On December 9, 2009, the Population Association of America (PAA) sponsored its first workshop for analysts in the Domestic Social Policy Division of the Congressional Research Service (CRS). Dr. David Weir and Dr. Kandice Kapinos, both PAA members, presented the workshop on the Health and Retirement Study (HRS). CRS analysts who cover a diverse range of topics, including pensions, health care, taxes, and welfare, selected the workshop topic. Thirteen analysts, including the Deputy Assistant Director of the Division, attended.

Dr. Weir, who is the HRS Principal Investigator, spoke first. At the request of the CRS staff, his presentation was very technical. He focused on the mechanics of the HRS, describing its sample, weights, response rates, and content. He also discussed the survey’s health data, citing specific findings and how the data compare to other health surveys.

Dr. Kapinos discussed the household wealth and income data HRS collects. She discussed the challenges researchers have faced getting accurate information about personal wealth from HRS respondents. She discussed other sources HRS uses from respondents’ employers and financial records to verify or refine information from HRS participants. She fielded questions on how disability benefits are included in personal wealth calculations as well as questions about how the study accounts for gains or losses in individuals’ investment portfolios.

The analysts asked questions throughout the briefing including the following:

- Are data on out-of-pocket health care expenditures available from the 2006 wave?
- Does HRS data suggest a change in prescription drug utilization since the creation of Medicare Part D?
- Are wellness data available?
- How useful do you feel it is to ask respondents how long they expect to live?
- Do you believe social factors are good determinants of an individual’s health?

CRS staff expressed interest in working with the HRS staff to get access to the restricted data. Dr. Weir explained the process in general terms and provided a one-page fact sheet on the process. CRS staff also expressed an interest in attending the HRS summer institute program at the University of Michigan.