NHATS Round 9

Section HP [HOME OWNERSHIP] Sequence: 35

HP1

hp9ownrent

R9 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".

If HOTYPE flag = 2 (APARTMENT), display "apartment".
Else if HOTYPE flag = 3 (ROOM), display "room".
Else if HOTYPE flag = 4 (UNIT), display "unit".
Else if HOTYPE flag = 5 (SUITE), display "suite".
Else if HOTYPE flag = 6 (OTHER), display "TEXT ENTERED AT HT10A (OTHER)".
Else display "home".

If FACILITY flag=1 (YES) and FACILITY NAME is available, display "FACILITY NAME (text from HT9)".
Else if FACILITY flag=1 (YES) and FACILITY NAME is null, display “SP’s {ADDRESS1, ADDRESS 2} from PERSON ROSTER”.

If FACILITY flag=1 (YES), display “{apartment/unit/suite/room/other} at {FACILITY NAME/SP’s {ADDRESS1, ADDRESS 2} from PERSON ROSTER}” and “or pay a monthly amount to live there”.
Otherwise, display “home (apartment/condo) at {SP’s {ADDRESS1, ADDRESS 2} from PERSON ROSTER}”.

QUESTION TEXT:

{Do you/Does SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME}} own
the {home (apartment/condo) at {SP’s {ADDRESS1, ADDRESS 2} from PERSON ROSTER}}/
{apartment/unit/suite/room/other} at {FACILITY NAME/SP’s {ADDRESS1, ADDRESS 2} from PERSON ROSTER}}, rent it {or pay a monthly amount to live there}, or is there some other arrangement?

CODES

<table>
<thead>
<tr>
<th></th>
<th>OWN</th>
<th></th>
</tr>
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<tbody>
<tr>
<td>1</td>
<td>RENT</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>SOME OTHER ARRANGEMENT</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>REFUSED</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>DON’T KNOW</td>
<td></td>
</tr>
</tbody>
</table>

HP2

hp9mrtpadoff

R9 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.

<table>
<thead>
<tr>
<th>CODES</th>
<th>意义</th>
<th>hp9</th>
<th>hp9mthlymort</th>
<th>R9</th>
<th>HP3</th>
<th>MORTGAGE PAYMENT AMOUNT EACH MONTH</th>
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<tbody>
<tr>
<td>1</td>
<td>PAID OFF</td>
<td></td>
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<td>HP4</td>
<td></td>
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<tr>
<td>2</td>
<td>STILL MAKE PAYMENTS</td>
<td></td>
<td></td>
<td></td>
<td>HP4</td>
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<tr>
<td>3</td>
<td>REVERSE MORTGAGE</td>
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<td>REFUSED</td>
<td></td>
<td></td>
<td></td>
<td>HP4</td>
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</tr>
<tr>
<td></td>
<td>DON’T KNOW</td>
<td></td>
<td></td>
<td></td>
<td>HP4</td>
<td></td>
</tr>
</tbody>
</table>

**HP3 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.

**HP3A QUESTION TEXT:**
- SHOW CARD HP1
- Is [it....

**CODES**
- 1: less than $250,
- 2: $250 TO LESS THAN $500
- 3: $500 TO LESS THAN $1,000
- 4: $1,000 TO LESS THAN $3,000
- 5: $3,000 TO LESS THAN $5,000
- 6: $5,000 OR MORE
- REFUSED
- DON’T KNOW

**HP3B QUESTION TEXT:**
- R9 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**

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<th>Description</th>
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<tr>
<td>2</td>
<td>10 YEARS</td>
</tr>
<tr>
<td>3</td>
<td>LONGER THAN 10 YEARS</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
</tr>
<tr>
<td></td>
<td>DON’T KNOW</td>
</tr>
</tbody>
</table>

**HP3C**

**hp9amtstlowe**

R9 HP3C HOW MUCH STILL OWE

**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)?

**ENTER DOLLAR AMOUNT**

**[HP4]**

**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>1 to 999999</td>
<td>500 to 900000</td>
<td>HP4</td>
<td></td>
</tr>
</tbody>
</table>

**PROGRAMMER INSTRUCTIONS:**

Hard Range: 1-99999999
Soft Range: 500-900000

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

**HP3D**

**hp9amoutowed**

R9 HP3D THE AMOUNT OWED IS

**QUESTION TEXT:**

SHOW CARD HP2
Is the amount owed…

CODES
1 less than $50,000,
2 $50,000 to less than $100,000, or
3 over $100,000?
REFUSED
DON’T KNOW

HP4 hp9homevalue R9 HP4 PRESENT VALUE OF HOME

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 IA]

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.

HP4A hp9homvalamt R9 HP4A HOME VALUE AMOUNT

QUESTION TEXT:
SHOW CARD HP3

Would it be…

CODES
1 less than $50,000, SECTION IA
2 $50,000-$74,999, SECTION IA
3 $75,000-$99,999, SECTION IA
4 $100,000-$199,999, SECTION IA
5 $200,000-$299,999, SECTION IA
6 $300,000-$499,999, SECTION IA
7 $500,000-$749,999, or SECTION IA
8 $750,000 or more? SECTION IA
REFUSED SECTION IA
DON’T KNOW SECTION IA
**HP5**

**hp9payrent**

R9 HP5 DO YOU PAY RENT

**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 STAU 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**

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
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<tbody>
<tr>
<td>1</td>
<td>YES</td>
</tr>
<tr>
<td>2</td>
<td>NO</td>
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<td>REFUSED</td>
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**SECTION IA**

**HP6**

**hp9rentamt**

R9 HP6 RENT PAID EACH MONTH

**QUESTION TEXT:**

How much is that each month?

ENTER DOLLAR AMOUNT [BOX HP7]

**ENTER NUMBER**

Range 0 to 9999
Soft Range 1 to 3000
REFUSED
DON’T KNOW

**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**

**hp9rentamout**

R9 HP6A RENT AMOUNT

**QUESTION TEXT:**

SHOW CARD HP1

Is it....

**CODES**

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
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<tbody>
<tr>
<td>1</td>
<td>LESS THAN $250</td>
</tr>
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<td>2</td>
<td>$250 TO LESS THAN $500</td>
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<td>3</td>
<td>$500 TO LESS THAN $1,000</td>
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<tr>
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<tr>
<td>5</td>
<td>$3,000 TO LESS THAN $5,000</td>
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<tr>
<td>6</td>
<td>$5,000 OR MORE</td>
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<td>REFUSED</td>
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<tr>
<td>BOX HP7</td>
<td>BOX HP7</td>
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If HP6>=4750 or HP6a= 4 ($1,000 TO LESS THAN $3,000), 5 ($3,000 TO LESS THAN $5,000), or 6 ($5,000 OR MORE), go to Section IA – Income and Assets.
Otherwise, go to HP7.

**HP7**

**hp9sec8pubsn**

R9 HP7 HME SEC 8 PUBL SENOR HOUS

**QUESTION TEXT:**

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

**CODES**

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>YES</td>
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<tr>
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<tr>
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**PROGRAMMER INSTRUCTIONS:**

Go to Section IA – Income and Assets.