

H000_SectionIntro

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 (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)

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

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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

** IN 2014 THIS ALTERNATE WAVE VARIABLE IS SET TO NOT ASK QUESTIONS **

* 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 AN EXIT INTERVIEW, GO TO SECTION J

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 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_FarmRanch

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
DK
RF

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H002_TypeHome

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

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

- 1. MOBILE HOME, GO TO H008 BRANCHPOINT
- 2. ONE-FAMILY HOUSE
- 3. TWO-FAMILY HOUSE/DUPLEX
- 4. APARTMENT/TOWNHOUSE
- 7. OTHER (SPECIFY)
- DK
- RF

H003 BRANCHPOINT: IF H002 NOT OTHER (H002 NOT 7), GO TO H004 BRANCHPOINT

H003STypeHome_S

Other (specify)

OTHER (SPECIFY) _____
OPEN

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

H004_OwnRent

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

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

H005 BRANCHPOINT: IF H004 NOT OTHER (H004 NOT 7), GO TO H006 BRANCHPOINT

H005SOwnRent_S

Other (specify)

OTHER (SPECIFY) _____ GO TO H086 BRANCHPOINT
OPEN

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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_OwnBldg

Do you own the entire building or just your unit?

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

H007_

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

[IWER: ENTER 1 TO CONTINUE]

- 1. CONTINUE
-

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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_OwnFarm

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, GO TO H013
- 2. OWNS PART
- 3. RENTS, GO TO H079
- 7. OTHER (SPECIFY)
- DK, GO TO H086 BRANCHPOINT
- RF, GO TO H086 BRANCHPOINT

H009 BRANCHPOINT: IF H008 NOT OTHER (H008 NOT 7), GO TO H010

H009SOwnFarm_S

Other (specify)

OTHER (SPECIFY)_____, GO TO H086 BRANCHPOINT
OPEN

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H010_

Now I'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?

PERCENT

DK
RF

H011_OwnFarmLand

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_FarmPayRent

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

1. YES, PAY RENT

5. NO, OTHER

DK

RF

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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

H020_HomeValue1st

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]

_____, GO TO H326 BRANCHPOINT
AMOUNT

DK
RF

HRS 2014 - Section H

H021

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
[1 (NOT 1 and NOT 2) (\$150,000)] AT X053

H326 BRANCHPOINT: IF SAME REPORTER AS LAST WAVE or DIFFERENCE IN VALUE {BETWEEN CURRENT WAVE AND LAST WAVE} IS NOT MORE THAN \$50,000 (Z155/Z156-H020 NOT >\$50,000), GO TO H014 BRANCHPOINT

H326_HomeValue1stCONFIRM

Let me just confirm, you said the value of your home is {AMOUNT per H020 in English}, is that correct?

1. YES, GO TO H014 BRANCHPOINT
5. NO
DK, GO TO H014 BRANCHPOINT
RF, GO TO H014 BRANCHPOINT

H327_HomeValue2st

What is the present value of your home?
(What would it bring if it were sold today?)

[IWER: DO NOT PROBE DK/RF]

[IWER: USE 0 FOR NOTHING]

AMOUNT

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_OwnMobile

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, GO TO H079
7. NEITHER OWNS NOR RENTS, GO TO H086 BRANCHPOINT
DK, GO TO H086 BRANCHPOINT
RF, GO TO H086 BRANCHPOINT

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H015_

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

1. CONTINUE

H016_MobileValue

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]

_____, GO TO H024
AMOUNT
DK
RF

H017

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

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H024MHaveMortgage

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: IF R HAS A REVERSE MORTGAGE, ENTER 4]

[IWER: CHOOSE ALL THAT APPLY]

- 1. YES, MORTGAGE/ LAND CONTRACT
 - 2. YES, 2ND MORTGAGE, GO TO H036 BRANCHPOINT UNLESS 1 WAS ALSO SELECTED
 - 3. YES, OTHER LOANS, GO TO H036 BRANCHPOINT UNLESS 1 WAS ALSO SELECTED
 - 4. R HAS REVERSE MORTGAGE, GO TO H036 BRANCHPOINT
 - 5. NO, GO TO H036 BRANCHPOINT
 - DK, GO TO H036 BRANCHPOINT
 - 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]

_____, GO TO H029
AMOUNT
0, GO TO H032
DK
RF

HRS 2014 - Section H

H026

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_

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

[IWER: DO NOT PROBE DK/RF]

Per:

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

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H030 BRANCHPOINT: IF N029 NOT OTHER (H029 NOT 7), GO TO H031

H030S

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

OTHER (SPECIFY) _____
OPEN

H031_

Do the payments include property taxes or insurance?

(Which?)

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

HRS 2014 - Section H

H032_

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

[IWER: DO NOT PROBE DK/RF]

[IWER: USE 0 FOR NOTHING]

_____, GO TO H036 BRANCHPOINT
AMOUNT

DK
RF

H033

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

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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 your second mortgage?

[IWER: DO NOT PROBE DK/RF]

[IWER: USE 0 FOR NOTHING]

_____, GO TO H040
AMOUNT

0, GO TO H042
DK
RF

H037

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

HRS 2014 - Section H

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)
- DK
- RF

H41 BRANCHPOINT: IF N040 NOT OTHER (H040 NOT 7), GO TO H042

H041S

Other (Specify):

OPEN

HRS 2014 - Section H

H042_

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

[IWER: DO NOT PROBE DK/RF]

[IWER: USE 0 FOR NOTHING]

_____, GO TO H046 BRANCHPOINT
AMOUNT

DK
RF

H043

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

HRS 2014 - Section H

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]

_____, GO TO H050

AMOUNT

0, GO TO H052

DK

RF

H047

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

HRS 2014 - Section H

H050 BRANCHPOINT: GO TO H052

H050_

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

[IWER: DO NOT PROBE DK/RF]

Per:

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

H51 BRANCHPOINT: IF N050 NOT OTHER (H050 NOT 7), GO TO H052

H051S

Other (specify):

OPEN

HRS 2014 - Section H

H052_

About how much do you still owe on that loan?

[IWER: DO NOT PROBE DK/RF]

[IWER: USE 0 FOR NOTHING]

_____, GO TO H056
AMOUNT

DK
RF

H053

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

HRS 2014 - Section H

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, GO TO H066 BRANCHPOINT
DK, GO TO H066 BRANCHPOINT
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]

_____, GO TO H061
AMOUNT
DK
RF

HRS 2014 - Section H

H058

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, GO TO H066 BRANCHPOINT
DK, GO TO H066 BRANCHPOINT
RF, GO TO H066 BRANCHPOINT

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H062_

About how much is currently owed?

[IWER: DO NOT PROBE DK/RF]

[IWER: USE 0 FOR NOTHING]

_____, GO TO H066 BRANCHPOINT
AMOUNT

DK
RF

H063

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

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H066 BRANCHPOINT: IF THIS IS A REINTERVIEW HH (X024=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]

_____, GO TO H70
AMOUNT

DK
RF

H067

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
[1 (NOT 1 and NOT 2) (\$80,000)] AT X512

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H070_

In what year did you acquire it?

| |
|---------------|
| _____ YEAR |
| 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 2012 WAVE AND WILL BE ASKED AGAIN IN 2016, BUT WILL NOT BE ASKED IN 2014.

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, GO TO H075 |
| DK, GO TO H075 |
| RF, GO TO H075 |

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H072_

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

[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)
- 6. OTHER PERSON (SPECIFY)
- 7. ORGANIZATION OR INSTITUTION, GO TO H075
- DK, GO TO H075
- RF, GO TO H075

H073 BRANCHPOINT: IF H072 NOT OTHER RELATIVE (H072 NOT 5), GO TO H194 BRANCHPOINT

H073SRelDeedOthRel_S

OTHER RELATIVE (SPECIFY)

_____, GO TO H075
OPEN

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H194 BRANCHPOINT: IF H072 NOT OTHER PERSON (H072 NOT 6), GO TO H074

H194SRelDeedOthPer_S

OTHER PERSON (SPECIFY)

_____, GO TO H075
OPEN

H198_H074_temp

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]
03. THROUGH 52. CHILD NAME(S)
[ROWS PROVIDED BY BLAISE AS NECESSARY]
92. DECEASED CHILD
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 "DECEASED CHILD".

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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 FEES, ENTER DK]

[IWER: DO NOT PROBE DK/RF]

[IWER: USE 0 FOR NOTHING]

_____, GO TO H079 BRANCHPOINT
AMOUNT

DK
RF

H076

H076-H078 Unfolding Sequence

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

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

_____, GO TO H083
AMOUNT

0, GO TO H086 BRANCHPOINT
DK
RF

H080

H080-H082 Unfolding Sequence

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

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H083 BRANCHPOINT: GO TO H086 BRANCHPOINT

H083_

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

[IWER: DO NOT PROBE DK/RF]

Per:

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

H084 BRANCHPOINT: IF OTHER AT H083 (H083=7), GO TO H086 BRANCHPOINT

H084S

Other (Specify)

OPEN

HRS 2014 - Section H

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 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

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
- DK
- 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 H100 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
- DK
- RF

HRS 2014 - Section H

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, GO TO H092
 - DK, GO TO H092
 - RF, GO TO H092
-

H089_

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

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

- 1. CHILD
 - 2. CHILD-IN-LAW
 - 3. GRANDCHILD
 - 4. PARENT, GO TO H092
 - 5. OTHER RELATIVE (SPECIFY)
 - 6. OTHER PERSON (SPECIFY)
 - 7. ORGANIZATION OR INSTITUTION, GO TO H092
 - DK, GO TO H092
 - RF, GO TO H092
-

HRS 2014 - Section H

H090 BRANCHPOINT: IF H089 NOT OTHER RELATIVE (H089 NOT 5), GO TO H195 BRANCHPOINT

H090SRelOwnHomeOth_S

OTHER RELATIVE (SPECIFY)

_____, GO TO H092
OPEN

H195 BRANCHPOINT: IF H089 NOT OTHER PERSON (H089 NOT 6), GO TO H091

H195SRelOwnHomePer_S

OTHER PERSON (SPECIFY)

_____, GO TO H092
OPEN

HRS 2014 - Section H

H199_H091_Temp

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?

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

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
DK
RF

HRS 2014 - Section H

H100 BRANCHPOINT: IF R LIVES ON FARM/RANCH (H001=1), GO TO H135 BRANCHPOINT

IF THIS IS A REINTERVIEW HH and HH HAS NOT CHANGED MAIN RESIDENCE SINCE HH's LAST IW (X033=5), GO TO H115 BRANCHPOINT

H100_HousingAssoc

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

1. YES
5. NO
DK
RF

H101_SeniorComplex

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 adults or someone with a disability?

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

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

HRS 2014 - Section H

H196 BRANCHPOINT: IF H101 NOT OTHER (H101 NOT 7), GO TO H102 BRANCHPOINT

H196SSeniorComplex_S

Other (specify)

[IWER: PROBE FOR WHICH]

OPEN

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 H115 BRANCHPOINT

H102_

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

HRS 2014 - Section H

H103_

About how much was that?

[IWER: DO NOT PROBE DK/RF]

[IWER: USE 0 FOR NOTHING]

_____, GO TO H108
AMOUNT

DK
RF

H104

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

HRS 2014 - Section H

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 H115 BRANCHPOINT
DK, GO TO H115 BRANCHPOINT
RF, GO TO H115 BRANCHPOINT

H109_

About how much is that?

[IWER: DO NOT PROBE DK/RF]

[IWER: USE 0 FOR NOTHING]

_____, GO TO H110
AMOUNT
0, GO TO H115 BRANCHPOINT
DK
RF

HRS 2014 - Section H

H112

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_

(About how much is that?)

[IWER: DO NOT PROBE DK/RF]

PER:

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

HRS 2014 - Section H

H111 BRANCHPOINT: IF H110 NOT OTHER (H110 NOT 7), GO TO H115 BRANCHPOINT

H111S

Other (Specify):

OPEN

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 (X089=1) and {HH HAS NOT CHANGED MAIN RESIDENCE SINCE HH's LAST IW (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, GO TO H135 BRANCHPOINT
- 4. NO SERVICES OFFERED, GO TO H135 BRANCHPOINT
- 5. NO, GO TO H118
- DK, GO TO H118
- RF, GO TO H118

HRS 2014 - Section H

H116_

Do you pay extra if you use this service?

- 1. YES
 - 5. NO
 - DK
 - RF
-

H117_

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
-

HRS 2014 - Section H

H119_

Do you pay extra if you use this service?

- 1. YES
 - 5. NO
 - DK
 - RF
-

H120_

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
-

HRS 2014 - Section H

H122_

Do you pay extra if you use this service?

- 1. YES
 - 5. NO
 - DK
 - RF
-

H123_

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
-

HRS 2014 - Section H

H125_

Do you pay extra if you use this service?

- 1. YES
- 5. NO
- DK
- RF

H126_

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

HRS 2014 - Section H

H128_

Do you pay extra if you have this service?

- 1. YES
- 5. NO
- DK
- RF

H129_

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 BRANCHPOINT
- DK, GO TO H134 BRANCHPOINT
- RF, GO TO H134 BRANCHPOINT

HRS 2014 - Section H

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
-

HRS 2014 - Section H

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
- 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_NumStories

[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

HRS 2014 - Section H

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
 - DK
 - RF
-

H137_

Is all your living space on one floor?

- 1. YES, GO TO H139 BRANCHPOINT
 - 5. NO
 - DK
 - RF
-

H138_

Does your home have bathroom facilities on all floors?

- 1. YES
 - 5. NO
 - DK
 - RF
-

HRS 2014 - Section H

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 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/apartment] 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

H140 BRANCHPOINT: IF THIS IS A REINTERVIEW HH and R HAS NOT MODIFIED CURRENT HOME FOR OLDER/DISABLED PERSON SINCE LAST IW/IN LAST 2 YEARS (H139 NOT 1) and HH 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 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

HRS 2014 - Section H

H141M

Which special features does it have?

[IWER: CHOOSE ALL THAT APPLY]

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

H142 BRANCHPOINT: IF H141 NOT OTHER (H141 NOT 4), GO TO H143

H142S

Other (specify)

OPEN

HRS 2014 - Section H

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 to help safeguard older people or someone with a disability?

[IWER: CHOOSE ALL THAT APPLY]

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

H145 BRANCHPOINT: IF H144 NOT OTHER (H144 NOT 3), GO TO H203 BRANCHPOINT

H145S

Other (specify)

OPEN

HRS 2014 - Section H

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

H203_

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]?

[IWER: DO NOT PROBE DK/RF]

_____, GO TO H146 BRANCHPOINT
AMOUNT
DK
RF

HRS 2014 - Section H

H205

H205-H207 Unfolding Sequence

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_

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
DK
RF

HRS 2014 - Section H

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

HRS 2014 - Section H

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
 - DK
 - RF
-

H151_Own2ndHome

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, GO TO H301 BRANCHPOINT
 - DK, GO TO H301 BRANCHPOINT
 - RF, GO TO H301 BRANCHPOINT
-

HRS 2014 - Section H

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

DK
RF

H201_H153_ | StateList.LOOKUP.StateName

In what state is it located?

STATE

97. OTHER COUNTRY (SPECIFY)
DK
RF

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

HRS 2014 - Section H

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

H154S

In what country is it located?

OTHER COUNTRY (SPECIFY) _____
OPEN

H155_

In what year did you acquire it?

YEAR
DK
RF

H156_OwnHome2nd

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

HRS 2014 - Section H

H157_

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

[IWER: DO NOT PROBE DK/RF]

[IWER: USE 0 FOR NOTHING]

_____, GO TO H162
PERCENT

DK
RF

H158

H158-H160 Unfolding Sequence

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

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

HRS 2014 - Section H

H161 BRANCHPOINT: GO TO H162

H161_

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

WEEKS

DK
RF

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]

_____, GO TO H166
AMOUNT

DK
RF

HRS 2014 - Section H

H163

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_HomeValue2nd

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]

_____, GO TO H170
AMOUNT

DK
RF

HRS 2014 - Section H

H167

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

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.

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

[IWER: IF R HAS A REVERSE MORTGAGE, ENTER 4]

[IWER: CHOOSE ALL THAT APPLY]

1. YES, MORTGAGE/ LAND CONTRACT
2. YES, 2ND MORTGAGE
3. YES, OTHER LOANS
4. R HAS REVERSE MORTGAGE, GO TO H182
5. NO, GO TO H182
DK, GO TO H182
RF, GO TO H182

HRS 2014 - Section H

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]

_____, GO TO H175
AMOUNT

DK
RF

H172

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

HRS 2014 - Section H

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]

_____, GO TO H179

AMOUNT

0, GO TO H182

DK

RF

H176

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

HRS 2014 - Section H

H179 BRANCHPOINT: GO TO H181

H179_

PER:

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

H180 BRANCHPOINT: IF H179 NOT OTHER (H179 NOT 7), GO TO H181

H180S

Other (Specify):

OPEN

HRS 2014 - Section H

H181_

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 2008 WAVE AND WILL BE ASKED AGAIN IN 2012, BUT WILL NOT BE ASKED IN 2010.

H182_2nd_OtrNameDeed

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

HRS 2014 - Section H

H183_

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

[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, GO TO H186
- DK, GO TO H186
- RF, GO TO H186

H184 BRANCHPOINT: IF H183 NOT OTHER RELATIVE (H183 NOT 5), GO TO H197 BRANCHPOINT

H184SReIDeed2HRela_S

OTHER RELATIVE (SPECIFY)

_____, GO TO H186
OPEN

HRS 2014 - Section H

H197 BRANCHPOINT: IF H183 NOT OTHER PERSON (H183 NOT 6), GO TO H185

H197SRelDeed2HPer_S

OTHER PERSON (SPECIFY)

_____, GO TO H186
OPEN

H200_H185_Temp

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?

CHILD NAME(S)[DISPLAYED BY BLAISE FROM PREVIOUS RESPONSES]
03. THROUGH 52. CHILD NAME(S)
[ROWS PROVIDED BY BLAISE AS NECESSARY]
92. DECEASED CHILD
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 "DECEASED CHILD".

HRS 2014 - Section H

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

_____, GO TO H301 BRANCHPOINT
AMOUNT

DK
RF

H187

H187-H189 Unfolding Sequence

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
[1 (NOT 1 and NOT 2) (\$10,000)] AT X515

HRS 2014 - Section H

H301 BRANCHPOINT: IF THIS IS A REINTERVIEW HH and HH HAS NOT CHANGED MAIN RESIDENCE SINCE HH's LAST IW (X033=5) and IN 2010 CORRECTLY RECORDED AS NOT CHANGED MAIN RESIDENCE (X100 NOT 1) and R OWNS PRIMARY RESIDENCE {{{H004 or H011}=1} or (H008={1 or 2}) or (H014={1 or 3}}), CONTINUE WITH H301

OTHERWISE, GO TO W351

H301_

READ TO Rs WHO OWN A 2ND HOME (H151=1):

I have just a few more questions about your home in MAIN RESIDENCE CITY, STATE (STATE ABBREVIATION).

READ TO ALL:

Since we last spoke with you in [FINANCIAL R's LAST IW MONTH, YEAR/in the last two years], has the value of your home gone up, gone down, or stayed about the same?

[IWER: WE'RE INTERESTED IN THE CURRENT VALUE COMPARED TO THE VALUE [IN FINANCIAL R's LAST IW MONTH, YEAR/TWO YEARS AGO].]

- 1. GONE UP
 - 3. STAYED THE SAME, GO TO H320 BRANCHPOINT
 - 5. GONE DOWN, GO TO H306
 - DK, GO TO H320 BRANCHPOINT
 - RF, GO TO H320 BRANCHPOINT
-

H302_

Not counting mortgage payments or money you have spent on home repairs or remodeling, have you (or your [husband/wife/partner]) increased your spending on other things because of the increase in your home value?

[IWER: IF R ASKS, MORTGAGE PAYMENT INCLUDES TAXES AND INSURANCE]

- 1. YES
 - 2. YES, BUT NOT BECAUSE OF CHANGE IN HOME VALUE, GO TO H320 BRANCHPOINT
 - 5. NO, GO TO H320 BRANCHPOINT
 - DK, GO TO H320 BRANCHPOINT
 - RF, GO TO H320 BRANCHPOINT
-

HRS 2014 - Section H

H303_

Would you say your spending has gone up more than 10 percent?

- 1. YES, GO TO H305
 - 3. ABOUT 10%, GO TO H320 BRANCHPOINT
 - 5. NO
 - DK, GO TO H320 BRANCHPOINT
 - RF, GO TO H320 BRANCHPOINT
-

H304_

Would you say your spending has gone up more than 5 percent?

- 1. YES, GO TO H320 BRANCHPOINT
 - 3. ABOUT 5%, GO TO H320 BRANCHPOINT
 - 5. NO, GO TO H320 BRANCHPOINT
 - DK, GO TO H320 BRANCHPOINT
 - RF, GO TO H320 BRANCHPOINT
-

H305_

Would you say your spending has gone up more than 20 percent?

- 1. YES, GO TO H320 BRANCHPOINT
 - 3. ABOUT 20%, GO TO H320 BRANCHPOINT
 - 5. NO, GO TO H320 BRANCHPOINT
 - DK, GO TO H320 BRANCHPOINT
 - RF, GO TO H320 BRANCHPOINT
-

HRS 2014 - Section H

H306_

Not counting mortgage payments or money you have spent on home repairs or remodeling, have you (or your [husband/wife/partner]) reduced your spending on other things because of the decline in your home value?

- 1. YES
 - 2. YES, BUT NOT BECAUSE OF CHANGE IN HOME VALUE, GO TO H320 BRANCHPOINT
 - 5. NO, GO TO H320 BRANCHPOINT
 - DK, GO TO H320 BRANCHPOINT
 - RF, GO TO H320 BRANCHPOINT
-

H307_

Would you say your spending has gone down more than 10 percent?

- 1. YES, GO TO H309
 - 3. ABOUT 10%, GO TO H320 BRANCHPOINT
 - 5. NO
 - DK, GO TO H320 BRANCHPOINT
 - RF, GO TO H320 BRANCHPOINT
-

HRS 2014 - Section H

H308_

Would you say your spending has gone down more than 5 percent?

- 1. YES, GO TO H320 BRANCHPOINT
 - 3. ABOUT 5%, GO TO H320 BRANCHPOINT
 - 5. NO, GO TO H320 BRANCHPOINT
 - DK, GO TO H320 BRANCHPOINT
 - RF, GO TO H320 BRANCHPOINT
-

H309_

Would you say your spending has gone down more than 20 percent?

- 1. YES
 - 3. ABOUT 20%
 - 5. NO
 - DK
 - RF
-

H320 BRANCHPOINT: IF R DOES NOT HAVE A MORTGAGE (H024 {NOT 1 and NOT 2}), GO TO W351

H320_

Have you refinanced your mortgage [since FINANCIAL R's LAST IW MONTH, YEAR/in the last two years]?

- 1. YES
 - 5. NO, GO TO W351
 - DK, GO TO W351
 - RF, GO TO W351
-

HRS 2014 - Section H

H321_

Why did you refinance your mortgage?

[IWER: CHOOSE ALL THAT APPLY]

- 1. TO GET A LOWER INTEREST RATE
- 2. TO REDUCE THE AMOUNT OF MORTGAGE PAYMENTS
- 3. TO PAY OFF THE MORTGAGE FASTER
- 4. TO PAY OFF A BALLOON MORTGAGE
- 5. TO RAISE CASH FOR OTHER THINGS
- 6. HAD TO/WAS FORCED TO/DIDN'T HAVE A CHOICE
- 7. TO CONSOLIDATE DEBT
- 8. TO GET A FIXED INTEREST RATE
- 97. OTHER (SPECIFY)
- DK
- RF

H322 BRANCHPOINT: IF H321 NOT OTHER (H321 NOT 97), GO TO W351

H322_

Other (Specify):

OPEN

HRS 2014 - Section H

W351

How would you rate the housing market in your area? Would you say it is excellent, very good, good, fair or poor?

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

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 H192 (H ASSIST)

W353

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

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

- 1. YES
- 5. NO, GO TO W359 BRANCHPOINT
- DK, GO TO W359 BRANCHPOINT
- RF, GO TO W359 BRANCHPOINT

W354

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

DEF: FORECLOSURE OF A HOUSE IS 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 BRANCHPOINT: IF R (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 W355

OTHERWISE, GO TO W359 BRANCHPOINT

W355

Did you lose your home because of this?

- 1. YES, GO TO W359 BRANCHPOINT
 - 5. NO, GO TO W359 BRANCHPOINT
 - DK, GO TO W359 BRANCHPOINT
 - RF, GO TO W359 BRANCHPOINT
-

HRS 2014 - Section H

W356

Are you facing possible foreclosure?

DEF: FORECLOSURE OF A HOUSE IS 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

W359 BRANCHPOINT: IF R DID NOT REPORT HAVING A MORTGAGE ((H024 and H170)={NOT 1 and NOT 2}) or HH FELL BEHIND ON MORTGAGE PAYMENTS (W353=1), GO TO H192 (H ASSIST)

W359

How likely is it that you will fall behind in your mortgage payments during the next 6 months -- is it very likely, somewhat likely, or not likely at all?

- 1. VERY LIKELY
- 3. SOMEWHAT LIKELY
- 5. NOT LIKELY AT ALL
- DK
- RF

HRS 2014 - Section H

H192_AssistH

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
-