**NHATS Round 3**

**Section HP [HOME OWNERSHIP]**

**BOX HP1**

BOX HP1 NOT ON FILE

If FACILITY flag = 1 (yes), go to Section IA – Income & Assets.
Otherwise, go to HP1.

**HP1**

**hp3ownrentot**

R3 HP1 OWN RENT OR OTHER

**DISPLAY INSTRUCTIONS:**

If PROXY flag is null or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "Do you".
Otherwise, display "Does SP".

If CURRENT INT SP MARITAL STATUS from PERSON ROSTER = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or [SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME]".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

**QUESTION TEXT:**

{Do you/Does SP} or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME} own the home (apartment/condo) at {SP's [ADDRESS 1, ADDRESS 2] from PERSON ROSTER}, rent it, or is there some other arrangement?

**CODES**

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>OWN</td>
<td>HP6</td>
</tr>
<tr>
<td>2</td>
<td>RENT</td>
<td>HP5</td>
</tr>
<tr>
<td>3</td>
<td>SOME OTHER ARRANGEMENT</td>
<td>HP5</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
<td>HP5</td>
</tr>
<tr>
<td></td>
<td>DON'T KNOW</td>
<td>HP5</td>
</tr>
</tbody>
</table>

**HP2**

**hp3mrtpadoff**

R3 HP2 MORTGAGE PAID OFF

**DISPLAY INSTRUCTIONS:**

If PROXY flag is null or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "your".
Otherwise, display "SP's".

If CURRENT INT SP MARITAL STATUS from PERSON ROSTER = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or [SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME]'s".
If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

**QUESTION TEXT:**

Is {your/SP's} or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}'s mortgage paid off or are monthly mortgage payments still being made?

**IF NEEDED:** Include any payments on a home equity loan or second mortgage.

**CODES**

<p>| | | |</p>
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<thead>
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<tbody>
<tr>
<td>1</td>
<td>PAID OFF</td>
<td>HP4</td>
</tr>
<tr>
<td>2</td>
<td>STILL MAKE PAYMENTS</td>
<td>HP4</td>
</tr>
<tr>
<td>3</td>
<td>REVERSE MORTGAGE</td>
<td>HP4</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
<td>HP4</td>
</tr>
<tr>
<td></td>
<td>DON'T KNOW</td>
<td>HP4</td>
</tr>
</tbody>
</table>
HP3

**hp3mthlymort**

R3 HP3 MORTGAGE PAYMNT EACH MNTH

**QUESTION TEXT:**

How much (altogether) is that each month?

ENTER DOLLAR AMOUNT [HP3B]

**ENTER NUMBER**

Range 1 to 9999
Soft Range 100 to 5000
REFUSED HP3B
DON'T KNOW

**PROGRAMMER INSTRUCTIONS:**

Hard Range: 1-9999
Soft Range: 100-5000

Use input mask in response field ($9,999) so that dollar sign is displayed and commas are inserted appropriately.

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HP3A

**hp3mortpaymt**

R3 HP3A MORTGAGE PAYMENT AMOUNT

**QUESTION TEXT:**

Is it....

**CODES**

1 less than $250,
2 $250-$499,
3 $500-$999, or
4 $1,000 or more?

REFUSED
DON'T KNOW

---

HP3B

**hp3whnpayoff**

R3 HP3B WHEN EXPECT PAY OFF MORTG

**DISPLAY INSTRUCTIONS:**

If PROXY flag is null or PROXY RELATIONSHIP =2 (SPOUSE/PARTNER), display "Do you".
Otherwise, display "Does SP".

If CURRENT INT SP MARITAL STATUS from PERSON ROSTER = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display
"or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}"
If PROXY RELATIONSHIP =2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME"
Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME"

**QUESTION TEXT:**

{Do you/Does SP} (or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}) expect to
pay off the mortgage(s) within 5 years, 10 years, or longer?

**CODES**

1 5 YEARS
2 10 YEARS
3 LONGER THAN 10 YEARS

REFUSED
HP3C hp3amtstlowe

DISPLAY INSTRUCTIONS:
If PROXY flag is null or PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "do you". Otherwise, display "does SP".

If CURRENT INT SP MARITAL STATUS from PERSON ROSTER = 1 (MARRIED) or 2 (LIVING WITH A PARTNER), display "or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}".

If PROXY RELATIONSHIP = 2 (SPOUSE/PARTNER), display "SP FIRSTNAME LASTNAME".

Otherwise, display "SPOUSE/PARTNER FIRSTNAME LASTNAME".

QUESTION TEXT:
About how much {do you/does SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} still owe on the mortgage(s)?

IF NEEDED: The nearest $10,000 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER DOLLAR AMOUNT [HP4]

HP3D hp3amoutowed

QUESTION TEXT:
SHOW CARD HP2
Is the amount owed...

CODES
1 less than $50,000,
2 between $50,000 and $100,000, or
3 over $100,000?
REFUSED
DON'T KNOW

HP4 hp3homevalue

QUESTION TEXT:

What is the present value of this home? I mean, about what would it bring if it was sold today, not counting any loans or outstanding mortgages?

IF NEEDED: Your best guess or the nearest $10,000 is fine.

IF NEEDED: We know questions like these may be difficult to answer, but we need to know this to understand how people manage financially as they age and what effect this might have on their health.

ENTER DOLLAR AMOUNT [SECTION EW]

ENTER NUMBER
- Range: 1 to 999999
- Soft Range: 500 to 900000
- REFUSED: SECTION IA
- DON'T KNOW

PROGRAMMER INSTRUCTIONS:
- Hard Range: 1-999999
- Soft Range: 500-900000

Use input mask in response field ($9,999,999) so that dollar sign is displayed and commas are inserted appropriately.

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<thead>
<tr>
<th>CODE</th>
<th>Description</th>
<th>SECTION</th>
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<tbody>
<tr>
<td>1</td>
<td>less than $50,000,</td>
<td>IA</td>
</tr>
<tr>
<td>2</td>
<td>$50,000-$74,999,</td>
<td>IA</td>
</tr>
<tr>
<td>3</td>
<td>$75,000-$99,999,</td>
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</tr>
<tr>
<td>4</td>
<td>$100,000-$199,999,</td>
<td>IA</td>
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<tr>
<td>5</td>
<td>$200,000-$299,999,</td>
<td>IA</td>
</tr>
<tr>
<td>6</td>
<td>$300,000-$499,999,</td>
<td>IA</td>
</tr>
<tr>
<td>7</td>
<td>$500,000-$749,999, or</td>
<td>IA</td>
</tr>
<tr>
<td>8</td>
<td>$750,000 or more?</td>
<td>IA</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
<td>IA</td>
</tr>
<tr>
<td></td>
<td>DON'T KNOW</td>
<td>IA</td>
</tr>
</tbody>
</table>

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<tr>
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<td>IA</td>
</tr>
<tr>
<td></td>
<td>DON'T KNOW</td>
<td>IA</td>
</tr>
</tbody>
</table>

DISPLAY INSTRUCTIONS:
If PROXY flag is null or PROXY RELATIONSHIP=2 (SPOUSE/PARTNER), display “Do you”. Otherwise, display “Does SP”.

If CURRENT INT SP MARITAL STATUS from PERSON ROSTER = 1 (MARRIED) OR 2 (LIVING WITH A PARTNER), display “or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}”.

If PROXY RELATIONSHIP=2 (SPOUSE/PARTNER), display “SP FIRSTNAME LASTNAME”.
Otherwise, display “SPOUSE/PARTNER FIRSTNAME LASTNAME”.

QUESTION TEXT:
{Do you/Does SP} {or [SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME] pay rent to live here?}
### CODES

<table>
<thead>
<tr>
<th></th>
<th>YES</th>
<th>NO</th>
<th>REFUSED</th>
<th>DON'T KNOW</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
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<tr>
<td>2</td>
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<td></td>
<td>SECTION IA</td>
<td>SECTION IA</td>
</tr>
</tbody>
</table>

### HP6

|   | hp3rentamt | R3 HP6 RENT PAID EACH MONTH |

**QUESTION TEXT:**

How much is each month?

ENTER DOLLAR AMOUNT [BOX HP7]

**ENTER NUMBER**

<table>
<thead>
<tr>
<th>Range</th>
<th>Soft Range</th>
<th>REFUSED</th>
<th>DON'T KNOW</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 to 9999</td>
<td>1 to 3000</td>
<td>HP7</td>
<td></td>
</tr>
</tbody>
</table>

**PROGRAMMER INSTRUCTIONS:**

Hard Range: 0-9999
Soft Range: 1-3000

Use input mask in response field ($9,999) so that dollar sign is displayed and commas are inserted appropriately.

### HP6A

|   | hp3rentamout | R3 HP6A RENT AMOUNT |

**QUESTION TEXT:**

SHOW CARD HP1

Is it….

**CODES**

<table>
<thead>
<tr>
<th></th>
<th>less than $250,</th>
<th>$250-$499,</th>
<th>$500-$999, or</th>
<th>$1,000 or more?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>REFUSED</td>
<td>DON'T KNOW</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### BOX HP7

|   | BOX HP7 | NOT ON FILE |

If HP6>=500 or HP6a=3($500-999) or 4 ($1,000 or more), go to Section IA – Income and Assets.
Otherwise, go to HP7.

### HP7

|   | hp3sec8pubsn | R3 HP7 HME SEC 8 PUBL/SENR HOUS |

**QUESTION TEXT:**

Is this home in Section 8 or public housing or housing for low-income seniors?

**CODES**

<table>
<thead>
<tr>
<th></th>
<th>YES</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>
2

NO
REFUSED
DON'T KNOW

PROGRAMMER INSTRUCTIONS:
Go to Section IA – Income & Assets.