



PERSONAL HISTORY FORM

ID NUMBER:

FORM CODE PHX

DATE: 04/01/2016
Version 2.0

ADMINISTRATIVE INFORMATION

0a. Completion Date: / /
Month Day Year

0b. Staff ID:

A. HOUSEHOLD SOCIODEMOGRAPHICS

“Now I’d like to take a few minutes to ask questions that will update information about your household.”

1. Please look at this card. Which of these income groups represents your total combined family income for the past 12 months? Include income from all sources such as wages, salaries, social security, retirement benefits, help from relatives, rent from property and so forth. Please tell me the letter only.

[USE RESPONSE CARD]

- Under \$5,000 A
- \$5,000 - \$7,999 B
- \$8,000 - \$11,999 C
- \$12,000 - \$15,999 D
- \$16,000 – \$24,999 E
- \$25,000 – \$34,999 F
- \$35,000 - \$49,999 G
- \$50,000 – \$74,999 H
- \$75,000 – \$99,999 I
- \$100,000 and over J

2. How many people are supported by this income?

B. SOCIAL SUPPORT

3a. Can you count on anyone to help you when you need to make difficult decisions or talk over problems?

Yes..... 1
No 0

4a. Can you count on anyone to help you with daily tasks like grocery shopping, housecleaning, cooking, telephoning, or giving you a ride?

Yes..... 1
No 0



INSTRUCTIONS FOR THE PERSONAL HISTORY (PHX) FORM

I. General Instructions

The Personal History Form (PHX) collects current information on the participant's socio-demographic characteristics. The exact wording and order of the questions are followed to ensure standardization. Questions are skipped only when indicated by the skip pattern instructions.

Interviewers are certified in general clinic interviewing and familiar with the ARIC data entry system and the "General Instructions for Completing Paper Forms" (in case the computer is down) prior to administering this form.

The HEADER (paper form) is completed by scanning (or affixing if collecting data on paper first) participant ID label. THE QUESTIONS ARE READ CLEARLY USING THE EXACT WORDING ON THE FORM. The introductory and transitional scripts may deviate from the prototypes provided, but must include the same information.

II. Detailed Instructions for each Item

0a. Enter the date on which the participant was seen in the clinic.

0b. Enter the staff ID for the person who completed this form.

1. The question covers the entire family's income, not just what is earned by the individual. Give RESPONSE CARD TO THE PARTICIPANT. Ask the participant to select the letter which best represents his or her total family income. READ ALL RESPONSES (only if necessary). If the participant refuses to answer the question, record 'refused' in the field status of this question in the DMS.
2. The purpose of this question is to determine how many people are supported by the annual family income. If the number of persons varied over the past year, assist the respondent in determining the average number of persons supported.

The following two questions are designed to evaluate the level of emotional and physical support that the participant feels that s/he has.

- 3a. The respondent should be able to say if s/he knows someone whom they can rely on to help him/her when they need to make decisions that appear at the time difficult. For example, those decisions could involve moving to a retirement community, settling a dispute, financial decisions, or those could be smaller in scope everyday decisions. The trusted person can be a family member, friend, a more distant acquaintance, a health professional, or a church member. This person does not have to live in the same town as the participant.
- 4a. The purpose of this question is to determine the participant's perception of availability of help for daily tasks. It is OK if the person says that they have hired help to obtain groceries or clean the house. The response should be YES if the participant says that s/he has help with one of the tasks listed but not the other ones. If the participant says that they only rarely need help with anything, probe further to ascertain if they can count on that help if they need it.

Under \$5,000

\$5,000 - \$7,999

\$8,000 - \$11,999

\$12,000 - \$15,999

\$16,000 – \$24,999

\$25,000 – \$34,999

\$35,000 - \$49,999

\$50,000 – \$74,999

\$75,000 – \$99,999

\$100,000 and over

Q1.