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

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)

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)

HH LIVED ON FARM IN HH’s LAST IW (X089=1)

R LIVED IN RETIREMENT/SENIOR CITIZEN/OTHER HOUSING WITH SERVICES IN HH’s LAST IW (Z144=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 (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)

* 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.
H001 BRANCHPOINT: IF THIS IS NOT A FINANCIAL R (X007 {NOT 1 and NOT 3}), GO TO SECTION J

IF R IS CURRENTLY IN {NURSING HOME OR HEALTH CARE FACILITY} (A028=1) and R DID NOT REPORT THAT {OWNS OR RENTS} A HOME OUTSIDE THE NURSING HOME (A070 NOT 1), GO TO SECTION J

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

H001

Now I have a few questions about your (house or apartment/house/apartment) 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?

OTHERWISE:
Do you live on a farm or ranch?

1. YES  5. NO  8. DK  9. RF

H002

READ TO Rs WHO WERE NOT ASKED H001:
Now I have a few questions about your (house or apartment/house/apartment) in MAIN RESIDENCE CITY, STATE (STATE ABBREVIATION).

IF R IS LIVING IN A NURSING HOME (A028=1):
(Is that (house or apartment/house/apartment) 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?)

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

1. MOBILE HOME  2. ONE-FAMILY HOUSE  3. TWO-FAMILY HOUSE/DUPLEX

GO TO H008

BRANCHPOINT

4. APARTMENT/TOWNHOUSE  7. OTHER (SPECIFY)  8. DK  9. RF

H003

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  
3. LIVES RENT-FREE WITH RELATIVE/EMPLOYER/FRIEND  
GO TO H079  
GO TO H085 BRANCHPOINT

7. OTHER (SPECIFY)  
8. DK  
9. RF

H005

GO TO H085 BRANCHPOINT

H006 BRANCHPOINT: IF R LIVES IN A ONE-FAMILY HOUSE (H002=2) or 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  
8. DK  
9. RF

H007  
The following questions refer to [the entire property/your unit only].  
[IWER: ENTER 1 TO CONTINUE]

1. 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. OWNS ALL  2. OWNS PART  3. RENTS  7. OTHER (SPECIFY)  8. DK  9. RF

GO TO H013

H009

GO TO H079

GO TO H085 BRANCHPOINT

H010
Now I'd like to ask about the part of the property that you (and your [husband/wife/partner]) personally own.

About what percent of the total property is that?

__________  DK  RF

PERCENT

H011
Do you (and your [husband/wife/partner]) own the (house/mobile home) and the immediately surrounding land?

1. YES  5. NO  8. DK  9. RF

GO TO H013

H012
Do you pay any rent on this (house/mobile home), or what?

1. YES, PAY RENT  5. NO, OTHER  8. DK  9. RF

H013
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.

1. CONTINUE
What is its present value? I mean, what would it bring if it were sold today?

[IWER: DO NOT PROBE DK/RF]
[IWER: USE 0 FOR NOTHING]

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GO TO H014 BRANCHPOINT (AFTER H023)

H021-H023 Unfolding Sequence
Question text: 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

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

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. OWNS BOTH HOME & SITE   2. OWNS ONLY SITE   3. OWNS ONLY HOME
4. RENTS BOTH   7. NEITHER OWNS NOR RENTS   8. DK   9. RF

GO TO H079   GO TO H085 BRANCHPOINT

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

1. CONTINUE
H016
What is its present value? I mean, what would it bring if it were sold today?

[IWER: DO NOT PROBE DK/RF]
[IWER: USE 0 FOR NOTHING]

__________________________
AMOUNT
_______________________

DK RF

GO TO H024

H017-H019 Unfolding Sequence
Question text: 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?

Please do not include home equity lines of credit.

[IWER: IF R SAYS THEY REFINANCED THE MORTGAGE, TREAT IT AS A MORTGAGE]
[IWER: CHOOSE ALL THAT APPLY]

1. YES, MORTGAGE/ LAND CONTRACT
2. YES, 2ND MORTGAGE
3. YES, OTHER LOANS

GO TO H036 BRANCHPOINT UNLESS 1 WAS ALSO SELECTED

5. NO
8. DK
9. RF

GO TO H036 BRANCHPOINT
H025
About how much are the payments on the (first) mortgage or land contract?

[IWER: DO NOT PROBE DK/RF]
[IWER: USE 0 FOR NOTHING]

AMOUNT

0   DK   RF

GO TO H029   GO TO H032

H026-H028 Unfolding Sequence
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
PER:

1. WEEK    2. 2 X MONTH    3. MONTH    4. QUARTER
5. 6 MONTH    6. YEAR    7. OTHER (SPECIFY)    8. DK    9. RF

H031
Do the payments include property taxes or insurance?
(Which?)

1. TAXES ONLY    2. INSURANCE ONLY    3. BOTH    5. NO, NEITHER    8. DK    9. RF
H032

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

[IWER: DO NOT PROBE DK/RF]

[IWER: USE 0 FOR NOTHING]

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GO TO H036 BRANCHPOINT

H033-H035 Unfolding Sequence

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

H036 BRANCHPOINT: IF R DID NOT REPORT THAT HAS SECOND MORTGAGE (H024 NOT 2),
GO TO H046 BRANCHPOINT
H036

About how much are the payments on that second mortgage?

[IWER: DO NOT PROBE DK/RF]
[IWER: USE 0 FOR NOTHING]

---

AMOUNT

0

DK

RF

GO TO H040

GO TO H042

H037-H039 Unfolding Sequence

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

PER:

1. WEEK

2. 2 X MONTH

3. MONTH

4. QUARTER

5. 6 MONTH

6. YEAR

7. OTHER (SPECIFY)

8. DK

9. RF

H041
H042

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

[IWER: DO NOT PROBE DK/RF]

[IWER: USE 0 FOR NOTHING]

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GO TO H046
BRANCHPOINT

H043-H045 Unfolding Sequence

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?

[IWER: DO NOT PROBE DK/RF]
[IWER: USE 0 FOR NOTHING]

0  DK  RF

AMOUNT

GO TO H050  GO TO H052

H047-H049 Unfolding Sequence
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
PER:

1. WEEK  2. 2 X MONTH  3. MONTH  4. QUARTER

5. 6 MONTH  6. YEAR  7. OTHER (SPECIFY)  8. DK  9. RF

H051
H052

About how much do you still owe on that loan?

[IWER: DO NOT PROBE DK/RF]
[IWER: USE 0 FOR NOTHING]

| AMOUNT | DK | RF |

GO TO H056

H053-H055 Unfolding Sequence

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: A HOME EQUITY LINE OF CREDIT IS A LINE OF CREDIT OBTAINED BY USING THE EQUITY IN ONE’S HOME AS SECURITY.

| 1. YES | 5. NO | 8. DK | 9. RF |

GO TO H066 BRANCHPOINT
H057
What is the maximum amount you could borrow on this line of credit?

[IWER: DO NOT PROBE DK/RF]
[IWER: USE 0 FOR NOTHING]

_________

AMOUNT

DK     RF

GO TO H061

H058-H060 Unfolding Sequence
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
Do you currently have a loan against this line of credit?

1. YES  5. NO  8. DK  9. RF

GO TO H066 BRANCHPOINT
H062
About how much is currently owed?

[IWER: DO NOT PROBE DK/RF]
[IWER: USE 0 FOR NOTHING]

AMOUNT

DK  RF

GO TO H066
BRANCHPOINT

H063-H065 Unfolding Sequence
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 BRANCHPOINT: IF THIS IS A REINTERVIEW HH (X024 NOT 1) and HH HAS NOT
CHANGED MAIN RESIDENCE SINCE HH’s LAST IW (X033=5), GO TO
H071 BRANCHPOINT
H066
What was the purchase price (of your home)?
[IWER: DO NOT PROBE DK/RF]
[IWER: IF R SAYS GIFT OR INHERITANCE, ASK VALUE WHEN RECEIVED]
[IWER: USE 0 FOR NOTHING]

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GO TO H070

H067-H069 Unfolding Sequence
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
In what year did you acquire it?

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<tr>
<th>YEAR</th>
<th>DK</th>
<th>RF</th>
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H071 BRANCHPOINT: IF HH DID NOT MOVE RESIDENCE SINCE HH’s LAST IW (X033=5),
GO TO H075

H071
Does the deed to your home have anyone’s name on it besides yours (or your [husband/wife/partner]’s)?

1. YES  5. NO  8. DK  9. RF

GO TO H075
What is that person’s relationship to you?

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

1. CHILD
2. CHILD-IN-LAW
3. GRANDCHILD
4. PARENT

GO TO H075

5. OTHER RELATIVE (SPECIFY)

GO TO H075

H074/H198_H074

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

IF CHILD-IN-LAW (H072=2):
Which of your children is married to [him/her]?

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

CHILD NAME(S) [DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]

[ROWS PROVIDED BY BLAISE AS NECESSARY]

92. DECEASED CHILD
93. ALL CHILDREN
98. DK
99. RF

NOTE: NAMES OF CHILDREN (per X058) ARE DISPLAYED. THE IWER MAY SELECT AS MANY NAMES AS APPLY, AS WELL AS “DECEASED CHILD”.

GO TO H075
What were the real estate taxes in LAST CALENDAR YEAR (per InitA061TLCY) on this home?

[IWER: IF R CANNOT SAY BECAUSE INCLUDED IN MORTGAGE OR FEE, ENTER COMMENT USING [F2] AND [ALT-D]]

[IWER: DO NOT PROBE DK/RF]

[IWER: USE 0 FOR NOTHING]

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GO TO H079 BRANCHPOINT

H076-H078 Unfolding Sequence

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

PROCEDURE: 1Up1Down
BREAKPOINTS: $500, $2,000, $7,500
ENTRY POINT: $2,000

H079 BRANCHPOINT: IF R OWNS {BOTH MOBILE HOME AND SITE} (H014=1), GO TO H093 BRANCHPOINT

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 BRANCHPOINT
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?

[IWER: USE 0 FOR NOTHING]
[IWER: DO NOT PROBE DK/RF]

| AMOUNT | 0 | DK | RF |

GO TO H083
GO TO H085 BRANCHPOINT

H080-H082 Unfolding Sequence
Question text: Does it amount to less than $____ per month, more than $____ per month, or what?

PROCEDURE: 1Up1Down
BREAKPOINTS: $200, $500, $1,000
ENTRY POINT: $500

H083 BRANCHPOINT: GO TO H085 BRANCHPOINT

H083
PER:

1. WEEK  2. 2 X MONTH  3. MONTH  4. QUARTER
5. 6 MONTH  6. YEAR  7. OTHER (SPECIFY)  8. DK  9. RF

H085 BRANCHPOINT: IF R DID NOT CHANGE MAIN RESIDENCE SINCE HH’s LAST IW (X033=5), GO TO H093 BRANCHPOINT
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
H085
Do you rent it furnished or unfurnished?

1. FURNISHED
3. PARTIALLY FURNISHED [VOL]
5. UNFURNISHED
8. DK
9. RF

H086
Are heat and electricity included in your rent?

[IWER: PROBE FOR WHICH]

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

H087 BRANCHPOINT: IF R {OWNS or RENTS} {HOME or MOBILE HOME SITE} {(H004={1 or 2 or 3}) or (H008={1 or 2 or 3}) or (H014={1 or 2 or 3 or 4})}, GO TO H093 BRANCHPOINT

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

H087
Is your (house or apartment/house/apartment) in MAIN RESIDENCE CITY, STATE (STATE ABBREVIATION) part of a public or subsidized housing complex?

1. YES
5. NO
8. DK
9. RF

H088
[IWER: 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
8. DK
9. RF

GO TO H092
**H089**

What is that person’s relationship to you?

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

1. CHILD  
2. CHILD-IN-LAW  
3. GRANDCHILD  
4. PARENT  

5. OTHER RELATIVE (SPECIFY)  
6. OTHER PERSON (SPECIFY)  
7. ORGANIZATION OR INSTITUTION  
8. DK  
9. RF

**H090**

GO TO H092

**H091/H199 H091**

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

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

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

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<tr>
<th>CHILD NAME(S)</th>
<th>[DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]</th>
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<tr>
<td>03. THROUGH 42. CHILD NAME(S)</td>
<td>[ROWS PROVIDED BY BLAISE AS NECESSARY]</td>
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<tr>
<td>92. DECEASED CHILD</td>
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<tr>
<td>93. ALL CHILDREN</td>
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<td>98. DK</td>
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**NOTE:** NAMES OF CHILDREN ARE DISPLAYED. THE IWER MAY SELECT AS MANY NAMES AS APPLY, AS WELL AS "DECEASED CHILD".

**H092**

Did you ever own this [mobile home site/home]?  
1. YES  
5. NO  
8. DK  
9. RF
H093 BRANCHPOINT: IF R LIVES ON FARM/RANCH (H001=1), GO TO H135 BRANCHPOINT
IF R DID NOT REPORT THAT LIVES IN MOBILE HOME (H002 NOT 1),
GO TO H100 BRANCHPOINT

H093
Do you belong to a park association?

1. YES  5. NO  8. DK  9. RF

GO TO H100 BRANCHPOINT

H094
What are the park association fees?

[IWER: DO NOT PROBE DK/RF]
[IWER: USE 0 FOR NOTHING]

AMOUNT

0  DK  RF

GO TO H098
GO TO H100
BRANCHPOINT

H095-H097 Unfolding Sequence
Question text: Do they amount to less than $____ per month, more than
$____ per month, or what?

PROCEDURE: 2Up1Down
BREAKPOINTS: $25, $125, $500, $1,200
ENTRY POINT: $125

H098 BRANCHPOINT: GO TO H100 BRANCHPOINT

H098
PER:

1. WEEK  2. 2 X MONTH  3. MONTH  4. QUARTER

5. 6 MONTH  6. YEAR  7. OTHER (SPECIFY)  8. DK  9. RF

H099

H100 BRANCHPOINT: IF R LIVES ON FARM/RANCH (H001=1), GO TO H135 BRANCHPOINT
IF THIS IS A REINTERVIEW HH and R DID NOT CHANGE MAIN
RESIDENCE SINCE HH’s LAST IW (X033=5), GO TO H115
BRANCHPOINT
H100
Is your (house or apartment/house/apartment) part of a condominium, co-op, or housing association?

1. YES  5. NO  8. DK  9. RF

H101
Is your (house or apartment/house/apartment) part of a retirement community, senior citizens’ housing, or some other type of housing that offers services for older or disabled adults?

[IWER: ENTER ‘NO’ IF R VOLUNTEERS THAT NO SERVICES ARE OFFERED OTHER THAN MAINTENANCE]

1. YES  5. NO  7. YES, OTHER (SPECIFY)  8. DK  9. RF

H196 (Tag#=H101.5)
[(IWER: PROBE FOR WHICH)]

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

1. YES  5. NO  8. DK  9. RF

GO TO H108
H103
About how much was that?

[IWER: DO NOT PROBE DK/RF]
[IWER: USE 0 FOR NOTHING]

DK RF

AMOUNT

GO TO H108

H104-H106 Unfolding Sequence
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 8. DK 9. RF

GO TO H115 BRANCHPOINT
H109

About how much is that?

[IWER: DO NOT PROBE DK/RF]
[IWER: USE 0 FOR NOTHING]

0 DK RF

AMOUNT

GO TO H110  GO TO H115 BRANCHPOINT

H112-H114 Unfolding Sequence

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 H115 BRANCHPOINT

H110

PER:

1. WEEK  2. 2 X MONTH  3. MONTH  4. QUARTER

5. 6 MONTH  6. YEAR  7. OTHER (SPECIFY)  8. DK  9. RF

H115 BRANCHPOINT: IF THIS IS A REINTERVIEW HH (X024=1) and HH HAS NOT CHANGED MAIN RESIDENCE SINCE HH’s LAST IW (X033=5) and R DID NOT REPORT IN LAST IW THAT LIVES IN RETIREMENT/SENIOR CITIZEN/OTHER HOUSING WITH SERVICES (X089 NOT 1), GO TO H135 BRANCHPOINT

IF R DOES NOT LIVE IN RETIREMENT/SENIOR CITIZEN/OTHER HOUSING WITH SERVICES (H101=5), GO TO H135 BRANCHPOINT
H115
IF REINTERVIEW R LIVED IN RETIREMENT COMMUNITY IN LAST WAVE (Z144=1) and
HH HAS NOT MOVED SINCE THEN (X033=5):
Our records indicate that you live in a retirement community which
provides special services.

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  3. [VOL] R DISPUTES RECORD  4. NO SERVICES OFFERED  5. NO  8. DK  9. RF

GO TO H135 BRANCHPOINT

GO TO H118

H116
Do you pay extra if you use this service?

1. YES  5. NO  8. DK  9. RF

H117
Do you (or your [husband/wife/partner]) use it now?

1. YES  5. NO  8. DK  9. RF

H118
(Does the place you live offer) transportation services?

1. YES  5. NO  8. DK  9. RF

GO TO H121

H119
Do you pay extra if you use this service?

1. YES  5. NO  8. DK  9. RF

H120
Do you (or your [husband/wife/partner]) use it now?

1. YES  5. NO  8. DK  9. RF
H121  (Does the place you live offer) help with housekeeping chores?

1. YES  5. NO  8. DK  9. RF

GO TO H124

H122  Do you pay extra if you use this service?

1. YES  5. NO  8. DK  9. RF

H123  Do you (or your [husband/wife/partner]) use it now?

1. YES  5. NO  8. DK  9. RF

H124  (Does the place you live offer) help with bathing, dressing or eating?

1. YES  5. NO  8. DK  9. RF

GO TO H127

H125  Do you pay extra if you use this service?

1. YES  5. NO  8. DK  9. RF

H126  Do you (or your [husband/wife/partner]) use it now?

1. YES  5. NO  8. DK  9. RF

H127  (Does the place you live offer) an emergency call button or check on residents?

1. YES  5. NO  8. DK  9. RF

GO TO H130

H128  Do you pay extra if you have this service?

1. YES  5. NO  8. DK  9. RF
H129
Do you (or your [husband/wife/partner]) have it now?

1. YES  5. NO  8. DK  9. RF

H130
(Does the place you live offer) Nursing care or an on-site nurse?

1. YES  5. NO  8. DK  9. RF

GO TO H134 BRANCHPOINT

H131
Is there a special resident facility for people who need nursing care?

1. YES  5. NO  8. DK  9. RF

H132
Do you pay extra if you use the nursing care service?

1. YES  5. NO  8. DK  9. RF

H133
Do you (or your [husband/wife/partner]) use the nursing care service now?

1. YES  5. NO  8. DK  9. RF

H134 BRANCHPOINT: IF R IS CURRENTLY IN NURSING HOME (A028=1), GO TO H135 BRANCHPOINT

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  8. DK  9. RF

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

H135
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 story, or more than two stories?
1. SINGLE STORY  
2. TWO STORIES  
3. THREE OR MORE STORIES  
8. DK  
9. RF  

GO TO H139  
BRANCHPOINT

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  
Does it have an elevator?  

1. YES  
2. STAIR LIFT [VOL]  
5. NO  
8. DK  
9. RF

H137  
Is all your living space on one floor?  

1. YES  
5. NO  
8. DK  
9. RF  

GO TO H139  
BRANCHPOINT

H138  
Does your home have bathroom facilities on all floors?  

1. YES  
5. NO  
8. DK  
9. 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 here in [MONTH (per A25a/B040), YEAR (per A25/B039) MOVED TO MAIN RESIDENCE/YEAR MOVED (per B039)]]/Since FINANCIAL R’s LAST IW MONTH (per X038), YEAR (per X039)/In the last two years] have you modified your [house/apartment] to make it easier or safer for an older person or a disabled person to live there?

1. YES  3. ALREADY HANDICAP ACCESSIBLE  5. NO  8. DK  9. RF

H140 BRANCHPOINT: IF R HAS NOT MODIFIED HOME FOR OLDER/DISABLED PERSON IN LAST 2 YEARS (H139 NOT 1) and HAS NOT CHANGED MAIN RESIDENCE SINCE HH’s LAST IW (X033=5), GO TO H146 BRANCHPOINT

H140

Sometimes buildings have special features to help older or disabled persons get around.

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

1. YES  5. NO  8. DK  9. RF

GO TO H143

H141

Which special features does it have?

[IWER: CHOOSE ALL THAT APPLY]

1. RAMP  2. RAILINGS  3. MODIFICATIONS FOR A WHEELCHAIR  4. OTHER (SPECIFY)  8. DK  9. RF

H142
H143
How about special features to safeguard older or disabled persons — 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  
8. DK  
9. RF  

GO TO H146 BRANCHPOINT

H144
What special features does it have to help safeguard older or disabled people?

[IWER: CHOOSE ALL THAT APPLY]

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

H146 BRANCHPOINT: IF R 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
Do you have your own kitchen?

[IWER: 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  
8. DK  
9. RF

H147
How many rooms are there in your home, not counting bathrooms, hallways, or unfinished basements?

DK  
RF

NUMBER OF ROOMS
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  8. DK  9. RF

H149: If you (or your [husband/wife/partner]) had a serious health problem that limited your ability to get around, how easy or difficult would it be to make changes in the layout of your home so you could continue to live there?

Would it be fairly easy or fairly difficult?

1. FAIRLY EASY  2. FAIRLY DIFFICULT  6. [VOL] NO CHANGES NEEDED/ALREADY HANDICAP ACCESSIBLE  8. DK  9. 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 that neighborhood is excellent, very good, good, fair or poor?

1. EXCELLENT  2. VERY GOOD  3. GOOD  4. FAIR
5. POOR  8. DK  9. RF

H151: Not including investment property, do you (or your [husband/wife/partner]) own a second home or condo or own timeshares in one?

1. YES  5. NO  8. DK  9. RF

GO TO H192 (H ASSIST)
H152
About how many weeks a year do you use it?

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

WEEKS

H153
In what state is it located?

STATE

97. OTHER COUNTRY (SPECIFY)  98. DK  99. RF

H154
In what country is it located?

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

H155
In what year did you acquire it?

YEAR

H156
Do you own all of it, part of it, or timeshares in it?

1. ALL  2. PART  3. TIMESHARE  8. DK  9. RF

GO TO H162  GO TO H161  GO TO H162
H157
What percent do you (and your [husband/wife/partner]) own?

[IWER: DO NOT PROBE DK/RF]
[IWER: USE 0 FOR NOTHING]

_________________________       DK       RF
          PERCENT

GO TO H162

H158-H160 Unfolding Sequence
Question text: Is it less than ____%, more than ____%, or what?

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

H029 BRANCHPOINT: GO TO H162

H161
How many weeks of timeshares do you (and your [husband/wife/partner]) have?

______________________       DK       RF
          WEEKS
H162
What was the purchase price?

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

[IWER: DO NOT PROBE DK/RF]

[IWER: USE 0 FOR NOTHING]

[ ] AMOUNT

DK RF

GO TO H166

H163-H165 Unfolding Sequence
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
What is [its present value/the present value of your part of it]? I mean, about what would it bring if it were sold today?

[IWER: DO NOT PROBE DK/RF]

[IWER: USE 0 FOR NOTHING]

[ ] AMOUNT

DK RF

GO TO H170

H167-H169 Unfolding Sequence
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
H170
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.

[IWER: IF R SAYS THEY REFINANCED THE MORTGAGE, TREAT IT AS A MORTGAGE]
[IWER: CHOOSE ALL THAT APPLY]
1. YES, MORTGAGE/LAND CONTRACT
2. YES, 2ND MORTGAGE
3. YES, OTHER LOANS
5. NO
8. DK
9. RF
GO TO H182

H171
(Taking all mortgages and loans together,) about how much do you owe on your second home?

[IWER: DO NOT PROBE DK/RF]
[IWER: USE 0 FOR NOTHING]

AMOUNT
DK
RF
GO TO H175

H172-H174 Unfolding Sequence
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]?
[IWER: DO NOT PROBE DK/RF]
[IWER: USE 0 FOR NOTHING]

<table>
<thead>
<tr>
<th>AMOUNT</th>
<th>0</th>
<th>DK</th>
<th>RF</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO H179</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GO TO H182</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

H176-H178 Unfolding Sequence
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 BRANCHPOINT: GO TO H181

H179
PER:

<table>
<thead>
<tr>
<th>1. WEEK</th>
<th>2. 2 X MONTH</th>
<th>3. MONTH</th>
<th>4. QUARTER</th>
</tr>
</thead>
<tbody>
<tr>
<td>5. 6 MONTH</td>
<td>6. YEAR</td>
<td>7. OTHER (SPECIFY)</td>
<td>8. DK</td>
</tr>
</tbody>
</table>

H180

H181
Do the payments include property taxes or insurance? (Which?)

<table>
<thead>
<tr>
<th>1. TAXES ONLY</th>
<th>2. INSURANCE ONLY</th>
<th>3. BOTH</th>
<th>5. NO, NEITHER</th>
<th>8. DK</th>
<th>9. RF</th>
</tr>
</thead>
</table>
H182
Does the deed to this property have anyone's name on it besides yours
(or your [husband/wife/partner]'s)?

1. YES  5. NO  8. DK  9. RF

GO TO H186

H183
What is that person's relationship to you?

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

1. CHILD  2. CHILD-IN-LAW  3. GRANDCHILD  4. PARENT

GO TO H186

5. OTHER
RELATIVE
(SPECIFY)

6. OTHER PERSON
(SPECIFY)

7. ORGANIZATION
OR INSTITUTION

8. DK  9. RF

H184

H197
(Tag#=H184.5)

GO TO H186
H185/H200_H185
IF CHILD (H183=1):
Which child is that?

IF CHILD-IN-LAW (H182=2):
Which of your children is married to [him/her]?

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

<table>
<thead>
<tr>
<th>CHILD NAME(S)</th>
<th>[DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]</th>
</tr>
</thead>
<tbody>
<tr>
<td>03. THROUGH 42. CHILD NAME(S)</td>
<td></td>
</tr>
<tr>
<td>[ROWS PROVIDED BY BLAISE AS NECESSARY]</td>
<td></td>
</tr>
<tr>
<td>92. DECEASED CHILD</td>
<td></td>
</tr>
<tr>
<td>93. ALL CHILDREN</td>
<td></td>
</tr>
<tr>
<td>98. DK</td>
<td></td>
</tr>
<tr>
<td>99. RF</td>
<td></td>
</tr>
</tbody>
</table>

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

H186
What were the real estate taxes in LAST CALENDAR YEAR on that second home?

[IWER: DO NOT PROBE DK/RF]

[IWER: USE 0 FOR NOTHING]

[IWER: USE [ALT-D] IF NOT SURE BECAUSE INCLUDED IN MORTGAGE OR FEES]

__________________________
AMOUNT

__________________________
DK

__________________________
RF

GO TO H190

H187-H189 Unfolding Sequence
Question text: Did they amount to less than $____ , more than $____ , or what?

PROCEDURE: 1Up1Down
BREAKPOINTS: $500, $3,000, $10,000
ENTRY POINT: $3,000
H190 
Do you think of it as a place that will eventually be your main residence?
1. YES  5. NO  7. OTHER (SPECIFY)  8. DK  9. RF

H192
H ASsist
IWER:
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