HRS   2022   --   SECTION H: HOUSING
COMMENTED VERSION -- 05/26/2022

****

*** NOTE FOR REVIEWERS ***
**ALL CHANGES FOR THE 2022 WAVE INSTRUMENT ARE FLAGGED WITH
#@ LOCATED ON THE RIGHT SIDE OF THE CHANGED ITEM OR SERIES.
THUS, ALL CHANGES CAN BE LOCATED BY SEARCHING FOR #@ IN THE
DESIGN CHANGE COMMENTS COLUMN.**

CHANGES IN ITEMS THAT WERE IN THE 2020 INSTRUMENT APPEAR IN RED.

**NEW QUESTIONS AND ASSOCIATED NEW BRANCHPOINTS, ETC., APPEAR IN
BLUE SANDWICHED BETWEEN ROWS OF *************** .**

****

NOTE ABOUT BRANCHPOINTS:

**WHERE THERE IS MORE THAN ONE JUMP WITHIN A BRANCHPOINT BOX,
THE JUMPS ARE TO BE APPLIED IN ORDER FROM THE TOP.**

****
NOTE ABOUT COLORS:

ALL TEXT IN TEAL IS SPECIFIC TO A WEB INTERVIEW.

**THE CORE INTERVIEW IS DOCUMENTED USING BLACK TEXT, BUT BLACK
TEXT CAN ALSO APPLY TO THE WEB INTERVIEW WHEN THERE ARE NO
DIFFERENCES FROM THE CORE.**

****

NOTE ABOUT BOLD/UNDERLINE TEXT:

ANY QUESTION THAT IS UNDERLINED IN THE B&A WILL APPEAR IN BOLD IN
CAPI AND WILL BE UNDERLINED FOR CAWI.

****

NOTE ABOUT NON-RESPONSE FLOW:

ANY QUESTION THAT IS ASKED BUT LEFT WITHOUT A RESPONSE IN CAWI
INTERVIEWS WILL FOLLOW THE SAME PATH AS A REFUSAL FOR THAT
QUESTION, UNLESS OTHERWISE SPECIFIED.

****

MAJOR FLOW CONTROL, CONDITION AND FILL VARIABLES *

THIS IS A **REINTERVIEW HH** (X024=1);
THIS IS A **NEW INTERVIEW HH** (X024 NOT 1)

THIS IS A **FINANCIAL R** (X007=1);
THIS IS A **FAMILY R** (X007=2);
THIS IS A **FINANCIAL & FAMILY R** (X007=3);
THIS IS A **NON-FINANCIAL & NON-FAMILY R** (X007=4)

THIS IS A **FINANCIAL R IN PW** (X077=1);
THIS IS A **FINANCIAL & FAMILY R IN PW** (X077=3);

R IS **MARRIED** (A038=1);
R IS **REMARRIED** (A038=2);
R IS **PARTNERED** (A038=3);
R IS **REPARTNERED** (A038=4);
R IS **SINGLE/OTHER** (A038=6);
R IS **NOT COUPLED** (A038 {NOT 1 and NOT 2 and NOT 3 and NOT 4})

CHILD's FIRST NAME (per X058)

R's **AGE** (per A019);
SPOUSE's/PARTNER's AGE (per A044)

FINANCIAL R's LAST IW MONTH (per X038), **YEAR** (per X039)

HH's LAST IW MAIN RESIDENCE CITY (per X025), **STATE** (STATE
ABBREVIATION)
(per X026): (AMALGAMATED INTO A086)

R **CURRENTLY LIVES IN NURSING HOME** (A028=1)
R {**OWNS OR RENTS} A HOME OUTSIDE THE NURSING HOME** (A070=1)

R HAS SAME MAIN RESIDENCE AS LAST WAVE (A071, 1= YES, 5 = NO)
R OWNS SAME 2ND RESIDENCE (A073, 1= YES, 5 = NO)
WHICH HOME IS MAIN RESIDENCE (A085, 1-4)
TYPE OF HEALTHCARE FACILITY (A237 , 1-10)

HH **LIVED ON FARM IN HH's LAST IW** (X088=1)

R **LIVED IN RETIREMENT/SENIOR CITIZEN/OTHER HOUSING WITH SERVICES
IN HH's LAST IW** (X089=1)
HH **LIVED IN RETIREMENT/SENIOR CITIZEN/OTHER HOUSING WITH
SERVICES IN HH's LAST IW** (X089=1)

HH **CHANGED MAIN RESIDENCE SINCE HH's LAST IW BUT IN SAME AREA**(X033=3);
HH **HAS NOT CHANGED MAIN RESIDENCE SINCE HH's LAST IW** (X033=5);

HH **MOVED OUT OF AREA SINCE HH's LAST IW** (X033=1)

MOVED TO MAIN RESIDENCE IN MONTH (per B040), **YEAR** (per B039)

LAST CALENDAR YEAR (per InitA061TLCY)

PREV WAVE R OWNS HOME (X079 = 1)
PREV WAVE R RENTS (X079 = 1)
PREV WAVE R IN NH (X079 = 3)
PREV WAVE R NEITHER OWN NOR RENT (X079 = 7)

PREVIOUS WAVE FINANCIAL INTERVIEW YEAR (Z093)
PREV WAVE MAIN HOME MIN (Z155)
PREV WAVE MAIN HOME MAX (Z156)
PREV WAVE 1ST MORTGAGE ON PRIMARY RESIDENCE MIN (Z157)
PREV WAVE 1ST MORTGAGE ON PRIMARY RESIDENCE MAX (Z158)
PREV WAVE SECOND HOME MIN (Z163)
PREV WAVE SECOND HOME MAX (Z164)

ALTERNATE WAVE VARIABLE IS SET TO ASK QUESTIONS (H202=0):
{H202 = (A504_CurrWaveNdx – 9) MOD 2} = 0};
I.e., When subtracting the Indices (per A504) for Beginning Wave (Index XX1 for YrXXXX) from Current Wave (Index 9 for 2008), and the result is divided by the Wave Interval of XX2, the Integer Result leaves No Remainder

ALTERNATE WAVE VARIABLE IS NOT SET TO ASK QUESTIONS (H202>0):

{H202 = {(A504_CurrWaveNdx – 9) MOD 2} > 0};
I.e., Integer Result yields a Remainder
H209_ := (piInitA504_CurrWaveNdx-8) MOD 3 {equals 0 every 3 years - Ask in 2024 }
if H209_ = 0 then
 H101_SeniorComplex
** IN 2022 NO ALTERNATE WAVE QUESTIONS ARE ASKED ~~THIS ALTERNATE WAVE VARIABLE IS SET TO NOT ASK QUESTIONS EXCEPT H101**~~

Asset Calculation - difference between waves 1 (U027) (minPW - maxCW)

Asset Calculation - difference between waves 2 (U028) (minCW - maxPW)

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* A variable fieldname and code reference is shown at its first occurrence in the questionnaire, but in some cases, especially when it is common, is not shown after that.

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H001 BRANCHPOINT: IF THIS IS AN EXIT INTERVIEW, GO TO SECTION J

IF THIS IS NOT A FINANCIAL R (X007 {NOT 1 and NOT 3}), AND R LIVES IN A HEALTH CARE FACILITY (A237 = NOT 1) GO TO H115

IF THIS IS NOT A FINANCIAL R ((X007 {NOT 1 and NOT 3}), GO TO SECTION J

IF R IS CURRENTLY IN {NURSING HOME   (A237=1) and R DID NOT REPORT THAT {OWNS OR RENTS} A HOME OUTSIDE THE NURSING HOME (A070 NOT 1), GO TO SECTION J

IF R IS CURRENTLY IN AN OTHER HEALTHCARE FACILITY (A237 = NOT 1) AND R DID NOT REPORT THAT {OWNS OR RENTS} A HOME OUTSIDE THE FACILITY (A070 NOT 1), GO TO H101 BRANCHPOINT

IF THIS IS A REINTERVIEW HH and HH HAS NOT CHANGED MAIN RESIDENCE SINCE HH's LAST IW (X033=5) and DID REPORT THAT LIVED ON FARM IN HH's LAST IW (X088=1), GO TO H002

H001

Now we have a few questions about your or your [HWP's] main residence in MAIN RESIDENCE CITY, STATE (STATE ABBREVIATION) (per A086).

IF R LIVES IN A NURSING HOME (A028=1):
(Is that home a farm or ranch?)

IF R LIVES IN A NURSING HOME (A028=1) AND OWNS A HOME OUTSIDE OF THE NURSING HOME (A070 = 1)

[INSTR: WE ARE NOT ASKING ABOUT THE FACILITY WHERE YOU LIVE RIGHT NOW.]

OTHERWISE:
(Do you live on a farm or ranch?)

1. YES
5. NO
DK
RF

IF R LIVES IN A NURSING HOME (A028=1)
Is that home a farm or ranch?

IF R LIVES IN A NURSING HOME (A028=1) AND OWNS A HOME OUTSIDE OF THE FACILITY (A070 = 1)

[INSTR: WE ARE NOT ASKING ABOUT THE FACILITY WHERE YOU LIVE RIGHT NOW.]

OTHERWISE:
Do you live on a farm or ranch?

1. YES
5. NO
DK
RF

H002

INSTR: IF THIS IS A FACE-TO-FACE INTERVIEW, YOU MAY CONFIRM RESIDENCE TYPE]

#@ OP 10/30/21 Added conditional instruction #48852

READ TO Rs WHO WERE NOT ASKED H001:
Now we have a few questions about your or your [HWP's] main residence in MAIN RESIDENCE CITY, STATE (STATE ABBREVIATION).

IF R IS LIVING IN A NURSING HOME (A028=1):
(Is that main residence in MAIN RESIDENCE CITY, STATE (STATE ABBREVIATION) a mobile home, a one family house, a two family house (duplex), an apartment, townhouse, or what?)

OTHERWISE:
(Do you live in a mobile home, a one family house, a two family house (duplex), an apartment, townhouse, or what?)

[INSTR: A MODULAR HOME SHOULD BE CONSIDERED A ONE FAMILY HOME.]

IF R LIVES IN A NURSING HOME (A028=1) AND OWNS A HOME OUTSIDE OF THE FACILITY (A070 = 1)

[INSTR: WE ARE NOT ASKING ABOUT THE FACILITY WHERE YOU LIVE RIGHT NOW.]

1. MOBILE HOME……………….. GO TO H008 BRANCHPOINT

IF R WAS NOT ASKED H001:
Now we have a few questions about your or your [HWP's] main residence in MAIN RESIDENCE CITY, STATE (STATE ABBREVIATION).

IF R IS LIVING IN A NURSING HOME (A028=1):
Is that main residence in MAIN RESIDENCE CITY, STATE (STATE ABBREVIATION) a mobile home, a one family house, a two family house (duplex), an apartment, townhouse, or what?

OTHERWISE:
Do you live in a mobile home, a one family house, a two family house (duplex), an apartment, townhouse, or what?

[INSTR: A MODULAR HOME SHOULD BE CONSIDERED A ONE FAMILY HOME.]

IF R LIVES IN A NURSING HOME (A028=1) AND OWNS A HOME OUTSIDE OF THE FACILITY (A070 = 1)

[INSTR: WE ARE NOT ASKING ABOUT THE FACILITY WHERE YOU LIVE RIGHT NOW.]

1. MOBILE HOME……………..GO TO H008 BRANCHPOINT
2. ONE-FAMILY HOUSE
3. TWO-FAMILY HOUSE OR DUPLEX
4. APARTMENT OR TOWNHOUSE
7. OTHER (SPECIFY) H003S_____

H004 BRANCHPOINT: IF R LIVES ON FARM (H001=1), GO TO H008

H004

Do you (and your [husband/wife/partner]) own your home, rent it, or what?

1. OWN (OR BUYING)
2. RENT……………... GO TO H079
3. LIVE RENT-FREE WITH RELATIVE, EMPLOYER, OR FRIEND……………..GO TO H086 BRANCHPOINT
7. OTHER (SPECIFY) H005S_____GO TO H086 BRANCHPOINT
DK……………...GO TO H086 BRANCHPOINT
RF……………...GO TO H086 BRANCHPOINT

Do you and your [husband/wife/partner] own your home, rent it, or what?

1. OWN OR BUYING
2. RENT……………..GO TO H079
3. LIVE RENT-FREE WITH RELATIVE, EMPLOYER, OR FRIEND……………..GO TO H086 BRANCHPOINT
7. OTHER (SPECIFY) H005S_____GO TO H086 BRANCHPOINT
DK……………..GO TO H086 BRANCHPOINT
RF……………..GO TO H086 BRANCHPOINT

H006 BRANCHPOINT: IF R LIVES IN A ONE-FAMILY HOUSE (H002=2) or {THIS IS A REINTERVIEW HH and HH HAS NOT CHANGED MAIN RESIDENCE SINCE HH's LAST IW (X033=5)}, GO TO H020

H006

Do you own the entire building or just your unit?

1. ENTIRE BUILDING
2. JUST R'S UNIT
DK
RF

Do you own the entire building or just your unit?

1. ENTIRE BUILDING
2. JUST MY UNIT
DK
RF

H007

The following questions refer to [the entire property/your unit only].

[INSTR: PLEASE SELECT "1" TO CONTINUE.]

1. CONTINUE

The following questions refer to [the entire property/your unit only].

[INSTR: PLEASE SELECT "NEXT" TO CONTINUE.]

H008 BRANCHPOINT: IF R DID NOT REPORT THAT LIVES ON A FARM/RANCH (H001 NOT 1) and LIVES IN MOBILE HOME (H002=1), GO TO H014 (AFTER H020)

IF R DID NOT REPORT THAT LIVES ON A FARM/RANCH
(H001 NOT 1), GO TO H020

H008

Do you (or your [husband/wife/partner]) own this (farm/ranch), do you own part of it, do you rent it, or what?

1. OWN ALL………………GO TO ~~H013~~H020
2. OWN PART
3. RENT………………..GO TO H079
7. OTHER (SPECIFY) H009S_____GO TO H086 BRANCHPOINT
DK………………..GO TO H086 BRANCHPOINT
RF………………..GO TO H086 BRANCHPOINT

Do you or your [husband/wife/partner] own this farm or ranch, do you own part of it, do you rent it, or what?

1. OWN ALL………………GO TO ~~H013~~H020
2. OWN PART
3. RENT………………GO TO H079
7. OTHER (SPECIFY) H009S_____GO TO H086 BRANCHPOINT
DK………………GO TO H086 BRANCHPOINT
RF………………GO TO H086 BRANCHPOINT

H010

Now we'd like to ask about the part of the property that you [and your] [partner|husband|wife] personally own.

About what percent of the total property is that?

[INSTR: ENTER WHOLE NUMBERS ONLY, 1-100.]

_____%

DK
RF

H011

Do you (and your [husband/wife/partner]) own the [house/mobile home] and the immediately surrounding land?

1. YES………………..GO TO H013
5. NO
DK
RF

Do you and your [husband/wife/partner] own the [house/mobile home] and the immediately surrounding land?

1. YES………………..GO TO H013
5. NO
DK
RF

H012

Do you pay any rent on this [mobile home/house]?

1. YES, PAY RENT
5. NO
DK
RF

H020   #@ BJ (2/9/22) Text change,
                                                                 #49523

IF {R AND/OR SPOUSE/PARTNER} {OWN PART OF A FARM (H008=2) and {DO
NOT OWN {HOUSE/MOBILE HOME AND SURROUNDING LAND} ON THE FARM
or DK or RF (H011=5,8,9)}}:
The following questions refer to the part of the farm that you (and your
[husband/wife/partner]) personally own.

IF H007 = 1 THEN DO NOT SHOW INTRO TEXT

OTHERWISE:
The following questions refer to your [house/mobile home] and the
immediately surrounding land.

What is its present value? We mean, what would it bring if it were sold
today?

[INSTR: DO NOT PROBE DK/RF]

[INSTR: ENTER "0" FOR NOTHING.]

 $_____ .00 ………….. GO TO U001 H014 BRANCHPOINT

DK
RF

IF {R AND/OR SPOUSE/PARTNER} {OWN PART OF A FARM (H008=2) and {DO NOT OWN {HOUSE/MOBILE HOME AND SURROUNDING LAND} ON THE FARM or DK or RF (H011=5,8,9)}}:
The following questions refer to the part of the farm that you and your [husband/wife/partner] personally own.

OTHERWISE:
The following questions refer to your [house/mobile home] and the immediately surrounding land.

What is its present value? We mean, what would it bring if it were sold today?

[INSTR: ENTER "0" FOR NOTHING.]

 $_____ .00 ………….. GO TO U001 ~~H014~~ BRANCHPOINT

DK
RF

H021

H021-H023 Unfolding Sequence
Question text:
(Thinking about its present value:)

Would it amount to less than $____ , more than $____ , or what?

PROCEDURES: 3up, 2Up1Down, 1Up2Down
BREAKPOINTS: $15,000, $50,000, $150,000, $500,000
RANDOM ENTRY POINTS: $15,000, $50,000, $150,000
ENTRY POINT ASSIGNMENT [1 ($15,000)] or [2 ($50,000)] or [{NOT 1 and NOT 2} ($150,000)] AT X053

H021-H023 Unfolding Sequence
Question text:
Thinking about its present value:

Would it amount to less than $____ , more than $____ , or what?

PROCEDURES: 3up, 2Up1Down, 1Up2Down
BREAKPOINTS: $15,000, $50,000, $150,000, $500,000
RANDOM ENTRY POINTS: $15,000, $50,000, $150,000
ENTRY POINT ASSIGNMENT [1 ($15,000)] or [2 ($50,000)] or [{NOT 1 and NOT 2} ($150,000)] AT X053

#@ BJ (11/29/21) Adding in asset rec, #48859

U001 BRANCHPOINT:

ASK IF FOLLOWING CONDITIONS ARE MET:

R HAS NOT MOVED (X033 = 5) AND LIVING R (A007 = 1)

AND PREVIOUS WAVE FINANCIAL INTERVIEW TOOK PLACE IN PREVIOUS WAVE (X039 >= 2020)

AND THIS IS A REINTERVIW HH (X024 = 1)

AND <u>SAME</u> FINANCIAL REPORTER AS LAST WAVE (X007 = 1 OR 3 AND X077 = 1 OR 3)

AND (SELF LAST WAVE AND SELF THIS WAVE (A009 = 1 AND Z095_2 = 1) OR PROXY LAST WAVE AND SAME PROXY THIS WAVE (A009 = 2 OR A009 = 3 OR A009 = 4) AND (A010 =1))

AND ASSET LEVEL THRESHOLD IS MET:

DIFFERENCE BETWEEN WAVES IS <u>GREATER THAN OR EQUAL TO</u> $50,000

    (MIN CW - MAX PW) OR (MIN PW - MAX CW) >= $50,000

    (H020 (or H021 if UNF) – Z156) or (Z155 - H020 (or H022 if UNF)) >= $50,000)

AND

DIFFERENCE BETWEEN WAVES IS <u>GREATER THAN</u> THE MIN OF PREVIOUS WAVE OR MIN OF CURRENT WAVE

    (MIN CW - MAX PW) OR (MIN PW - MAX CW) > (MIN PW OR MIN CW)

    (H020 (or H021 if UNF) – Z156) > Z155 OR (H020 (or H021 if UNF)

       OR

    (Z155 - H020 (or H022 if UNF) > Z155 OR (H020 (or H021 if UNF)

ELSE, GO TO H014 BP

Note: See Appendix for further explanation of calculations and data analysis notes

U001

IF THE RESPONDENT HAS HAD THE SAME ASSET IN BOTH, THE PREVIOUS AND THE CURRENT INTERVIEW YEAR:
According to our records, in [PREVIOUS WAVE YEAR] you owned a primary residence worth [about/less than/more than] [AMOUNT] Now you own a primary residence worth [about/less than/more than] [AMOUNT].

IF THE RESPONDENT HAS HAD THE ASSET ONLY IN THE CURRENT INTERVIEW YEAR:
According to our records, you currently owned a primary residence worth [about/less than/more than] [AMOUNT]. In [PREVIOUS WAVE YEAR] you did not own your primary residence.

IF THE RESPONDENT HAS HAD THE ASSET ONLY IN THE PREVIOUS INTERVIEW YEAR:
According to our records, in [PREVIOUS WAVE YEAR] you owned a primary residence worth [about/less than/more than] [AMOUNT] Now you do not own your primary residence.

ALL RESPONDENTS:
Does this sound right?

[INSTR: ENTER RF TO EXIT ASSET VERIFICATION.]

IF THE RESPONDENT HAS HAD THE SAME ASSET IN BOTH, THE PREVIOUS AND THE CURRENT INTERVIEW YEAR:
According to our records, in [PREVIOUS WAVE YEAR] you owned a primary residence worth [about/less than/more than] [AMOUNT] Now it is worth [about/less than/more than] [AMOUNT].

IF THE RESPONDENT HAS HAD THE ASSET ONLY IN THE CURRENT INTERVIEW YEAR:
According to our records, you currently own a primary residence worth [about/less than/more than] [AMOUNT]. In [PREVIOUS WAVE YEAR] you did not own your primary residence.

IF THE RESPONDENT HAS HAD THE ASSET ONLY IN THE PREVIOUS INTERVIEW YEAR:
According to our records, in [PREVIOUS WAVE YEAR] you owned a primary residence worth [about/less than/more than] [AMOUNT] Now you do not own your primary residence.

ALL RESPONDENTS:
Does this sound right?

1. YES ……………….. GO TO H014 BP
5. NO
DK ………………. GO TO H014 BP
RF ………………. GO TO H014 BP

U002

Which record is wrong, the [PREVIOUS WAVE YEAR] or the [CURRENT WAVE YEAR] report?

1. PREVIOUS WAVE
3. CURRENT WAVE
5. BOTH
DK ………………. GO TO H014 BP
RF ………………   GO TO H014 BP

U003

About how much [was this /is this] worth in [PREVIOUS WAVE YEAR/CURRENT WAVE YEAR]?

IF PREVIOUS WAVE THEN USE THIS INSTRUCTION:
[INSTR: ENTER "0" IF THIS ASSET DID NOT EXIST IN [PREVIOUS WAVE YEAR]

IF CURRENT WAVE THEN USE THIS INSTRUCTION:
[INSTR: ENTER "0" IF THIS ASSET DID NOT EXIST IN [CURRENT WAVE YEAR]]

[IWER: DO NOT PROBE DK/RF]

 $_____, GO TO H014 BP

DK
RF

NOTE: IF R SAID BOTH RECORDS WERE INCORRECT (U002=5) AND THE RECORD THAT WAS JUST QUESTIONED AT U003 WAS FOR THE PREVIOUS WAVE, RETURN TO U003 AND ASK ABOUT THE RECORD FOR THE CURRENT WAVE. OTHERWISE, CONTINUE ON TO THE INSTRUCTION FOR THE END OF U001 LOOP.

About how much [was this/is this] worth in [PREVIOUS WAVE YEAR/CURRENT WAVE YEAR]?

IF PREVIOUS WAVE THEN USE THIS INSTRUCTION:
[INSTR: ENTER "0" IF THIS ASSET WAS NOT OWNED IN [PREVIOUS WAVE YEAR]

IF CURRENT WAVE THEN USE THIS INSTRUCTION:
[INSTR: ENTER "0" IF THIS ASSET IS NOT OWNED IN [CURRENT WAVE YEAR]]

 $_____, GO TO H014 BP

DK
RF

NOTE: IF R SAID BOTH RECORDS WERE INCORRECT (U002=5) AND THE RECORD THAT WAS JUST QUESTIONED AT U003 WAS FOR THE PREVIOUS WAVE, RETURN TO U003 AND ASK ABOUT THE RECORD FOR THE CURRENT WAVE. OTHERWISE, CONTINUE ON TO THE INSTRUCTION FOR THE END OF U001 LOOP.

Note: For data anlysis purposes, U003 is not always stored at the corresponding 'underscore' value, since there is an option to record U003 at prev wave year and current wave year. So, when U001_1, U003_1 = last wave amount and U003_2 = current wave amount. (Ex. When an R answered '3' at U002_3, reconciled value was stored at U003_6 and not at U003_3).

U004-
U006

Thinking about how much this [is/was] worth in [PREVIOUS WAVE YEAR/CURRENT WAVE YEAR]...

Question wording: Does it amount to less than $_____ , more than $_____ , or what?

$_____ .00

DK
RF

H014 BRANCHPOINT: IF R LIVES ON FARM/RANCH (H001=1) or R DID NOT REPORT THAT LIVES IN A MOBILE HOME (H002 NOT 1), GO TO H024

H014

Do you (or your [husband/wife/partner]) own both the mobile home and site, do you own only the home, do you rent both the home and site, or what?

1. OWN BOTH HOME & SITE
2. OWN ONLY SITE
3. OWN ONLY HOME
4. RENT BOTH………………GO TO H079
7. NEITHER OWN NOR RENT………………GO TO H086 BRANCHPOINT
DK………………GO TO H086 BRANCHPOINT
RF………………GO TO H086 BRANCHPOINT

Do you or your [husband/wife/partner] own both the mobile home and site, do you own only the home, do you rent both the home and site, or what?

1. OWN BOTH HOME & SITE
2. OWN ONLY SITE
3. OWN ONLY HOME
4. RENT BOTH………………GO TO H079
7. NEITHER OWN NOR RENT………………GO TO H086 BRANCHPOINT
DK………………GO TO H086 BRANCHPOINT
RF………………GO TO H086 BRANCHPOINT

H015		#@ OP (11/28/22) Moving H015 to H016 and changing fill #50120

The following questions refer to your [mobile home only/mobile home site only/mobile home and site].

H016

The following questions refer to your [or [your][partner/spouse/husband/wife]'s] [mobile home only/mobile home site only/mobile home and site].

#@ OP (11/28/22) Moving H015 to H016 and changing fill #50120

What is its present value? We mean, what would it bring if it were sold today?

[INSTR: DO NOT PROBE DK/RF.]

[INSTR: ENTER "0" FOR NOTHING.]

 $_____ .00 ………….. GO TO H024

DK
RF

What is its present value? We mean, what would it bring if it were sold today?

[INSTR: ENTER "0" FOR NOTHING.]

$ _____ .00 ………….. GO TO H024

DK
RF

H017

H017-H019 Unfolding Sequence
Question text:

(Thinking about the present value of your [mobile home only/mobile home site only/mobile home and site]:)

Would it amount to less than $_____ , more than $_____ , or what?

PROCEDURES: 2Up1Down, 1Up2Down
BREAKPOINTS: $5,000, $10,000, $20,000, $100,000
RANDOM ENTRY POINTS: $10,000, $20,000
ENTRY POINT ASSIGNMENT [1 ($10,000)] or [NOT 1 ($20,000)] AT X508

H017-H019 Unfolding Sequence
Question text:

Thinking about the present value of your [mobile home only/mobile home site only/mobile home and site]:

Would it amount to less than $_____ , more than $_____ , or what?

PROCEDURES: 2Up1Down, 1Up2Down
BREAKPOINTS: $5,000, $10,000, $20,000, $100,000
RANDOM ENTRY POINTS: $10,000, $20,000
ENTRY POINT ASSIGNMENT [1 ($10,000)] or [NOT 1 ($20,000)] AT X508

H024

Do you have a mortgage, land contract, second mortgage, or any other loan that uses the property as collateral?

#@ OP (5/9/22) Correcting skip #49719

Please do not include home equity lines of credit.

[INSTR: IF R SAYS THEY REFINANCED THE MORTGAGE, TREAT IT AS A MORTGAGE.]

[INSTR: SELECT ALL THAT APPLY.]

1. YES, MORTGAGE/ LAND CONTRACT
2. YES, 2ND MORTGAGE………………..GO TO ~~H036~~U001 BRANCHPOINT UNLESS 1 WAS ALSO SELECTED
3. YES, OTHER LOANS………………..GO TO ~~H036~~U001 BRANCHPOINT UNLESS 1 WAS ALSO SELECTED
4. [VOL] YES, REVERSE MORTGAGE………………..GO TO ~~H036~~U001 BRANCHPOINT
5. NO…………….. GO TO ~~H036~~U001 BRANCHPOINT
DK……………...GO TO ~~H036~~U001 BRANCHPOINT
RF……………...GO TO ~~H036~~U001 BRANCHPOINT

H025

[Banner: Payments on a First Mortgage or Land Contract]

About how much are the payments on the (first) mortgage or land contract?

[INSTR: DO NOT PROBE DK/RF.]

[INSTR: ENTER "0" FOR NOTHING, AND PRESS "NEXT" TO CONTINUE.]
⍰
 $_____ .00 ………….. GO TO H029⍰

0……………..GO TO H032
DK
RF

[Banner: Payments on a First Mortgage or Land Contract]

About how much are the payments on the first mortgage or land contract?

[INSTR: ENTER "0" FOR NOTHING, AND PRESS "NEXT" TO CONTINUE.]

 $_____ .00 ………….. GO TO H029

0……………..GO TO H032
DK
RF

H026

H026-H028 Unfolding Sequence

(Thinking about the payments on the (first) mortgage or land contract:)

Question text: Do they amount to less than $____ per month, more than $____ per month, or what?

PROCEDURES: 2Up1Down, 1Up2Down
BREAKPOINTS: $200, $350, $500, $800
RANDOM ENTRY POINTS: $350, $500
ENTRY POINT ASSIGNMENT [1 ($350)] or [NOT 1 ($500)] AT X501

Thinking about the payments on the (first) mortgage or land contract:

Question text: Do they amount to less than $_____ per month, more than $_____ per month, or what?

PROCEDURES: 2Up1Down, 1Up2Down
BREAKPOINTS: $200, $350, $500, $800
RANDOM ENTRY POINTS: $350, $500
ENTRY POINT ASSIGNMENT [1 ($350)] or [NOT 1 ($500)] AT X501

H029 BRANCHPOINT: GO TO H031

H029

(About how much are the payments on the (first) mortgage or land contract?)

[INSTR: DO NOT PROBE DK/RF.]

Per:

1. WEEK
2. 2 X MONTH
3. MONTH
4. QUARTER
5. 6 MONTH
6. YEAR
7. OTHER (SPECIFY) H030S_____
DK
RF

About how much are the payments on the first mortgage or land contract?

Per:

1. WEEK
2. 2 X MONTH
3. MONTH
4. QUARTER
5. 6 MONTH
6. YEAR
7. OTHER (SPECIFY) H030S_____
DK
RF

H031

[Banner: Payments on a First Mortgage or Land Contract]

Do the payments include property taxes or insurance?

(Which?)

1. TAXES ONLY▯
2. INSURANCE ONLY▯
3. BOTH▯
5. NO, NEITHER
DK
RF

H032

About how much do you still owe on the (mortgage/land contract)?

[INSTR: DO NOT PROBE DK/RF.]

[INSTR: ENTER "0" FOR NOTHING.]

 $ _____ .00 ………….. GO TO ~~H036~~ U001 BRANCHPOINT

DK
RF

H033

Thinking about what you still owe on the (mortgage/land contract:)

Question text: Does it amount to less than $____ , more than $____ , or what?

PROCEDURES: 2up, 1Up1Down, 2Down
BREAKPOINTS: $5,000, $20,000, $100,000
RANDOM ENTRY POINTS: $5,000, $20,000, $100,000
ENTRY POINT ASSIGNMENT [1 ($5,000)] or [2 ($20,000)] or
[{NOT 1 and NOT 2} ($100,000)] AT X511

U001 BRANCHPOINT:

ASK IF FOLLOWING CONDITIONS ARE MET:

R HAS NOT MOVED (X033 = 5) AND LIVING R (A007 = 1)

AND PREVIOUS WAVE FINANCIAL INTERVIEW TOOK PLACE IN PREVIOUS WAVE (X039 >= 2020)

AND THIS IS A REINTERVIW HH (X024 = 1)

AND <u>SAME</u> FINANCIAL REPORTER AS LAST WAVE (X007 = 1 OR 3 AND X077 = 1 OR 3)

AND (SELF LAST WAVE AND SELF THIS WAVE (A009 = 1 AND Z095_2 = 1) OR PROXY LAST WAVE AND SAME PROXY THIS WAVE (A009 = 2 OR A009 = 3 OR A009 = 4) AND (A010 =1))

AND ASSET LEVEL THRESHOLD IS MET:

DIFFERENCE BETWEEN WAVES IS <u>GREATER THAN OR EQUAL TO</u> $50,000

   (MIN CW - MAX PW) OR (MIN PW - MAX CW) >= $50,000

   (H032 (or H033 if UNF) – Z158) or (Z157 - H032 (or H034 if UNF)) >= $50,000)

AND

DIFFERENCE BETWEEN WAVES IS <u>GREATER THAN</u> THE MIN OF PREVIOUS WAVE OR MIN OF CURRENT WAVE

   (MIN CW - MAX PW) OR (MIN PW - MAX CW) > (MIN PW OR MIN CW)

   (H032 (or H033 if UNF) – Z158) > Z157 OR (H032 (or H033 if UNF)

        OR

   (Z157 - H032 (or H034 if UNF)) > Z157 OR (H032 (or H033 if UNF)

ELSE, GO TO H036 BRANCHPOINT

NOTE: SEE APPENDIX FOR MORE DETAILS ON CALCULATION AND DATA ANALYSIS

U001

#@ BJ (11/29/21) Adding in asset rec, #48859

IF THE RESPONDENT HAS HAD A FIRST mortgage OR LAND CONTRACT ON PRIMARY RESIDENCE IN BOTH, THE PREVIOUS AND THE CURRENT INTERVIEW YEAR:
According to our records, in [PREVIOUS WAVE YEAR] you had a first mortgage or land contract on your primary residence on which you owed [about/less than/more than] [AMOUNT] Now you owe [about/less than/more than] [AMOUNT].

IF THE RESPONDENT HAS HAD A FIRST mortgage OR LAND CONTRACT ON PRIMARY RESIDENCE ONLY IN THE CURRENT INTERVIEW YEAR:
According to our records, you currently have a first mortgage or land contract on your primary residence on which you owe [about/less than/more than] [AMOUNT]. In [PREVIOUS WAVE YEAR] you did not have it.

IF THE RESPONDENT HAS HAD THE ASSET ONLY IN THE PREVIOUS INTERVIEW YEAR:
According to our records, in [PREVIOUS WAVE YEAR] you had a first mortgage or land contract on your primary residence on which you owed [about/less than/more than] [AMOUNT] Now you do not owe anything on it.

ALL RESPONDENTS:
Does this sound right?

[INSTR: ENTER RF TO EXIT ASSET VERIFICATION.]

IF THE RESPONDENT HAS HAD A FIRST mortgage OR LAND CONTRACT ON PRIMARY RESIDENCE IN BOTH, THE PREVIOUS AND THE CURRENT INTERVIEW YEAR:
According to our records, in [PREVIOUS WAVE YEAR] you had a first mortgage or land contract on your primary residence on which you owed [about/less than/more than] [AMOUNT] Now you owe [about/less than/more than] [AMOUNT].

IF THE RESPONDENT HAS HAD A FIRST mortgage OR LAND CONTRACT ON PRIMARY RESIDENCE ONLY IN THE CURRENT INTERVIEW YEAR:
According to our records, you currently have a first mortgage or land contract on your primary residence on which you owe [about/less than/more than] [AMOUNT]. In [PREVIOUS WAVE YEAR] you did not have it.

IF THE RESPONDENT HAS HAD THE ASSET ONLY IN THE PREVIOUS INTERVIEW YEAR:
According to our records, in [PREVIOUS WAVE YEAR] you had a first mortgage or land contract on your primary residence on which you owed [about/less than/more than] [AMOUNT] Now you do not owe anything on it.

ALL RESPONDENTS:
Does this sound right?

[INSTR: ENTER RF TO EXIT ASSET VERIFICATION.]

1. YES ………………. GO TO ~~Q321~~H036 BRANCHPOINT   #@ OP (5/9/22) Correcting skip
5. NO   #49720
DK ………………. GO TO ~~Q321~~H036 BRANCHPOINT
RF ………………. GO TO ~~Q321~~H036 BRANCHPOINT

U002

Which record is wrong, the [PREVIOUS WAVE YEAR] or the [CURRENT WAVE   #@ OP (5/9/22) Correcting skip
YEAR] report?   #49720

1. PREVIOUS WAVE
3. CURRENT WAVE
5. BOTH
DK ………………. GO TO ~~Q321~~H036 BRANCHPOINT
RF ……………….   GO TO ~~Q321~~H036 BRANCHPOINT

U003

About how much [did/do you] owe in [PREVIOUS WAVE YEAR/CURRENT WAVE YEAR]?

IF PREVIOUS WAVE THEN USE THIS INSTRUCTION:
[INSTR: ENTER "0" IF THIS DEBT [WAS/IS] NOT OWED IN [PREVIOUS WAVE YEAR/CURRENT WAVE YEAR]

[IWER: DO NOT PROBE DK/RF]

$_____, GO TO ~~Q321~~H036 BRANCHPOINT

DK
RF

NOTE: IF R SAID BOTH RECORDS WERE INCORRECT (U002=5) AND THE RECORD THAT WAS JUST QUESTIONED AT U003 WAS FOR THE PREVIOUS WAVE, RETURN TO U003 AND ASK ABOUT THE RECORD FOR THE CURRENT WAVE. OTHERWISE, CONTINUE ON TO THE INSTRUCTION FOR THE END OF U001 LOOP.

#@ OP (5/9/22) Correcting skip #49720

Note: For data anlysis purposes, U003 is not always stored at the corresponding 'underscore' value, since there is an option to record U003 at prev wave year and current wave year. So, when U001_1, U003_1 = last wave amount and U003_2 = current wave amount. (Ex. When an R answered '3' at U002_3, reconciled value was stored at U003_6 and not at U003_3).

U004-
U006

Thinking about how much these were worth in [PREVIOUS WAVE YEAR/CURRENT WAVE YEAR]...

Question wording: Does it amount to less than $____ , more than $____ , or what?

$_____ .00

DK
RF

H036

About how much are the payments on your second mortgage?

[INSTR: DO NOT PROBE DK/RF.]

[INSTR: ENTER "0" FOR NOTHING, AND PRESS "NEXT" TO CONTINUE.]

$ _____ .00 ………….. GO TO H040

0………………..GO TO H042
DK
RF

About how much are the payments on your second mortgage?

[INSTR: ENTER "0" FOR NOTHING, AND PRESS "NEXT" TO CONTINUE.]

 $ _____ .00 ………….. GO TO H040

0………………..GO TO H042
DK
RF

H037

H037-H039 Unfolding Sequence

(Thinking about the payments on your second mortgage:)

Question text: Do they amount to less than $____ per month, more than $____ per month, or what?

PROCEDURE: 2Up1Down
BREAKPOINTS: $100, $200, $300, $450
ENTRY POINT: $200

Thinking about the payments on your second mortgage:

Question text: Do they amount to less than $_____ per month, more than $_____ per month, or what?

PROCEDURE: 2Up1Down
BREAKPOINTS: $100, $200, $300, $450
ENTRY POINT: $200

H040 BRANCHPOINT: GO TO H042

H040

(About how much are the payments on your second mortgage?)

Per:

1. WEEK
2. 2 X MONTH
3. MONTH
4. QUARTER
5. 6 MONTH
6. YEAR
7. OTHER (SPECIFY) H041S_____
DK
RF

H042

About how much do you still owe on that second mortgage?

[INSTR: DO NOT PROBE DK/RF.]

[INSTR: ENTER "0" FOR NOTHING.]

$_____ .00 ………….. GO TO H046 BRANCHPOINT

DK
RF
About how much do you still owe on that second mortgage?

[INSTR: ENTER "0" FOR NOTHING.]

$_____ .00 ………….. GO TO H046 BRANCHPOINT

DK
RF

H043

H043-H045 Unfolding Sequence

(Thinking about what you still owe on that second mortgage:)

Question text: Does it amount to less than $_____ , more than $_____ , or what?

PROCEDURE: 1Up1Down
BREAKPOINTS: $5,000, $20,000, $100,000
ENTRY POINT: $20,000
H043-H045 Unfolding Sequence

Thinking about what you still owe on that second mortgage:

Question text: Does it amount to less than $_____ , more than $_____ , or what?

PROCEDURE: 1Up1Down
BREAKPOINTS: $5,000, $20,000, $100,000
ENTRY POINT: $20,000

H046 BRANCHPOINT: IF R DID NOT REPORT THAT HAS OTHER LOANS (H024 NOT 3), GO TO H056

H046

About how much are the payments on that (other) loan?

[INSTR: DO NOT PROBE DK/RF.]

[INSTR: ENTER "0" FOR NOTHING, AND PRESS "NEXT" TO CONTINUE.]

$ _____ .00 ………….. GO TO H050

0……………...GO TO H052
DK
RF

About how much are the payments on that other loan?

[INSTR: ENTER "0" FOR NOTHING, AND PRESS "NEXT" TO CONTINUE.]

$ _____ .00 ………….. GO TO H050

0……………...GO TO H052
DK
RF

H047

H047-H049 Unfolding Sequence

Thinking about the payments on that (other) loan:

Question text: Do they amount to less than $____ per month, more than $____ per month, or what?

PROCEDURE: 2Up1Down
BREAKPOINTS: $150, $300, $350, $500
ENTRY POINT: $300

H047-H049 Unfolding Sequence

Thinking about the payments on that other loan:

Question text: Do they amount to less than $____ per month, more than $____ per month, or what?

PROCEDURE: 2Up1Down
BREAKPOINTS: $150, $300, $350, $500
ENTRY POINT: $300

H050 BRANCHPOINT: GO TO H052

H050

(About how much are the payments on that (other) loan?)

[INSTR: DO NOT PROBE DK/RF.]

Per:

1. WEEK
2. 2 X MONTH
3. MONTH
4. QUARTER
5. 6 MONTH
6. YEAR
7. OTHER (SPECIFY) H051S_____
DK
RF

About how much are the payments on that other loan?

Per:

1. WEEK
2. 2 X MONTH
3. MONTH
4. QUARTER
5. 6 MONTH
6. YEAR
7. OTHER (SPECIFY) H051S_____
DK
RF

H052

About how much do you still owe on that loan?

[INSTR: DO NOT PROBE DK/RF.]

[INSTR: ENTER "0" FOR NOTHING.]

$_____ .00 ………….. GO TO H056

DK
RF
About how much do you still owe on that loan?

[INSTR: ENTER "0" FOR NOTHING.]

$_____ .00 ………….. GO TO H056

DK
RF

H053

H053-H055 Unfolding Sequence

(Thinking about how much you still owe on that loan:)

Question text: Does it amount to less than $_____ , more than $_____ , or what?

PROCEDURE: 1Up1Down
BREAKPOINTS: $5,000, $20,000, $100,000
ENTRY POINT: $20,000

Thinking about how much you still owe on that loan:

Question text: Does it amount to less than $_____ , more than $_____ , or what?

PROCEDURE: 1Up1Down
BREAKPOINTS: $5,000, $20,000, $100,000
ENTRY POINT: $20,000

H056

Do you (or your [husband/wife/partner]) have a home equity line of credit?

DEFINITION: By "home equity line of credit" we mean a line of credit obtained by using the equity in one's home as security.

1. YES
5. NO……………...GO TO H066 BRANCHPOINT
DK……………...GO TO H066 BRANCHPOINT
RF……………...GO TO H066 BRANCHPOINT

Do you or your [husband/wife/partner] have a home equity line of credit?

DEFINITION: By home equity line of credit we mean a line of credit obtained by using the equity in one's home as security.

1. YES
5. NO……………...GO TO H066 BRANCHPOINT
DK……………...GO TO H066 BRANCHPOINT
RF……………...GO TO H066 BRANCHPOINT

H057

[Banner: Home Equity Line of Credit]

What is the maximum amount you could borrow on this line of credit?

[INSTR: DO NOT PROBE DK/RF.]

[INSTR: ENTER "0" FOR NOTHING.]

$ _____ .00 ………….. GO TO H061

DK
RF

[Banner: Home Equity Line of Credit]

What is the maximum amount you could borrow on this line of credit?

[INSTR: ENTER "0" FOR NOTHING.]

$_____ .00 ………….. GO TO H061

DK
RF

H058

H058-H060 Unfolding Sequence

(Thinking about the maximum amount you could borrow on this line of credit:)

Question text: Would it amount to less than $____ , more than $____ , or what?

PROCEDURES: 2Up1Down, 1Up2Down
BREAKPOINTS: $25,000, $60,000, $100,000, $250,000
RANDOM ENTRY POINTS: $60,000, $100,000,
ENTRY POINT ASSIGNMENT [1 ($60,000)] or [NOT 1 ($100,000)] AT X502

H058-H060 Unfolding Sequence

Thinking about the maximum amount you could borrow on this line of credit:

Question text: Would it amount to less than $____ , more than $____ , or what?

PROCEDURES: 2Up1Down, 1Up2Down
BREAKPOINTS: $25,000, $60,000, $100,000, $250,000
RANDOM ENTRY POINTS: $60,000, $100,000,
ENTRY POINT ASSIGNMENT [1 ($60,000)] or [NOT 1 ($100,000)] AT X502

H061

[Banner: Home Equity Line of Credit]

Do you currently have a loan against this line of credit?

1. YES
5. NO……………...GO TO H066 BRANCHPOINT
DK……………...GO TO H066 BRANCHPOINT
RF……………...GO TO H066 BRANCHPOINT

H062

[Banner: Home Equity Line of Credit]

About how much is currently owed?

[INSTR: DO NOT PROBE DK/RF.]

[INSTR: ENTER "0" FOR NOTHING.]

 $_____ .00 ………….. GO TO H066 BRANCHPOINT

DK
RF
H063

H063-H065 Unfolding Sequence

(Thinking about what is currently owed on the loan against this line of credit:)

Question text: Does it amount to less than $____ , more than $____ , or what?

PROCEDURES: 2Up1Down, 1Up2Down
BREAKPOINTS: $12,000, $30,000, $50,000, $75,000
RANDOM ENTRY POINTS: $30,000, $50,000,
ENTRY POINT ASSIGNMENT [1 ($30,000)] or [NOT 1 ($50,000)] AT X503

H066

What was the purchase price of your home?

[INSTR: DO NOT PROBE DK/RF]

[INSTR: IF R SAYS GIFT OR INHERITANCE, ASK VALUE WHEN RECEIVED.]

[INSTR: ENTER "0" FOR NOTHING.]

 $_____ .00 ………….. GO TO H070

DK
RF

What was the purchase price of your home?

[INSTR: IF THE HOME WAS A GIFT OR AN INHERITANCE, PLEASE REPORT ITS VALUE WHEN YOU RECEIVED IT.]

[INSTR: ENTER "0" FOR NOTHING.]

$_____ .00 ………….. GO TO H070

DK
RF

H067

H067-H069 Unfolding Sequence

(Thinking about the purchase price of your home:)

Question text: Was it less than $____ , more than $____ , or what?

PROCEDURES: 3Up1Down, 2Up2Down, 1Up3Down
BREAKPOINTS: $1,500, $15,000, $40,000, $80,000, $175,000
RANDOM ENTRY POINTS: $15,000, $40,000, $80,000
ENTRY POINT ASSIGNMENT [1 ($15,000)] or [2 ($40,000)] or
[{NOT 1 and NOT 2} ($80,000)] AT X512

Thinking about the purchase price of your home:

Question text: Was it less than $_____ , more than $_____ , or what?

PROCEDURES: 3Up1Down, 2Up2Down, 1Up3Down
BREAKPOINTS: $1,500, $15,000, $40,000, $80,000, $175,000
RANDOM ENTRY POINTS: $15,000, $40,000, $80,000
ENTRY POINT ASSIGNMENT [1 ($15,000)] or [2 ($40,000)] or
[{NOT 1 and NOT 2} ($80,000)] AT X512

H070

[Banner: Main Residence]

In what year did you acquire it?

YEAR_____ YYYY

DK
RF

H071 BRANCHPOINT: IF THIS IS A REINTERVIEW HH and HH HAS NOT CHANGED MAIN RESIDENCE SINCE HH's LAST IW (X033=5) and ALTERNATE WAVE FLAG IS NOT SET TO ASK QUESTIONS (H202>0), GO TO H075

NOTE: QUESTIONS H071 THROUGH H074 ARE ALWAYS ASKED OF NEW INTERVIEW HHs. THEY ARE ASKED OF REINTERVIEW HHs WHEN THE HH's MAIN HOME IS DIFFERENT FROM THAT OF THE PREVIOUS WAVE. OTHERWISE, FOR HHs THAT STILL HAVE THE SAME MAIN HOME AS LAST WAVE, THEY ARE ASKED ONLY IN ALTERNATE WAVES. THEY WERE ASKED OF REINTERVIEW HHs IN THE ~~2016~~ 2020 WAVE WILL BE ASKED AGAIN IN ~~2020.~~ 2024

H071

[Banner: Main Residence: Names Listed on the Deed]

Does the deed to your home have anyone's name on it besides yours (or your [husband/wife/partner]'s)?

1. YES
5. NO……………..GO TO H075
DK……………...GO TO H075
RF……………...GO TO H075

Does the deed to your home have anyone's name on it besides yours or your [husband/wife/partner]'s?

1. YES
5. NO………………GO TO H075
DK………………GO TO H075
RF………………GO TO H075

H072

[Banner: Main Residence: Names Listed on the Deed]

What is that person's relationship to you (or your [husband/wife/partner])?

[INSTR: IF 'TRUST' IS MENTIONED, ENTER RELATIONSHIP OF TRUST BENEFICIARIES.]

[INSTR: SELECT ALL THAT APPLY.]

1. CHILD
2. CHILD-IN-LAW
3. GRANDCHILD
4. PARENT
5. OTHER RELATIVE (SPECIFY)
6. OTHER PERSON (INCLUDING EX-SPOUSE)
7. ORGANIZATION OR INSTITUTION
DK
RF

[Banner:Main Residence: Names Listed on the Deed]

What is that person's relationship to you or your [husband/wife/partner]?

[INSTR: IF YOUR HOME IS INCLUDED IN A TRUST, PLEASE INDICATE THE RELATIONSHIP OF THE BENEFICIARIES OF THAT TRUST.]

[INSTR: SELECT ALL THAT APPLY.]

1. CHILD
2. CHILD-IN-LAW
3. GRANDCHILD
4. PARENT
5. OTHER RELATIVE (SPECIFY)
6. OTHER PERSON (INCLUDING EX-SPOUSE)
7. ORGANIZATION OR INSTITUTION
DK
RF

H073 BRANCHPOINT: IF H072 INCLUDES OTHER RELATIVE (H072 = 5), CONTINUE

ELSE GO TO H194 BRANCHPOINT

H073S

OTHER RELATIVE (SPECIFY)

OPEN_____

What is that other relative's relationship to you or your [husband/wife/partner]?

OPEN_____

H194 BRANCHPOINT: IF H072 INCLUDES OTHER PERSON (H072 =6), CONTINUE

ELSE, GO TO H198_H074 BRANCHPOINT

H194S

OTHER PERSON (SPECIFY)

OPEN_____

What is that other person's relationship to you or your [husband/wife/partner]?

OPEN_____

H198_H074 BRANCHPOINT: IF H072 INCLUDES CHILD, CHILD-IN-LAW, OR GRANDCHILD (H072=1 OR 2 OR 3), CONTINUE

ELSE, GO TO H075

H198_H
074_te
mp

[Banner:Main Residence: Names Listed on the Deed]

IF CHILD (H072=1):
Which child or children is that?

ELSE, IF CHILD-IN-LAW (H072=2, OR 2 AND 3):
Which of your children is married to (him/her)?

ELSE, IF GRANDCHILD (H072=3):
Which of your children is the parent of that grandchild or grandchildren?

[INSTR: SELECT ALL THAT APPLY.]

CHILD NAME(S)[DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]
03. THROUGH 52. CHILD NAME(S)
[ROWS PROVIDED BY BLAISE AS NECESSARY]
92. UNLISTED CHILD WHO IS DECEASED
93. ALL CHILDREN
DK
RF

NOTE: NAMES OF CHILDREN (per X058) ARE DISPLAYED. THE IWER MAY SELECT AS MANY NAMES AS APPLY, AS WELL AS "UNLISTED CHILD WHO IS DECEASED

[Banner:Main Residence:Names Listed on the Deed]

IF CHILD (H072=1):
Which child or children is that?

ELSE, IF CHILD-IN-LAW (H072=2 OR 2 AND 3):
Which of your children is married to him or her?

ELSE, IF GRANDCHILD (H072=3):
Which of your children is the parent of that grandchild or grandchildren?

[INSTR: SELECT ALL THAT APPLY.]

CHILD NAME(S) [DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]
03. THROUGH 52. CHILD NAME(S)
[ROWS PROVIDED BY BLAISE AS NECESSARY]
92. UNLISTED CHILD WHO IS DECEASED
93. ALL CHILDREN
DK
RF

NOTE: NAMES OF CHILDREN (per X058) ARE DISPLAYED. THE IWER MAY SELECT AS MANY NAMES AS APPLY, AS WELL AS "UNLISTED CHILD WHO IS DECEASED"

H075_

What were the real estate taxes in LAST CALENDAR YEAR (per InitA061TLCY) on this home?

[INSTR: IF R CANNOT SAY BECAUSE INCLUDED IN MORTGAGE OR FEES, ENTER DK.]

[INSTR: DO NOT PROBE DK/RF.]

[INSTR: ENTER "0" FOR NOTHING.]

$ _____ .00 ………….. GO TO H079 BRANCHPOINT

DK
RF
What were the real estate taxes in LAST CALENDAR YEAR (per InitA061TLCY) on this home?

[INSTR: ENTER "0" FOR NOTHING.]

 $_____ .00 ………….. GO TO H079 BRANCHPOINT

DK
RF

H076

H076-H078 Unfolding Sequence

(Thinking about the real estate taxes in LAST CALENDAR YEAR (per
InitA061TLCY) on this home:)

Question text: Did they amount to less than $_____ , more than $_____ , or
what?

PROCEDURES: 2Up, 1Up1Down, 2Down
BREAKPOINTS: $500, $2,000, $7,500
RANDOM ENTRY POINTS: $500, $2,000, $7,500
ENTRY POINT ASSIGNMENT [1 ($500)] or [2 ($2,000)] or
[{NOT 1 and NOT 2} ($7,500)] AT X513

H076-H078 Unfolding Sequence

Thinking about the real estate taxes in LAST CALENDAR YEAR (per
InitA061TLCY) on this home:

Question text: Did they amount to less than $_____ , more than $_____ , or
what?

PROCEDURES: 2Up, 1Up1Down, 2Down
BREAKPOINTS: $500, $2,000, $7,500
RANDOM ENTRY POINTS: $500, $2,000, $7,500
ENTRY POINT ASSIGNMENT [1 ($500)] or [2 ($2,000)] or
[{NOT 1 and NOT 2} ($7,500)] AT X513

H079 BRANCHPOINT: IF R OWNS {BOTH MOBILE HOME AND SITE} (H014=1),
GO TO H100

IF R OWNS OWN HOME ({H004 or H008 or H011}=1) or {LIVES IN
FARMHOUSE BUT {DOES NOT PAY RENT ON IT or DK or RF (H012={5 or 8 or
9})}, GO TO H100

H079

IF OWNS MOBILE HOME BUT NOT SITE (H014=3):
About how much rent do you pay (on the mobile home site)?

OTHERWISE:
About how much rent do you pay?

[INSTR: ENTER "0" FOR NOTHING]

[INSTR: DO NOT PROBE DK/RF.]

$_____ .00 ………….. GO TO H083

0……………..GO TO H086 BRANCHPOINT
DK
RF

IF OWNS MOBILE HOME BUT NOT SITE (H014=3):
About how much rent do you pay on the mobile home site?

OTHERWISE:
About how much rent do you pay?

[INSTR: ENTER "0" FOR NOTHING, AND PRESS "NEXT" TO CONTINUE.]

$_____ .00 ………….. GO TO H083

0……………..GO TO H086 BRANCHPOINT
DK
RF

H080

H080-H082 Unfolding Sequence

(Thinking about the rent you pay:)

Question text: Does it amount to less than $____ per month, more than
$____ per month, or what?

PROCEDURES: 2Up, 1Up1Down, 2Down
BREAKPOINTS: $200, $500, $1,000
RANDOM ENTRY POINTS: $200, $500, $1,000
ENTRY POINT ASSIGNMENT [1 ($200)] or [2 ($500)] or
[{NOT 1 and NOT 2} ($1,000)] AT X514

Thinking about the rent you pay:

Question text: Does it amount to less than $_____ per month, more than $_____ per month, or what?

PROCEDURES: 2Up, 1Up1Down, 2Down
BREAKPOINTS: $200, $500, $1,000
RANDOM ENTRY POINTS: $200, $500, $1,000
ENTRY POINT ASSIGNMENT [1 ($200)] or [2 ($500)] or
[{NOT 1 and NOT 2} ($1,000)] AT X514

H083 BRANCHPOINT: GO TO H086 BRANCHPOINT

H083

(About how much rent do you pay (on the mobile home site)?)

[INSTR: DO NOT PROBE DK/RF.]

Per:

1. WEEK
2. 2 X MONTH
3. MONTH
4. QUARTER
5. 6 MONTH
6. YEAR
7. OTHER (SPECIFY) H084S_____
DK
RF
About how much rent do you pay on the mobile home site?

Per:

1. WEEK
2. 2 X MONTH
3. MONTH
4. QUARTER
5. 6 MONTH
6. YEAR
7. OTHER (SPECIFY) H084S_____
DK
RF

H086 BRANCHPOINT: IF THIS IS A REINTERVIEW HH and HH HAS NOT CHANGED MAIN RESIDENCE SINCE HH's LAST IW (X033=5), GO TO H100

IF R DOES NOT RENT HOME {(H004 NOT 2) and (H008 NOT 3) and (H012 NOT 1) and (H014 {NOT 2 and NOT 4})}, GO TO H087 BRANCHPOINT

H086

Are heat and electricity included in your rent?

[INSTR: PROBE FOR WHICH.]

1. YES, BOTH
2. HEAT ONLY
3. ELECTRICITY ONLY
5. NO, NEITHER
DK
RF

Are heat and electricity included in your rent?

1. YES, BOTH
2. HEAT ONLY
3. ELECTRICITY ONLY
5. NO, NEITHER
DK
RF

H087 BRANCHPOINT:

IF R'S LIVING ARRANGEMENTS ARE ALREADY ESTABLISHED {(H004={1 or 2 or 3}) AND (H008={1 or 2 or 3 or empty}) AND (H014={1 or 2 or 3 or 4 or empty})
OR
(H008={1 or 2 or 3} AND {(H004={1 or 2 or 3 or empty}) AND (H014={1 or 2 or 3 or 4 or empty}
OR
(H014={1 or 2 or 3 or 4} AND {(H004={1 or 2 or 3 or empty}) AND (H008={1 or 2 or 3 or empty}) GO TO H100

IF R LIVES ON FARM/RANCH (H001=1), GO TO H088

ELSE, CONTINUE

H087

Is your [house or apartment/house] in MAIN RESIDENCE CITY, STATE (STATE ABBREVIATION) part of a public or subsidized housing complex?

1. YES
5. NO
DK
RF

H088

[INSTR: ASK IF NOT CLEAR (I.E., IF NOT ALREADY KNOWN BY INTERVIEWER):]
Is your [mobile home site/home] owned by a relative?

1. YES
5. NO……………..GO TO H092
DK……………...GO TO H092
RF……………...GO TO H092

Is your [mobile home site/home] owned by a relative?

1. YES
5. NO……………..GO TO H092
DK……………...GO TO H092
RF……………...GO TO H092

H089

[Banner: Owner of [Mobile Home Site/Home]

What is that person's relationship to you (or your [husband/wife/partner])?

[INSTR: IF 'TRUST' IS MENTIONED, ENTER RELATIONSHIP OF TRUST BENEFICIARIES.]

[INSTR: SELECT ALL THAT APPLY.]

1. CHILD
2. CHILD-IN-LAW
3. GRANDCHILD
4. PARENT
5. OTHER RELATIVE (SPECIFY)
6. OTHER PERSON (INCLUDING EX-SPOUSE)
7. ORGANIZATION OR INSTITUTION
DK
RF

[Banner: Owner of [Mobile Home Site/Home]

What is that person's relationship to you or your [husband/wife/partner]?

[INSTR: IF YOUR HOME IS INCLUDED IN A TRUST PLEASE INDICATE THE RELATIONSHIP OF THE BENEFICIARIES OF THAT TRUST.]

[INSTR: SELECT ALL THAT APPLY.]

1. CHILD
2. CHILD-IN-LAW
3. GRANDCHILD
4. PARENT
5. OTHER RELATIVE (SPECIFY)
6. OTHER PERSON (INCLUDING EX-SPOUSE)
7. ORGANIZATION OR INSTITUTION
DK
RF

H090 BRANCHPOINT: IF H089 INCLUDES OTHER RELATIVE (H089 = 5), CONTINUE
ELSE, GO TO H195 BRANCHPOINT

H090S

OTHER RELATIVE (SPECIFY)

OPEN_____

What is that other relative's relationship to you or your [husband/wife/partner]?

OPEN_____

H195 BRANCHPOINT: IF H089 INCLUDES OTHER PERSON (H089 = 6), CONTINUE
ELSE, GO TO H091

H195S

OTHER PERSON (SPECIFY)

OPEN_____
What is that other person's relationship to you or your [husband/wife/partner]?

OPEN_____

H199_H
091_Te
mp

[Banner: Owner of [Mobile Home Site/Home]

IF CHILD (H089=1):
Which child or children is that?

IF CHILD-IN-LAW (H089=2, OR 2 AND 3):
Which of your children is married to [him/her]?

IF GRANDCHILD (H089=3):
Which of your children is the parent of that grandchild or grandchildren?

[INSTR: SELECT ALL THAT APPLY.]

CHILD NAME(S)[DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]
03. THROUGH 52. CHILD NAME(S)
[ROWS PROVIDED BY BLAISE AS NECESSARY]
92. UNLISTED CHILD WHO IS DECEASED
93. ALL CHILDREN
DK
RF

NOTE: NAMES OF CHILDREN ARE DISPLAYED. THE IWER MAY SELECT AS MANY NAMES AS APPLY, AS WELL AS "UNLISTED CHILD WHO IS DECEASED"

H092

[Banner: Owner of [Mobile Home Site/Home]

Did you ever own this [mobile home site/home]?

1. YES
5. NO
DK
RF

H100   #@ BJ (9/13/21) Added
                                                         instruction #48322

[INSTR: ASK OR RECORD.]

Is your [house or apartment/house] part of a condominium, co-op, or housing association?

[INSTR: GOVERNMENT SUBSIDIZED HOUSING, OR SECTION 8, IS NOT CONSIDERED PART OF A HOUSING ASSOCIATION.]

1. YES
5. NO
DK
RF

Is your [house or apartment/house/apartment] part of a condominium, co-op, or housing association?

[INSTR: GOVERNMENT SUBSIDIZED HOUSING, OR SECTION 8, IS NOT CONSIDERED PART OF A HOUSING ASSOCIATION.]

1. YES
5. NO
DK
RF

H101 BRANCHPOINT: ASK IF ALT WAVE IS SET TO ASK (H209 = 0)

ASK IF A237 = (4, 7, 8, 9, 10)
OR IF A237 = (2, 3, 5, OR 6) ASSIGN "1" FOR H101 AND GO TO H102
OR ASK IF ALT WAVE IS NOT SET TO ASK (H209 = 1), AND HH HAS CHANGED MAIN RESIDENCE SINCE HH's LAST IW (X033 = 1 or 3) AND R DOES NOT LIVE IN A NURSING HOME (A028 = 5)

ELSE GO TO H102 BRANCHPOINT

Note: After 2018, we moved to an every 3 wave sequence for non-movers. So the next time H101 would be asked of everyone is 2024.

H101

[INSTR: ASK OR RECORD.]

Is your [house or apartment/house] part of a retirement community, senior citizens' housing, assisted living, or some other type of housing that offers services for older adults or someone with a disability?

[INSTR: ENTER 'No' IF R VOLUNTEERS THAT NO SERVICES ARE OFFERED OTHER THAN MAINTENANCE.]

1. YES
5. NO
7. YES, OTHER (SPECIFY) H196S_____
DK
RF

Is your [house or apartment/house] part of a retirement community, senior citizens' housing, assisted living, or some other type of housing that offers services for older adults or someone with a disability?

[INSTR: PLEASE SELECT 'No' IF NO SERVICES ARE OFFERED OTHER THAN MAINTENANCE.]

1. YES
5. NO
7. YES, OTHER (SPECIFY) H196S_____
DK
RF

H102 BRANCHPOINT: IF R DID NOT REPORT THAT LIVES IN CONDO/CO-OP/HOUSING ASSOCIATION (H100 NOT 1) and R DID NOT REPORT THAT LIVES IN RETIREMENT/SENIOR CITIZEN/OTHER HOUSING WITH SERVICES (H101={NOT 1 and NOT 7}), GO TO H135 BRANCHPOINT

H102

IF A237 = (2, 3, 5, OR 6):
Earlier you said your house or apartment is part of a retirement community, senior citizens' housing, assisted living, or some other type of housing that offers services for older adults (or someone with a disability).

ASK ALL:
Did you have to make a lump-sum payment to join the community or association?

ASK ALL:
Did you have to make a lump-sum payment to join the community or association?

1. YES
5. NO………………..GO TO H108
DK………………GO TO H108
RF………………..GO TO H108

H103

[Banner: Community or Association Lump-Sum Payment]

About how much was that?

[INSTR: DO NOT PROBE DK/RF.]

[INSTR: ENTER "0" FOR NOTHING.]

$_____ .00 ………….. GO TO H108

DK
RF
[Banner: Community or Association Lump-Sum Payment]

About how much was that?

[INSTR: ENTER "0" FOR NOTHING.]

 $_____ .00 ………….. GO TO H108

DK
RF

H104

H104-H106 Unfolding Sequence

(Thinking about that lump-sum payment:)

Question text: Did it amount to less than $____ , more than $____ , or what?

PROCEDURE: 1Up1Down
BREAKPOINTS: $10,000, $50,000, $200,000
ENTRY POINT: $50,000

Thinking about that lump-sum payment:

Question text: Did it amount to less than $_____ , more than $_____ , or what?

PROCEDURE: 1Up1Down
BREAKPOINTS: $10,000, $50,000, $200,000
ENTRY POINT: $50,000

H108_

Aside from any rent or mortgage payments, do you pay a fee for being part of the association?

1. YES
5. NO……………..GO TO H135 BRANCHPOINT
DK……………...GO TO H135 BRANCHPOINT
RF……………...GO TO H135 BRANCHPOINT

H109_

[Banner: Association Fee]

About how much is that?

[INSTR: DO NOT PROBE DK/RF.]

[INSTR: ENTER "0" FOR NOTHING, AND PRESS "NEXT" TO CONTINUE.]

$_____ .00 ………….. GO TO H110

0……………...GO TO H135 BRANCHPOINT
DK
RF

[Banner: Association Fee]

About how much is that?

[INSTR: ENTER "0" FOR NOTHING, AND PRESS "NEXT" TO CONTINUE.]

$_____ .00 ………….. GO TO H110

0……………...GO TO H135 BRANCHPOINT
DK
RF

H112

H112-H114 Unfolding Sequence

(Thinking about the fee you pay for being part of the association:)

Question text: Does it amount to less than $____ per month, more than $____ per month, or what?

PROCEDURE: 1Up1Down
BREAKPOINTS: $100, $300, $1,000
ENTRY POINT: $300

H110 BRANCHPOINT: GO TO H135 BRANCHPOINT

H110

(About how much is that?)

[INSTR: DO NOT PROBE DK/RF.]

PER:

1. WEEK
2. 2 X MONTH
3. MONTH
4. QUARTER
5. 6 MONTH
6. YEAR
7. OTHER (SPECIFY) H111S_____
DK
RF

About how much is that?

PER:

1. WEEK
2. 2 X MONTH
3. MONTH
4. QUARTER
5. 6 MONTH
6. YEAR
7. OTHER (SPECIFY) H111S_____
DK
RF

H135 BRANCHPOINT: IF R LIVES IN MOBILE HOME (H002=1), GO TO H139 BRANCHPOINT

IF THIS IS A REINTERVIEW HH and HH HAS NOT CHANGED MAIN RESIDENCE SINCE HH's LAST IW (X033=5), GO TO H139 BRANCHPOINT

H135

[Is your house/Is the building your home is in] one story, two stories, or more than two stories?

1. ONE STORY………………..GO TO H139 BRANCHPOINT
2. TWO STORIES………………..GO TO H137
3. MORE THAN TWO STORIES
DK………………..GO TO H137
RF………………..GO TO H137

H136 BRANCHPOINT: IF R DID NOT REPORT THAT LIVES IN {TWO-FAMILY HOME/ DUPLEX or TOWNHOUSE/APARTMENT} (H002 {NOT 3 and NOT 4}), GO TO H137

H136

[Banner: Home Features]

Does it have an elevator?

1. YES▢
5. NO▢
DK
RF

H137

[Banner: Home Features]

Is all your living space on one floor?

1. YES……………..GO TO H139 BRANCHPOINT
5. NO
DK
RF

H138

[Banner: Home Features]

Does your home have bathroom facilities on all floors?

1. YES
5. NO
DK
RF

H139 BRANCHPOINT: IF R's AGE IS LESS THAN 65 (A019<65) and {R IS {NOT MARRIED and NOT PARTNERED} (A038=6) or R's SPOUSE's/PARTNER's AGE IS LESS THAN 65 (A044<65)}, GO TO H146 BRANCHPOINT

H139

[[Since you moved (there/here) in [MONTH (per B040),]YEAR (per B039) MOVED TO MAIN RESIDENCE/Since FINANCIAL R's LAST IW [MONTH (per X038),]YEAR (per X039)/In the last two years] have you modified your [house or apartment/house] to make it easier or safer for an older person or someone with a disability to live (there/here)?

1. YES
3. ALREADY HANDICAP ACCESSIBLE
5. NO
DK
RF

[[Since you moved there in [MONTH (per B040),]YEAR (per B039) MOVED TO MAIN RESIDENCE/Since FINANCIAL R's LAST IW [MONTH (per X038),]YEAR (per X039)/In the last two years] have you modified your [house or apartment/house] to make it easier or safer for an older person or someone with a disability to live there?

1. YES
3. ALREADY HANDICAP ACCESSIBLE
5. NO
DK
RF

H140

Sometimes buildings have special features to help older persons or someone with a disability get around.

Does your home have features such as a ramp, railings, or modifications for a wheelchair?

1. YES
5. NO………………..GO TO H143
DK………………..GO TO H143
RF………………..GO TO H143

H141M

Which special features does it have?

[INSTR: SELECT ALL THAT APPLY.]

1. RAMP
2. RAILINGS
3. MODIFICATIONS FOR A WHEELCHAIR
4. OTHER (SPECIFY) H142S_____
DK
RF

H143

How about special features to safeguard older persons or someone with a disability?

Does your home have features such as grab bars, a shower seat, or a call device or another system to get help when needed?

1. YES
5. NO………………..GO TO H203 BRANCHPOINT
DK………………..GO TO H203 BRANCHPOINT
RF………………..GO TO H203 BRANCHPOINT

H144M

What special features does it have?

[INSTR: SELECT ALL THAT APPLY.]

1. GRAB BARS OR SHOWER SEAT
2. CALL SYSTEM/OTHER SYSTEM TO GET HELP WHEN NEEDED
3. OTHER (SPECIFY) H145S_____
DK
RF

H203

H203 BRANCHPOINT: IF R HAS NOT MODIFIED CURRENT HOME FOR OLDER/DISABLED PERSON SINCE LAST IW/IN LAST 2 YEARS (H139 NOT 1), GO TO H146 BRANCHPOINT

Did you have any out-of-pocket expenses for adding features to your home to make it easier or safer for an older person or someone with a disability to live there?

This includes changes to make it easier to get around like a ramp, railings, modifications for a wheelchair and features that make it safer such as grab bars, a shower seat, or a call device to get help when needed.

1. YES
5. NO……………..GO TO H146 BRANCHPOINT
DK……………..GO TO H146 BRANCHPOINT
RF……………..GO TO H146 BRANCHPOINT

H204

About how much did you (or your [husband/wife/partner]) pay out-of-pocket for these expenses [since FINANCIAL R's LAST IW MONTH, YEAR/in the last two years]?

[INSTR: DO NOT PROBE DK/RF.]

$_____ .00 ………….. GO TO H146 BRANCHPOINT

DK
RF
About how much did you or your [husband/wife/partner] pay out-of-pocket for these expenses [since FINANCIAL R's LAST IW MONTH, YEAR/in the last two years]?

$_____ .00 ………….. GO TO H146 BRANCHPOINT

DK
RF

H205

H205-H207 Unfolding Sequence

(Thinking about how much you (or your [husband/wife/partner]) pay out-of-pocket for these expenses [since FINANCIAL R's LAST IW MONTH, YEAR/in the last two years]:)

Question text: Did it amount to less than $____ , more than $____ , or what?

PROCEDURES: 3Up1Down, 2Up2Down, 1Up3Down
BREAKPOINTS: $100, $500, $1,000, $5,000, $10,000
RANDOM ENTRY POINTS: $500, $1,000, $5,000
ENTRY POINT ASSIGNMENT: 1 or 2 or {NOT 1 and NOT 2} AT X513
ORDER OF ENTRY POINT ASSIGNMENTS AND PROCEDURES CORRESPOND

H146 BRANCHPOINT: IF THIS IS A REINTERVIEW HH and HH HAS NOT CHANGED MAIN RESIDENCE SINCE HH's LAST IW (X033=5), GO TO H150

IF R OWNS HOME (H004=1), ASSIGN CODE 2 FOR H146 AND GO TO H147

H146

#@BJ (11/15/21) Add parens ,
                                                                      #49278

[INSTR: USE CODE 3 WITHOUT ASKING IF THIS IS A FACE-TO-FACE INTERVIEW
AND IT IS OBVIOUS THAT THERE IS A KITCHEN.]

1. YES
2. INFERRED YES, R OWNS HOME
3. OBSERVED YES, DID NOT ASK
5. NO
DK
RF

Do you have your own kitchen?

1. YES
5. NO
DK
RF

H147

How many rooms are there in your home, not counting bathrooms, hallways,
or unfinished basements?

NUMBER OF ROOMS_____

DK
RF

H148_

How about the physical condition of your home, would you say it is in
excellent, very good, good, fair, or poor condition?

1. EXCELLENT
2. VERY GOOD
3 . GOOD
4 . FAIR
5 . POOR
DK
RF

H150

IF R DOES NOT LIVE IN NURSING HOME (A028 NOT 1):
Would you say the safety of your neighborhood is excellent, very good, good, fair or poor?

OTHERWISE:
Would you say the safety of <u>that</u> neighborhood is excellent, very good, good, fair or poor?

1. EXCELLENT
2. VERY GOOD
3. GOOD
4. FAIR
5. POOR
DK
RF

H151   #@ BJ (4/14/22) B&A only
                                                                        update, #49652

Not including any investment or rental properties you may own, do you (or your [husband/wife/ partner]) own a second home or condo or own timeshares in one?

1. YES
5. NO……………..GO TO ~~W353~~ U001 BRANCHPOINT
DK……………..GO TO ~~W353~~ U001 BRANCHPOINT
RF……………..GO TO ~~W353~~ U001 BRANCHPOINT

Not including any investment or rental properties you may own, do you or your [husband/wife/ partner] own a second home or condo or own timeshares in one?

1. YES
5. NO……………..GO TO ~~W353~~ U001 BRANCHPOINT
DK……………..GO TO ~~W353~~ U001 BRANCHPOINT
RF……………..GO TO ~~W353~~ U001 BRANCHPOINT

H152

[Banner: Property Ownership: Second Home, Condo, or Timeshares]

About how many weeks a year do you use it?

[INSTR: IF R REPORTS MORE THAN ONE SECOND HOME, ASK ABOUT THE ONE THEY USE MOST OFTEN.]

[INST: 0-52 WEEKS.]

WEEKS_____

DK
RF

[Banner: Property Ownership: Second Home, Condo, or Timeshares]

About how many weeks a year do you use it?

[INSTR: IF YOU OWN MORE THAN ONE 'SECOND' HOME, PLEASE ANSWER IN RELATION TO THE ONE YOU USE THE MOST.]

WEEKS_____

DK
RF

H201_H
153

[Banner: Property Ownership: Second Home, Condo, or Timeshares]

In what state is it located?

STATE_____

97. OTHER COUNTRY H154S_____
DK
RF

NOTE: THE IWER SELECTS FROM A MENU OF STATE NAMES, INCLUDING WASHINGTON, D.C., AND PUERTO RICO.

H154 BRANCKPOINT: IF H153 NOT OTHER COUNTRY (H153 NOT 97), GO TO H155

H154S

[Banner: Property Ownership: Second Home, Condo, or Timeshares]

In what country is it located?

OTHER COUNTRY

OPEN_____

H155

[Banner: Property Ownership: Second Home, Condo, or Timeshares]

In what year did you acquire it?

YEAR_____

DK
RF

H156

[Banner: Property Ownership: Second Home, Condo, or Timeshares]

Do you own all of it, part of it, or timeshares in it?

1. ALL……………..GO TO H162
2. PART
3. TIMESHARE……………..GO TO H161
DK……………..GO TO H162
RF……………..GO TO H162

H157

[Banner: Property Ownership: Second Home, Condo, or Timeshares]

What percent do you (and your [husband/wife/partner]) own?

[INSTR: DO NOT PROBE DK/RF.]

[INSTR: ENTER "0" FOR NOTHING.]

_____ % ………….. GO TO H162

DK
RF

 [Banner: Property Ownership: Second Home, Condo, or Timeshares]

What percent do you and your [husband/wife/partner] own?

[INSTR: ENTER "0" FOR NOTHING.]

_____ % ………….. GO TO H162

DK
RF

H158

H158-H160 Unfolding Sequence

(Thinking about the percent you (and your [husband/wife/partner]) own:)

Question text: Is it less than _____%, more than _____%, or what?

PROCEDURE: 2Up
BREAKPOINTS: 25%, 50%, 75%
ENTRY POINT: 25%

H158-H160 Unfolding Sequence

Thinking about the percent you and your [husband/wife/partner] own:

Question text: Is it less than _____%, more than _____%, or what?

PROCEDURE: 2Up
BREAKPOINTS: 25%, 50%, 75%
ENTRY POINT: 25%

H161 BRANCHPOINT: GO TO H162

H161

[Banner: Property Ownership: Second Home, Condo, or Timeshares]

How many weeks of timeshares do you (and your [husband/wife/partner])
have?

WEEKS_____

DK
RF

[Banner: Property Ownership: Second Home, Condo, or Timeshares]

How many weeks of timeshares do you and your [husband/wife/partner]
have?

WEEKS_____

DK
RF

H162

[Banner: Property Ownership: Second Home, Condo, or Timeshares]

What was the purchase price?

[INSTR: IF OWNS PART OR TIMESHARES, ASK PURCHASE PRICE OF R'S SHARE. IF R SAYS GIFT OR INHERITANCE, ASK VALUE WHEN RECEIVED.]

[INSTR: DO NOT PROBE DK/RF.]

[INSTR: ENTER "0" FOR NOTHING.]

$_____ .00 ………….. GO TO H166

DK
RF

[Banner: Property Ownership: Second Home, Condo, or Timeshares]

What was the purchase price?

[INSTR: IF YOU OWN PART OF A TIMESHARE, PLEASE REPORT THE PURCHASE PRICE OF YOUR SHARE. IF IT IS A GIFT OR INHERITANCE, REPORT ITS VALUE WHEN IT WAS RECEIVED.]

[INSTR: ENTER "0" FOR NOTHING.]

$_____ .00 ………….. GO TO H166

DK
RF

H163

H163-H165 Unfolding Sequence

(Thinking about the purchase price:)

Question text: Was it less than $____ , more than $____ , or what?

PROCEDURES: 2Up1Down, 1Up2Down
BREAKPOINTS: $15,000, $35,000, $60,000, $100,000
RANDOM ENTRY POINTS: $35,000, $60,000
ENTRY POINT ASSIGNMENT [1 ($35,000)] or [NOT 1 ($60,000)] AT X504

H163-H165 Unfolding Sequence

Thinking about the purchase price:

Question text: Was it less than $_____ , more than $_____ , or what?

PROCEDURES: 2Up1Down, 1Up2Down
BREAKPOINTS: $15,000, $35,000, $60,000, $100,000
RANDOM ENTRY POINTS: $35,000, $60,000
ENTRY POINT ASSIGNMENT [1 ($35,000)] or [NOT 1 ($60,000)] AT X504

H166

[Banner: Property Ownership: Second Home, Condo, or Timeshares]

What is [its present value/the present value of your part of it]?We mean, about what would it bring if it were sold today?

[INSTR: DO NOT PROBE DK/RF.]

[INSTR: ENTER "0" FOR NOTHING.]

$_____ .00 ………….. GO TO U001 BRANCHPOINT ~~H170~~

DK
R

[Banner: Property Ownership: Second Home, Condo, or Timeshares]

What is [its present value/the present value of your part of it]? That is, about what would it bring if it were sold today?

[INSTR: ENTER "0" FOR NOTHING.]

 $_____ .00 ………….. GO TO U001 BRANCHPOINT ~~H170~~

DK
RF

H167

H167-H169 Unfolding Sequence

(Thinking about [its present value/the present value of your part of it]:)

Question text: Does it amount to less than $____ , more than $____ , or what?

PROCEDURES: 2Up1Down, 1Up2Down
BREAKPOINTS: $15,000, $50,000, $150,000, $500,000
RANDOM ENTRY POINTS: $50,000, $150,000
ENTRY POINT ASSIGNMENT [1 ($50,000)] or [NOT 1 ($150,000)] AT X505

H167-H169 Unfolding Sequence

Thinking about [its present value/the present value of your part of it]:

Question text: Does it amount to less than $____ , more than $____ , or what?

PROCEDURES: 2Up1Down, 1Up2Down
BREAKPOINTS: $15,000, $50,000, $150,000, $500,000
RANDOM ENTRY POINTS: $50,000, $150,000
ENTRY POINT ASSIGNMENT [1 ($50,000)] or [NOT 1 ($150,000)] AT X505

U001 BRANCHPOINT:

ASK IF FOLLOWING CONDITIONS ARE MET:

R HAS NOT MOVED SECOND HOME (A073 = 1) AND

LIVING R (A007 = 1)

AND PREVIOUS WAVE FINANCIAL INTERVIEW TOOK PLACE IN PREVIOUS WAVE (X039 >= 2020)

AND THIS IS A REINTERVIW HH (X024 = 1)

AND SAME FINANCIAL REPORTER AS LAST WAVE (X007 = 1 OR 3 AND X077 = 1 OR 3)

AND (SELF LAST WAVE AND SELF THIS WAVE (A009 = 1 AND Z095_2 = 1) OR PROXY LAST WAVE AND SAME PROXY THIS WAVE (A009 = 2 OR A009 = 3 OR A009 = 4) AND (A010 =1))

AND ASSET LEVEL THRESHOLD IS MET:

DIFFERENCE BETWEEN WAVES IS GREATER THAN OR EQUAL TO $50,000

   (MIN CW - MAX PW) OR (MIN PW - MAX CW) >= $50,000

   (H166 (or H167 if UNF) – Z164) or (Z163 - H166 (or H168 if UNF)) >= $50,000)

AND

DIFFERENCE BETWEEN WAVES IS GREATER THAN THE MIN OF PREVIOUS WAVE OR MIN OF CURRENT WAVE

   (MIN CW - MAX PW) OR (MIN PW - MAX CW) > (MIN PW OR MIN CW)

   (H166 (or H167 if UNF) – Z164)) > Z163 OR (H166 (or H167 if UNF)

         OR

   (Z163 - H166 (or H168 if UNF))) > Z163 OR (H166 (or H167 if UNF)

ELSE, GO TO H170

Note: See Appendix for further explanation of calculations and data analysis notes

U001

IF THE RESPONDENT HAS HAD THE SAME ASSET IN BOTH, THE PREVIOUS AND THE CURRENT INTERVIEW YEAR:
According to our records, in [PREVIOUS WAVE YEAR] you owned a second home worth [about/less than/more than] [AMOUNT] Now you own a primary residence worth [about/less than/more than] [AMOUNT].

IF THE RESPONDENT HAS HAD THE ASSET ONLY IN THE CURRENT INTERVIEW YEAR:
According to our records, you currently owned a second home residence worth [about/less than/more than] [AMOUNT]. In [PREVIOUS WAVE YEAR] you did not own your primary residence.

IF THE RESPONDENT HAS HAD THE ASSET ONLY IN THE PREVIOUS INTERVIEW YEAR:
According to our records, in [PREVIOUS WAVE YEAR] you owned a second home worth [about/less than/more than] [AMOUNT] Now you do not own your primary residence.

ALL RESPONDENTS:
Does this sound right?

[INSTR: ENTER RF TO EXIT ASSET VERIFICATION.]

IF THE RESPONDENT HAS HAD THE SAME ASSET IN BOTH, THE PREVIOUS AND THE CURRENT INTERVIEW YEAR:
According to our records, in [PREVIOUS WAVE YEAR] you owned a second home worth [about/less than/more than] [AMOUNT] Now it is worth [about/less than/more than] [AMOUNT].

IF THE RESPONDENT HAS HAD THE ASSET ONLY IN THE CURRENT INTERVIEW YEAR:
According to our records, you currently own a second home worth [about/less than/more than] [AMOUNT]. In [PREVIOUS WAVE YEAR] you did not own your second residence.

IF THE RESPONDENT HAS HAD THE ASSET ONLY IN THE PREVIOUS INTERVIEW YEAR:
According to our records, in [PREVIOUS WAVE YEAR] you owned a second home worth [about/less than/more than] [AMOUNT] Now you do not own your second residence.

ALL RESPONDENTS:
Does this sound right?

1. YES ………………. GO TO H170
5. NO
DK ……………….. GO TO H170
RF ……………….. GO TO H170

U002

Which record is wrong, the [PREVIOUS WAVE YEAR] or the [CURRENT WAVE YEAR] report?

1. PREVIOUS WAVE
3. CURRENT WAVE
5. BOTH
DK ………………. GO TO H170
RF ……………….   GO TO H170

U003

About how much [was this /is this] worth in [PREVIOUS WAVE YEAR/CURRENT WAVE YEAR]?

IF PREVIOUS WAVE THEN USE THIS INSTRUCTION:
[INSTR: ENTER "0" IF THIS ASSET DID NOT EXIST IN [PREVIOUS WAVE YEAR]

IF CURRENT WAVE THEN USE THIS INSTRUCTION:
[INSTR: ENTER "0" IF THIS ASSET DID NOT EXIST IN [CURRENT WAVE YEAR]]

[IWER: DO NOT PROBE DK/RF]

 $_____, GO TO H170

DK
RF

NOTE: IF R SAID BOTH RECORDS WERE INCORRECT (U002=5) AND THE RECORD THAT WAS JUST QUESTIONED AT U003 WAS FOR THE PREVIOUS WAVE, RETURN TO U003 AND ASK ABOUT THE RECORD FOR THE CURRENT WAVE. OTHERWISE, CONTINUE ON TO THE INSTRUCTION FOR THE END OF U001 LOOP.

#@ BJ (5/4/21) B&A cleanup. Flow has always been this way. Discovered when testing alt wave. #48521

About how much [was this/is this] worth in [PREVIOUS WAVE YEAR/CURRENT WAVE YEAR]?

IF PREVIOUS WAVE THEN USE THIS INSTRUCTION:
[INSTR: ENTER "0" IF THIS ASSET WAS NOT OWNED IN [PREVIOUS WAVE YEAR]

IF CURRENT WAVE THEN USE THIS INSTRUCTION:
[INSTR: ENTER "0" IF THIS ASSET IS NOT OWNED IN [CURRENT WAVE YEAR]]

$_____, GO TO H170

DK
RF

NOTE: IF R SAID BOTH RECORDS WERE INCORRECT (U002=5) AND THE RECORD THAT WAS JUST QUESTIONED AT U003 WAS FOR THE PREVIOUS WAVE, RETURN TO U003 AND ASK ABOUT THE RECORD FOR THE CURRENT WAVE. OTHERWISE, CONTINUE ON TO THE INSTRUCTION FOR THE END OF U001 LOOP.

Note: For data anlysis purposes, U003 is not always stored at the corresponding 'underscore' value, since there is an option to record U003 at prev wave year and current wave year. So, when U001_1, U003_1 = last wave amount and U003_2 = current wave amount. (Ex. When an R answered '3' at U002_3, reconciled value was stored at U003_6 and not at U003_3).

U004-
U006

Thinking about how much this [is/was] worth in [PREVIOUS WAVE YEAR/CURRENT WAVE YEAR]...

Question wording: Does it amount to less than $_____ , more than $_____ , or what?

$_____ .00

DK
RF

H170 BRANCHPOINT: IF H151 = 5, 8, 9 OR MISSING, GO TO W353	#@ BJ (5/26/22) Adding BP to correct B&A flow error, #49750

H170M

Do you have a mortgage, land contract, second mortgage, or any other loan that uses this property as collateral?

Please do not include home equity lines of credit.

[INSTR: IF R SAYS THEY REFINANCED THE MORTGAGE, TREAT IT AS A MORTGAGE.]

[INSTR: SELECT ALL THAT APPLY.]

1. YES, MORTGAGE/ LAND CONTRACT
2. YES, 2ND MORTGAGE
3. YES, OTHER LOAN
4. [VOL] R HAS REVERSE MORTGAGE……………..GO TO H182 BRANCHPOINT
5. NO……………..GO TO H182 BRANCHPOINT
DK……………..GO TO H182 BRANCHPOINT
RF……………..GO TO H182 BRANCHPOINT

Do you have a mortgage, land contract, second mortgage, or any other loan that uses this property as collateral?

Please do not include home equity lines of credit.

[INSTR: IF YOU REFINANCED THE MORTGAGE, PLEASE TREAT IT AS A MORTGAGE]

[INSTR: SELECT ALL THAT APPLY.]

1. YES, MORTGAGE OR LAND CONTRACT
2. YES, 2ND MORTGAGE
3. YES, OTHER LOAN
4. YES REVERSE MORTGAGE……………..GO TO H182 BRANCHPOINT
5. NO……………..GO TO H182 BRANCHPOINT
DK……………..GO TO H182 BRANCHPOINT
RF……………..GO TO H182 BRANCHPOINT

H171

(Taking all mortgages and loans together,) about how much do you owe on your second home?

[INSTR: DO NOT PROBE DK/RF.]

[INSTR: ENTER "0" FOR NOTHING.]

 $_____ .00 ………….. GO TO H175

DK
RF
Taking all mortgages and loans together, about how much do you owe on your second home?

[INSTR: ENTER "0" FOR NOTHING.]

$_____ .00 ………….. GO TO H175

DK
RF

H172

H172-H174 Unfolding Sequence

(Thinking about what you owe on your second home, taking all mortgages and loans together:)

Question text: Does it amount to less than $____ , more than $____ , or what?

PROCEDURES: 3Up, 2Up1Down
BREAKPOINTS: $15,000, $40,000, $75,000, $150,000
RANDOM ENTRY POINTS: $15,000, $40,000
ENTRY POINT ASSIGNMENT [1 ($15,000)] or [NOT 1 ($40,000)] AT X506

H172-H174 Unfolding Sequence

Thinking about what you owe on your second home, taking all mortgages and loans together:

Question text: Does it amount to less than $____ , more than $____ , or what?

PROCEDURES: 3Up, 2Up1Down
BREAKPOINTS: $15,000, $40,000, $75,000, $150,000
RANDOM ENTRY POINTS: $15,000, $40,000
ENTRY POINT ASSIGNMENT [1 ($15,000)] or [NOT 1 ($40,000)] AT X506

H175

(Taking all mortgages and loans together,) about how much are the payments on [that mortgage/that loan/those loans]?

[INSTR: DO NOT PROBE DK/RF.]

[INSTR: ENTER "0" FOR NOTHING, AND PRESS "NEXT" TO CONTINUE.]

$_____ .00 ………….. GO TO H179

0……………...GO TO H182 BRANCHPOINT
DK
RF

Taking all mortgages and loans together, about how much are the payments on [that mortgage/that loan/those loans]?

[INSTR: ENTER "0" FOR NOTHING, AND PRESS "NEXT" TO CONTINUE.]

$ _____ .00 ………….. GO TO H179

0……………...GO TO H182 BRANCHPOINT
DK
RF

H176

H176-H178 Unfolding Sequence

(Thinking about the payments on [that mortgage/that loan/those loans], taking all mortgages and loans together:)

Question text: Do they amount to less than $____ per month, more than $____ per month, or what?

PROCEDURES: 2Up1Down, 1Up2Down
BREAKPOINTS: $200, $350, $500, $1,000
RANDOM ENTRY POINTS: $350, $500
ENTRY POINT ASSIGNMENT [1 ($350)] or [NOT 1 ($500)] AT X507
H176-H178 Unfolding Sequence

Thinking about the payments on [that mortgage/that loan/those loans], taking all mortgages and loans together:

Question text: Do they amount to less than $____ per month, more than $____ per month, or what?

PROCEDURES: 2Up1Down, 1Up2Down
BREAKPOINTS: $200, $350, $500, $1,000
RANDOM ENTRY POINTS: $350, $500
ENTRY POINT ASSIGNMENT [1 ($350)] or [NOT 1 ($500)] AT X507

H179

PER:

1. WEEK
2. 2 X MONTH
3. MONTH
4. QUARTER
5. 6 MONTH
6. YEAR
7. OTHER (SPECIFY) H180S_____
DK
RF

H181

[Banner: Payments on a Second Home]

Do the payments include property taxes or insurance?

(Which?)

1. TAXES ONLY
2. INSURANCE ONLY
3. BOTH
5. NO, NEITHER
DK
RF
[Banner: Payments on a Second Home]

Do the payments include property taxes or insurance?

Which?

1. TAXES ONLY
2. INSURANCE ONLY
3. BOTH
5. NO, NEITHER
DK
RF

H182 BRANCHPOINT: IF HH STILL LIVES IN SAME RESIDENCE AS PREVIOUS
WAVE's SECOND HOME (A073=1) and PREVIOUS SECOND HOME HAS NOT
BECOME HH's MAIN RESIDENCE (A085 NOT 3) and ALTERNATE WAVE FLAG IS
NOT SET TO ASK QUESTIONS (H202>0), GO TO H186

NOTE: QUESTIONS H182 THROUGH H185 ARE ALWAYS ASKED OF NEW INTERVIEW HHs. THEY ARE ASKED OF REINTERVIEW HHs WHEN THE HH HAS NEWLY ACQUIRED A SECOND HOME THIS WAVE OR WHEN THE HH's SECOND HOME IS DIFFERENT FROM THAT OF THE PREVIOUS WAVE (INCLUDING WHEN SECOND HOME HAS NOW BECOME THE MAIN RESIDENCE). OTHERWISE, FOR HHs WHOSE SECOND HOME IS THE SAME AS LAST WAVE, THEY ARE ASKED ONLY IN ALTERNATE WAVES. THEY WERE ASKED OF REINTERVIEW HHs IN THE 2016 2020 WAVE AND WILL BE ASKED AGAIN IN 2024 2020, BUT WILL NOT BE ASKED IN 2018. 2022

H182

[Banner: Names on Deed to Second Home]

Does the deed to this property have anyone's name on it besides yours (or your [husband/wife/partner]'s)?

1. YES
5. NO………………GO TO H186
DK………………GO TO H186
RF………………GO TO H186

[Banner: Names on Deed to Second Home]

Does the deed to this property have anyone's name on it besides yours or your [husband/wife/partner]'s?

1. YES
5. NO………………GO TO H186
DK………………GO TO H186
RF………………GO TO H186

H183

[Banner: Names on Deed to Second Home]

What is that person's relationship to you (or your [husband/wife/partner])?

[INSTR: IF 'TRUST' IS MENTIONED, ENTER RELATIONSHIP OF TRUST BENEFICIARIES.]

[INSTR: SELECT ALL THAT APPLY.]

1. CHILD
2. CHILD-IN-LAW
3. GRANDCHILD
4. PARENT
5. OTHER RELATIVE (SPECIFY)
6. OTHER PERSON (INCLUDING EX-SPOUSE)
7. ORGANIZATION OR INSTITUTION
DK
RF

[Banner: Name on Deed to Second Home]

What is that person's relationship to you (or your [husband/wife/partner])?

[INSTR: IF YOUR HOME IS INCLUDED IN A TRUST, PLEASE INDICATE THE RELATIONSHIP OF THE BENEFICIARIES OF THAT TRUST.]

[INSTR: SELECT ALL THAT APPLY.]

1. CHILD
2. CHILD-IN-LAW
3. GRANDCHILD
4. PARENT
5. OTHER RELATIVE (SPECIFY)
6. OTHER PERSON (INCLUDING EX-SPOUSE)
7. ORGANIZATION OR INSTITUTION
DK
RF

H184 BRANCHPOINT: IF H183 INCLUDES OTHER RELATIVE (H183 = 5), CONTINUE
ELSE, GO TO H197 BRANCHPOINT

H184S

OTHER RELATIVE (SPECIFY)

OPEN_____

What is that other relative's relationship to you or your [husband/wife/partner]?

OPEN_____

H197S

OTHER PERSON (SPECIFY)

OPEN_____

What is that other person's relationship to you or your [husband/wife/partner]?

OPEN_____

H200_H
185

[Banner: Name on Deed to Second Home]

IF CHILD (H183=1):
Which child or children is that?

ELSE, IF CHILD-IN-LAW (H183=2 OR 2 AND 3):
Which of your children is married to [him/her]?

ELSE, IF GRANDCHILD (H183=3):
Which of your children is the parent of that grandchild or grandchildren?

[INSTR: SELECT ALL THAT APPLY.]

CHILD NAME(S)[DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]
03. THROUGH 52. CHILD NAME(S)
[ROWS PROVIDED BY BLAISE AS NECESSARY]
92. UNLISTED CHILD WHO IS DECEASED
93. ALL CHILDREN
98. DK
99. RF

NOTE: NAMES OF CHILDREN ARE DISPLAYED. THE IWER MAY SELECT AS MANY NAMES AS APPLY, AS WELL AS "UNLISTED CHILD WHO IS DECEASED"

H186

What were the real estate taxes in LAST CALENDAR YEAR on that second home?

[INSTR: DO NOT PROBE DK/RF.]

[INSTR: ENTER "0" FOR NOTHING.]

[INSTR: IF R CANNOT SAY BECAUSE INCLUDED IN MORTGAGE OR FEES, ENTER DK.]

$_____ .00 ………….. GO TO W353 BRANCHPOINT

DK
RF

What were the real estate taxes in LAST CALENDAR YEAR on that second home?

[INSTR: ENTER "0" FOR NOTHING.]

$_____ .00 ………….. GO TO W353 BRANCHPOINT

DK
RF

H187

H187-H189 Unfolding Sequence

(Thinking about the real estate taxes in LAST CALENDAR YEAR on that second home:)

Question text: Did they amount to less than $_____ , more than $_____ , or what?

PROCEDURES: 2Up, 1Up1Down, 2Down
BREAKPOINTS: $500, $3,000, $10,000
RANDOM ENTRY POINTS: $500, $3,000, $10,000
ENTRY POINT ASSIGNMENT [1 ($500)] or [2 ($3,000)] or
[{NOT 1 and NOT 2} ($10,000)] AT X515
H187-H189 Unfolding Sequence

Thinking about the real estate taxes in LAST CALENDAR YEAR on that second home:

Question text: Did they amount to less than $_____ , more than $_____ , or what?

PROCEDURES: 2Up, 1Up1Down, 2Down
BREAKPOINTS: $500, $3,000, $10,000
RANDOM ENTRY POINTS: $500, $3,000, $10,000
ENTRY POINT ASSIGNMENT [1 ($500)] or [2 ($3,000)] or
[{NOT 1 and NOT 2} ($10,000)] AT X515

W353 BRANCHPOINT: IF {{HH HAS MORTGAGE ({H024 or H170}={1 or 2}), CONTINUE ON TO W353

IF {NO LONGER LIVES IN A HOME THAT OWNED IN LAST IW
{{1ST HOME: (X079=1 and A071={5 or 8 or 9})} or {2ND HOME: (X032=1 and A073={5 or 8 or 9})}} or R IN NURSING HOME NO LONGER OWNS HOME ({X079=1 or X032}=1 and A070={5 or 8 or 9})}, CONTINUE ON TO W353

IF R LIVES IN A HOME THAT OWNED IN LAST IW BUT DOES NOT OWN NOW {{1ST HOME: (X079=1 and A071=1 and {H004 NOT 1} and {H008 {NOT 1 and NOT 2}} and {H014 {NOT 1 and NOT 3}})} or {2ND HOME: (X032=1 and A073=1 and {H151 NOT 1})}}, CONTINUE ON TO W353

OTHERWISE, GO TO H115 BRANCHPOINT

W353

We are interested in how recent problems in the housing market have affected you and your family.

IF THIS IS {A NEW COHORT INTERVIEW (X024 NOT 1)
Have you fallen more than 2 months behind on mortgage payments in the past 10 years?

OTHERWISE:
Have you fallen more than 2 months behind on mortgage payments in the past 2 years?

1. YES
5. NO……………..GO TO H115 BRANCHPOINT
DK……………..GO TO H115 BRANCHPOINT
RF……………..GO TO H115 BRANCHPOINT

W354

IF THIS IS {A NEW COHORT INTERVIEW (X024 NOT 1)
Have you gone through a foreclosure in the past 10 years?

OTHERWISE:
Have you gone through a foreclosure in the past 2 years?

DEFINITION: By "foreclosure" we mean when a bank takes possession of the house because the owner did not keep up with the mortgage payments.

1. YES
5. NO……………..GO TO W356
DK……………..GO TO W356
RF……………..GO TO W356

W355

[Home Foreclosure]

Did you lose your home because of this?

1. YES……………..GO TO H115 BRANCHPOINT
5. NO……………..GO TO H115 BRANCHPOINT
DK……………..GO TO H115 BRANCHPOINT
RF……………..GO TO H115 BRANCHPOINT

W356

Are you facing possible foreclosure?

DEFINITION: By "foreclosure" we mean when a bank takes possession of the house because the owner did not keep up with the mortgage payments.

1. YES
5. NO
DK
RF

NOTE: ENTRANCE IN TO H115 IS BASED ON BACKGROUND ASSIGNMENT OF H208. IF H208 = 1 OR 2, GO IN.

H115

IF R LIVES IN OTHER HEALTH CARE FACILITY (A237 = NOT 1):

Our records indicate that you currently live in [[a/an] facility, memory care center/ assisted living facility/rehabilitation center/ retirement community/senior living facility/rest home/hospital/hospice] which may provide special services. The next few questions will ask about those services.

If R LIVES IN A NURSING HOME (A237 =1):

Our records indicate that you currently live in a nursing home. However, the next few questions will continue to be about your Main residence in [city/state].

ASK OF ALL Rs:
Even if you don't use them now, does the place you live offer any of the following:

Group meals?

1. YES
5. NO……………..GO TO H118
3. [VOL] R DISPUTES RECORD……………..GO TO H ASSIST
4. NO SERVICES OFFERED……………..GO TO H ASSIST

DK……………..GO TO H118
RF……………..GO TO H118

IF R LIVES IN OTHER HEALTH CARE FACILITY (A237 = NOT 1):

Our records indicate that you currently live in [[a/an] facility, assisted living facility/rehabilitation center/memory care center/senior living facility/rest home/hospital/hospice] which may provide special services. The next few questions will ask about those services.

If R LIVES IN A NURSING HOME (A237 =1):

Our records indicate that you currently live in a nursing home. However, the next few questions will continue to be about your Main residence in [city/state].

ASK OF ALL Rs:
Even if you don't use them now, does the place you live offer any of the following:

Group meals?

1. YES
5. NO……………..GO TO H118
3. I DO NOT LIVE IN A RETIREMENT COMMUNITY……………..GO TO H ASSIST

DK……………..GO TO H118
RF……………..GO TO H118

H116

[Banner: Retirement Community Special Services: Group Meals]

Do you pay extra if you use this service?

1. YES
5. NO
DK
RF

H117

[Banner: Retirement Community Special Services: Group Meals]

Do you (or your [husband/wife/partner]) use it now?

1. YES
5. NO
DK
RF

H118

(Does the place you live offer) transportation services?

1. YES
5. NO………………GO TO H121
DK………………GO TO H121
RF………………GO TO H121

Does the place you live offer transportation services?

1. YES
5. NO………………GO TO H121
DK………………GO TO H121
RF………………GO TO H121

H119

[Banner: Retirement Community Special Services:Transportation]

Do you pay extra if you use this service?

1. YES
5. NO
DK
RF

H120

[Banner: Retirement Community Special Services:Transportation]

Do you (or your [husband/wife/partner]) use it now?

1. YES
5. NO
DK
RF

H121

(Does the place you live offer) help with housekeeping chores?

1. YES
5. NO……………..GO TO H124
DK……………...GO TO H124
RF……………...GO TO H124

Does the place you live offer help with housekeeping chores?

1. YES
5. NO……………..GO TO H124
DK……………..GO TO H124
RF……………..GO TO H124

H122

[Banner: Retirement Community Special Services: Housekeeping]

Do you pay extra if you use this service?

1. YES
5. NO
DK
RF

H123

[Banner: Retirement Community Special Services: Housekeeping]

Do you (or your [husband/wife/partner]) use it now?

1. YES
5. NO
DK
RF

H124

(Does the place you live offer) help with bathing, dressing or eating?

1. YES
5. NO………………GO TO H127
DK………………GO TO H127
RF………………GO TO H127

Does the place you live offer help with bathing, dressing or eating?

1. YES
5. NO………………GO TO H127
DK………………GO TO H127
RF………………GO TO H127

H125

[Banner: Retirement Community Special Services: Help with Bathing, Dressing or Eating]

Do you pay extra if you use this service?

1. YES
5. NO
DK
RF

H126

[Banner: Retirement Community Special Services: Help with Bathing, Dressing or Eating]

Do you (or your [husband/wife/partner]) use it now?

1. YES
5. NO
DK
RF

H127

(Does the place you live offer) an emergency call button or check on residents?

1. YES
5. NO……………..GO TO H130
DK……………..GO TO H130
RF……………..GO TO H130

H128

[Banner: Retirement Community Special Services: Emergency Call Button]

Do you pay extra if you have this service?

1. YES
5. NO
DK
RF

H129

[Banner: Retirement Community Special Services: Emergency Call Button]

Do you (or your [husband/wife/partner]) have it now?

1. YES
5. NO
DK
RF

H130

(Does the place you live offer) Nursing care or an on-site nurse?

1. YES
5. NO……………..GO TO H134
DK……………...GO TO H134
RF……………...GO TO H134

H131

Is there a special resident facility for people who need nursing care?

1. YES
5. NO
DK
RF

H132

Do you pay extra if you use the nursing care service?

1. YES
5. NO
DK
RF

H133

Do you (or your [husband/wife/partner]) use the nursing care service now?

1. YES
5. NO
DK
RF

Do you or your [husband/wife/partner] use the nursing care service now?

1. YES
5. NO
DK
RF

H134

Would the place where you live now allow you to continue living in your current unit even if you needed substantial care?

1. YES
5. NO
DK
RF

H192

H ASSIST
[INSTR:
HOW OFTEN DID R RECEIVE ASSISTANCE WITH ANSWERS IN SECTION H - HOUSING?]

1. NEVER
2. A FEW TIMES
3. MOST OR ALL OF THE TIME
4. THE SECTION WAS DONE BY A PROXY REPORTER

GO TO SECTION J