THE CURRENT QUESTION AND NOT LINKED TO AN EVENT CAN BE DELETED."

Limited edit allowed. Interviewer may edit only a manually entered condition name newly added at this item until CAPI creates the link between this condition and the event. The link is created when the collection of utilization and/or charge/payment data is complete. Edits are not allowed at any point for conditions previously selected or added from the look-up.

If CTRL-E is pressed when there are no conditions eligible to be edited (conditions that were linked to an event or conditions that were added during a previous round) display the following error message: "THERE ARE NO CONDITIONS THAT CAN BE EDITED. ONLY CONDITIONS MANUALLY ADDED AT THE CURRENT QUESTION AND NOT LINKED TO AN EVENT CAN BE EDITED"

Roster behavior:

1. Selection should not impact the round flag of the condition.
2. Interviewers can only search for and add one condition at a time through the lookup.
3. Disallow adding conditions that already exist on the roster. If there is an attempt to add a condition that already exists on the roster display the following error message

"{CONDITION} IS ALREADY ON THE LIST". Since Condition.CondName has a maximum length of 30 characters, for entries longer than 30 characters only use the first 30 characters when checking for possible duplicate entries. Display {CONDITION} as the condition that already exists on the roster. After the error message is closed, the existing condition should be automatically selected. The following entry methods should be checked for possible duplicate entries:

• For conditions selected from lookup
• For conditions added through No Match
• For edits of (No Match) conditions

Background Variables

Background variables to be saved under Person.Condition array:

• CondListID (Structure is as follows: YYYYRNNNN, where YYYY=Year the condition is added to the picklist, R=Spring(1) or Fall(2), and NNNN is a sequential number that starts over at 0001 each season.
• CondName
• CreateQ
• OrigRnd
• Search String
• Editable
• Deleteable

The Condition Picklist is located here:

https://mepspm.westat.com/FinalDesignDocsbyGroup/Condition%20Look-up%20List

PrescribedMedL   **(GL1172)**   **Item Type:** Route   **Type Class:** If Then

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Route Details: **Lookup Look and Feel**

Pressing CTRL-A launches the Prescribed Medicine Lookup. There are two columns displayed in the lookup which are Medicine (MedicineName) and Probe. Once a search string is entered, the directory displays the potential matches. These potential matches are selected using a trigram score percentage threshold of 35%. A maximum of 18 potential matches are displayed on the lookup screen at once.

When a medicine is selected in the lookup it will be highlighted in blue. The medicine highlighted in blue in the list will also display in a "DETAILS" line at the top of the screen (in red). Pressing "Enter" when a medicine in the lookup is highlighted adds that selected entry to the roster and CAPI automatically returns to MV120/TH110/OP100/HS100/ER70/PM30/PM60/PM80/PM100 (the item where the Prescribed Medicine lookup was launched).

The lookup should have four buttons at the bottom, from left to right: "Select", "Edit", "NO Match", and "Cancel".

Choosing "Select" when a medicine is highlighted in the lookup should work identically to pressing "Enter" – the selected entry is added to the roster and CAPI automatically returns to the item where the Prescribed Medicine lookup was launched.

When "Edit" is selected, CAPI should display a text box to allow for editing the text of the currently selected medicine entry from the lookup list. Upon selecting "Edit", a text box should open with the text of the original medicine entry selected in blue text, and the cursor at the right end. This text box will allow up to 60 characters. After modifying the medicine entry and pressing "Enter", the edited medicine will be added to the roster and CAPI automatically returns to the item where the Prescribed Medicine lookup was launched. Edited medicine entries will not be added to the master medicine lookup list.

When "No Match" is selected, CAPI should display a text box to allow the entry of a medicine text string with a maximum of 60 characters. Upon selecting "No Match", the cursor should go straight to that text box. After typing the medicine and pressing "Enter", that newly typed medicine will be added to the roster and CAPI automatically returns to the item where the Prescribed Medicine lookup was launched.

When "Cancel" is selected, CAPI should automatically return to the item where the Prescribed Medicine lookup was launched.

Whether a medicine was added through the lookup search or via entering in the text box, CAPI will return to the item where the medicine lookup was launched with the medicine added to the roster and that medicine will appear as selected. Returning to the item where the medicine lookup was launched allows the interviewer to add or select another medicine.

The following search tips should appear at the bottom of the pop-up:

"SEARCH TIPS:
    * You must type at least 3 characters
    * If drug name is unclear, probe for spelling
    * Adding full name, strength, or form may help you find a match
    * Review the DETAILS line at the top to verify correct selection"
The following probing rules appear at the top right of the pop-up:

PROBING RULES

R does not provide…
Probe…

DRUG
• Do you know the specific name of this medicine?
   • IF NO: What is the purpose of this medicine?

STRENGTH
• What strength is this medicine?

FORM
• What form is this medicine?

LASA (look-alike sound-alike)
• Many medicine names look and sound alike. I selected (SPELL MEDICINE NAME). Is that correct?

The following tips should appear at the bottom right of the pop-up.

COMMON SYNONYMS TO SEARCH
If you hear this… Try this…
EYE DROPS OPHTH SOL
AEROSOL, PUMP, SPRAY INHALER
FLEX(PEN), SYRINGE, NEEDLE INJECTION

COMMON PMED ABBREVIATIONS

• DR = DELAYED RELEASE
• ER/XR = EXTENDED RELEASE
• HCL = HYDROCHLORIDE
• HCTZ = HYDROCHLOROTHIAZIDE
• OPHTH = OPHTHALMIC SOLUTION
• SUSP = SUSPENSION

Functionality
Limited edit allowed. Interviewer may edit only a manually-entered medicine name newly added at this item until CAPI creates the link between this medicine and the event. The link is created when the collection of utilization and/or charge/payment data is complete or if the medicine is never linked to an event, it may be edited until the end of the interview. **Edits are not allowed at any point for medicines previously selected or selected from the look-up.**

If CTRL-E is pressed when there are no medicines eligible to be edited (medicines that were selected from the look-up, linked to an event, or medicines that were added during a previous round) display the following error message: "THERE ARE NO MEDICINES THAT CAN BE EDITED. ONLY MEDICINES MANUALLY ADDED AT THE CURRENT QUESTION AND NOT LINKED TO AN EVENT CAN BE EDITED"

Limited delete allowed. Interviewer may delete a medicine added at this item until CAPI creates the link between this medicine and the event. The link is created when the collection of utilization and/or charge/payment data is complete or if the medicine is never linked to an event, it may be deleted until the end of the interview.

If CTRL-D is pressed when there are no medicines eligible to be deleted (medicines that

were not added at the current question or for medicines after an event link is created) display the following error message: "THERE ARE NO MEDICINES THAT CAN BE DELETED. ONLY MEDICINES ADDED AT THE CURRENT QUESTION AND NOT LINKED TO AN EVENT CAN BE DELETED."

Roster behavior:

1. Interviewers can only search for and add one medicine at a time through the lookup.

2. Disallow adding medicines that already exist on the roster. If there is an attempt to add a medicine that already exists on the roster display the following error message "{MEDICINE} IS ALREADY ON THE LIST". Display {MEDICINE} as the medicine that already exists on the roster. After the error message is closed, the existing medicine should be automatically selected. The following entry methods should be checked for possible duplicate entries:

- Medicines selected from lookup
- Medicines added through No Match
- Edits of (No Match) medicines

The duplicate hard check should remove spaces from entries when checking for possible duplicate entries.

Background Variables

Background variables to be saved under Person.PMed array:

PmedID
PmedName
CreateQ
OrigRnd
PmedListID (Structure is as follows: YYYYRNNNN, where YYYY=Year the condition is added to the picklist, R=Spring(1) or Fall(2), and NNNN is a sequential number that starts at 0001.
SelectRnd_UT
SelectRnd_PM
Search String
Editable
Deleteable

The Prescribed Medicine Picklist is located here:
https://mepspm.westat.com/FinalDesignDocsbyGroup/ PMed%20Look-up% 20List

ShowcardCallout **(GL1175)**   **Item Type:** Route   **Type Class:** If Then

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Route Details: The showcard book icon will be displayed in the default interviewer instruction color of Royal Blue. The showcard number should be displayed in the following color:

Card	Item Number(s)	Color
ST-1	ST67	Orange
RE-1	RE113, RE1104	Purple
RE-2	RE1170_3, RE1170_04	Purple
RE-3	RE1170_05	Purple
PE-1	PE90	Green
PE-2	PE140	Green
PE-3	PE300	Green
HE-1	HE110, HE120, HE130, HE140, HE150, HE160, HE170, HE180	Red
PP-1	PP10, PP170	Yellow

PP-2	PP20, PP180	Yellow
PP-3	PP30, PP190	Yellow
PP-4	PP40, PP200	Yellow
PP-5	PP50, PP210	Yellow
PP-6	PP53, PP213	Yellow
PP-7	PP55, PP215	Yellow
PP-8	PP60, PP220	Yellow
PP-9	PP70, PP230	Yellow
PP-10	PP80, PP240	Yellow

PP-11	PP100, PP260	Yellow
PP-12	PP120, PP280	Yellow
PP-13	PP130, PP290	Yellow
PP-14	PP140, PP300	Yellow
PP-15	PP150, PP310	Yellow
PP-16	PP160_01, PP320_01	Yellow
EV-1A	EV20	Orange
EV-1B	EV20	Orange
HS-1	HS50	Green
ER-1	ER10	Purple

ER-2	ER50	Purple
OP-1	OP20	Red
OP-2	OP30	Red
OP-3	OP40	Red
OP-4	OP80	Red
MV-1	MV20	Orange
MV-2	MV30	Orange
MV-3	MV50	Orange
MV-4	MV90	Orange
TH-1	TH30	Purple

TH-2	TH40	Purple
TH-3	TH70	Purple
DN-1	DN10	Yellow
DN-2	DN20	Yellow
HH-1	HH10, HH40	Green
HH-2	HH20, HH50	Green
IC-1	IC10	Purple
OM-1	OM40	Red
OM-2	OM50	Red

CP-1	CP80, FF100	Orange
CP-2	CP130, CP190	Orange
CS-1	CS150A, CS150B, CS150C, CS150D, CS160A, CS160B, CS160C, CS170A, CS170B, CS170C, CS180A, CS180B, CS180C	Green
CS-2	CS200, CS220, CS240, CS250, CS260, CS270, CS300	Green
CS-3	CS230	Green
CS-4	CS280	Green
AC-1	AC110	Yellow
AC-2	AC140, AC160	Yellow
AC-3	AC180	Yellow

HX-1	HX50_01, HX60, HX330_01, HX330_02, HX330_03, HX340, HX380	Red
HX-2	HX190, HX200, HX300	Red
HX-3	HX230	Red
HX-4	HX460, PR80	Red
HX-5	HX520, PR140	Red
HX-6	HX620, OE130	Red
HX-7	HP40	Red
IN-1	IN100, IN120, IN310, IN390	Yellow
IN-2	IN140, IN160, IN180, IN220, IN260, IN290, IN340, IN370, IN430, IN640, IN780	Yellow
IN-3	IN480, IN550, IN600, IN690	Yellow

IN-4	IN730, IN740	Yellow
AS-1	AS50, AS80	Green
AS-2	AS120	Green

RGB color codes for programmer reference:

Purple:

Red: 163 Green: 73 Blue:164

Green:

Red: 0 Green: 153 Blue: 0

Red:

Red: 255 Green: 0 Blue: 0

Yellow:

Red: 204 Green: 204: Blue: 0

Orange:

Red: 255 Green: 127: Blue: 39

GenericizingSpec **(GL1180)**   **Item Type:** Route   **Type Class:** If Then

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Route Details: Genericizing Specs New Variables:

To accommodate the addition of rounds 6, 7, 8 and 9, the variables below were introduced to assist with removing the majority of specific rounds references in CAPI, and instead replace them with more generic round references.

• RndType= First, Cross, Within, Final

• Cross: The round crosses two calendar years (i.e., 12/31)

• Within: Rounds within a single calendar year, AKA not first (RndType<>First) or Final (RndType<>Final) or Cross (RndType<>Cross); may include rounds 2/4/6/8 depending on when AHRQ determines the final round of the panel should be

• First, Cross, Within, Final are all mutually exclusive

• ThirdPanYear

• FourthPanYear

• RndCycle=Fall, Spring

• AskAssets

To accommodate the addition of rounds 6, 7, 8 and 9, following decisions were made to standardize the process of removing the majority of specific rounds references in CAPI, and instead replace them with more generic round references.

Genericizing Decision- Round 1 or "else"

• If the spec mentions just Round 1, or Round 1 or "else" (another statement), leave as is in the spec.

• For Round 1 or "else", programmers will need to check their code to make sure it is programmed as "not round 1" and doesn't use "not Rounds 2-5"

Genericizing Decision- Round 1 "and other statement"

• If the spec mentions Round 1 along with another round, then change to refer to RndType and/or RndCycle depending on the programmatic needs.

• Wording

• If current round is not the first round of the panel (RndType<>First).

• If current round is the first round of the panel (RndType=First)

• in a round which is not the first round of the panel(RndType<>First)

• in the first round of the panel (RndType=First)

Genericizing Decision- RndType=Cross

• Decision- Replace instances in spec for round 3 when referring to routing or question text that refers to rounds that cross two panel years.

• Cross panels act like round 3 (Cross between December 31 and January 1)

• Wording

• If current round is a round that crosses two calendar years (RndType=Cross)

Genericizing Decision- RndType=Final

• Replace round 5 with "final round of the panel (RndType=Final)"

• Wording

• If current round is not the final round of the panel (RndType<>Final).

• If current round is the final round of the panel (RndType=Final)

• in a round which is not the final round of the panel (RndType<>Final)

• in the final round of the panel (RndType=Final)

Genericizing Decision- Display 'as of December 31, '{Year}'

• In the final round of the panel, the interview date is always in the following year. We can use "Interview year -1" to set year display for all the fills that reference December 31, {YEAR} when year is supposed to represent the final calendar year of the panel.

• Wording

• Where 'YEAR' is the calendar year of the final round of the panel (InterviewDate Year -1)

Genericizing Decision- Adding ThirdPanYear and FourthPanYear

• Add variables for ThirdPanYear and FourthPanYear as 4 character strings. ThirdPanYear is filled if the panel extends into Rounds 6 and 7 and FourthPanYear is filled if the panel extends into Rounds 8 and 9.

Genericizing Decision- Display dates that do not refer to a specific date

• If the question doesn't refer to specific date but refers to calendar year of a panel year or round, replace using more specific year or round reference.

Genericizing Decision- Specific Round References

• For round specific references in the spec (i.e. Round 1, Round 2, Round 3, etc.), it is okay to still use on a as need basis as long as round references are updated to accommodate for rounds up to round 9.

Genericizing Decision- RndCycle

• Use RndCycle (with or without RndType) to determine routing or display. This will include all rounds that administered that particular interview cycle.

• Wording

• If the round is in the Spring cycle (RndCycle=Spring)

•If the round is in the Fall cycle (RndCycle=Fall) Genericizing Decision-AskAssets •A yes or empty variable, the AskAssets variable will be used to set when the asset section in CAPI is asked.

Preloaded Case Data in Spring 2024 Each interview cycle, the genericized preloaded variables will be provided to programming based on decisions received from AHRQ. The table below represent how data will be preloaded for cases in Spring 2024.

Panel	P29R1	P28R3	P27R5
RndType	First	Cross	Final
RndCycle	Spring	Spring	Spring
FirstPanYear	2024	2023	2022
SecondPanYear	2025	2024	2023
AskAssets			Yes
AFCovPeriod	1/1/24-12/31/25	1/1/23-12/31/24	1/1/22-12/31/23

(GL1185)   **Item Type:** Route   **Type Class:** If Then

Route Details: Refer to flowchart which shows the overall flow that CAPI needs to follow for Spring 2024 in:
https://mepspm.westat.com/FinalDesignDocsbyGroup/Overall%20MEPS%20Flow%20Charts/Spring_Rounds_Quex_Flow_rev_2024.pdf

<u>**OverviewofData**</u>   <u>**(GL1190)**</u>   **Item Type:** Route   **Type Class:** If Then

Route Details: **Refer to the following document for the overview of datamodels in CAPI:**
https://mepspm.westat.com/FinalDesignDocsbyGroup/Data%20Model%20Summaries/Overview%20of%20Datamodels%20and%20Sections%20in%20MepsFall2022.xlsx

SpanPlaceholder   **(GL1195)**   **Item Type:** Route   **Type Class:** If Then

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Route Details: Placeholder Label: **(PERSON)**
SPANISH Fill Specification:

- For the person being asked about, display first, middle and last name as it was entered by the interviewer. Exception: If the person name is part of an interviewer instruction, display the name in all CAPS.

- If the person being asked about is selected as the respondent, display "usted".

Placeholder Label: **{usted/él/ella}**
SPANISH Fill Specification:

- In some cases, replace the placeholder for (PERSON) with a pronoun option such as "usted/él/ella" or "su" or "sus." The correct option will be specified for each question.
- CAPI displays "usted" if the person in question is the respondent.
- CAPI displays "él" if the person in question is not the respondent and coded as male.
- CAPI displays "ella if the person in question is not the respondent and coded as female or if gender is missing.

- The pronoun "su" or "sus" is gender neutral and can be used when talking to the respondent or about another person. This pronoun option is displayed at the question as hard-coded text rather than a fill.

Placeholder Label: **(ADMIT DATE)**
SPANISH Fill Specification:

- For the event being asked about, display the visit admission date collected at EV30 if the event type is HS or IC.
- For date, display the day of the event followed by the month with the appropriate Spanish prepositions; for example, "May 12" becomes "el {DAY} de {MONTH}" or "el 12 de mayo". It is not necessary to display the year. The month name should not be abbreviated and should be displayed in lower case.
- (ADMIT DATE) = el {DAY} de {MONTH}
- If the admission day is coded DK or RF, display that as the day.
- Use the following terms for the Spanish months:
  - *enero* — January
  - *febrero* — February
  - *marzo* — March
  - *abril* — April
  - *mayo* — May
  - *junio* — June
  - *julio* — July
  - *agosto* — August
  - *septiembre* — September
  - *octubre* — October
  - *noviembre* — November
  - *diciembre* — December

Placeholder Label: **(VISIT DATE)**
SPANISH Fill Specification:

- For the event being asked about, display the visit date collected at EV40 if the event type is ER, OP, MV, TH, or DN.

- For date, display the day of the event followed by the month with the appropriate Spanish prepositions; for example, "May 12" becomes "el {DAY} de {MONTH}" or "el 12 de mayo". It is not necessary to display the year. The month name should not be abbreviated and should be displayed in lower case.
- (VISIT DATE) = el {DAY} de {MONTH}
- If the visit day is coded DK or RF, display that as the day.
- See above for the Spanish month terms.

Placeholder Label: **(MONTH) or (VISIT MONTH)**
SPANISH Fill Specification:

- For the event being asked about, display the month name from EV70 if the event type is HH.
- The month name should not be abbreviated and should be displayed in lower case. There are no other necessary Spanish prepositions.
- (MONTH) = {MONTH}
- See above for the Spanish month terms.

Placeholder Label: **(START DATE)**
SPANISH Fill Specification:

- Display the reference period start date for the person being asked about.
- For date, display the day of the start date followed by the month followed by the year with the appropriate Spanish prepositions; for example, "January 1, 2012" becomes "el {DAY} de {MONTH} de {YEAR}" or "el 1 de enero de 2012". The month name should not be abbreviated and should be displayed in lower case.
- (START DATE) = el {DAY} de {MONTH} de {YEAR}
- See above for the Spanish month terms.
- Some selected items will require the article "del" instead of "el" before the {DAY} fill. Those will be clearly marked in the questionnaire specifications.

Placeholder Label: **(END DATE)**
SPANISH Fill Specification:

- Display the reference period end date for the person being asked about.
- For date, display the day of the end date followed by the month followed by the year with the appropriate Spanish prepositions; for example, "March 12, 2012" becomes "el {DAY} de {MONTH} de {YEAR}" or "el 12 de marzo de 2012". The month name should not be abbreviated and should be displayed in lower case.
- (END DATE) = el {DAY} de {MONTH} de {YEAR}
- See above for the Spanish month terms.
- Some selected items will require the article "del" instead of "el" before the {DAY} fill. Those will be clearly marked in the questionnaire specifications.

Placeholder Label: **(MEDICINE)**
SPANISH Fill Specification:

- For the medicine being asked about for this person, display the associated medicine's name as entered on the Person's-Prescribed-Medicines-Roster. This should be consistent with the medicine name displayed in the context header (when applicable).
- Display medicine name exactly as it was entered by the interviewer.

Placeholder Label: **Other Dates**
{MONTH, DAY, YEAR OF NHIS INTERVIEW}
{DATE OF PREVIOUS ROUND INTERVIEW}
{PREV RD INTV DT}
{END DATE OF REFERENCE PERIOD}

SPANISH Fill Specification:

- There are many other types of date displays throughout the instrument. For date, display the day of the date followed by the month followed by the year with the appropriate Spanish prepositions; for example, "March 12, 2012" becomes "el {DAY} de {MONTH} de {YEAR}" or "el 12 de marzo de 2012". The month name should not be abbreviated and should be displayed in lower case.

- All date displays should be displayed as: el {DAY} de {MONTH} de {YEAR}

- See above for the Spanish month terms.

- Any exceptions to this rule will be clearly marked in the questionnaire specifications.

FlexibleGrid   **(GL1200)**   **Item Type:** Route   **Type Class:** If Then

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Route Details: Items within flexible grids typically do not include routing instructions in the specifications, since movement is freely allowed within the grid. However, when a specific response makes a subsequent grid item active or on-path, that will be noted.
Flexible grids: RE320, RE650, RE680, RE1170, CA30, ED10, CM60, RF105

[End of GL]