NHATS Round 5

Section HP [HOME OWNERSHIP] Sequence: 37

HP1 hp5ownrentot R5 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 HT9b}". Else if FACILITY flag=1 (YES) and FACILITY NAME is null, display “SP’s {ADDRESS1, ADDRESS2} from PERSON ROSTER".

If FACILITY flag=1 (YES), display “{apartment/unit/suite/room/other} at {FACILITY NAME/SP’S[ADDRESS1, ADDRESS2] from PERSON ROSTER}” and “(or pay a monthly amount to live there)”. Otherwise, display “{own the home (apartment/condo) at [SP’s {ADDRESS1, ADDRESS2} from PERSON ROSTER}] or rent it {or pay a monthly amount to live there}, or is there some other arrangement?"

QUESTION TEXT:
{Do you/Does SP} {or {SP FIRSTNAME LASTNAME/SPouse/PARTNER FIRSTNAME LASTNAME}} {own the home (apartment/condo) at [SP’s {ADDRESS1, ADDRESS2} from PERSON ROSTER}] if {apartment/unit/suite/room/other} at {FACILITY NAME/SP’S[ADDRESS1, ADDRESS2] from PERSON ROSTER}, rent it {or pay a monthly amount to live there}, or is there some other arrangement?

CODES
1 OWN HP6
2 RENT (OR PAY MONTHLY AMOUNT) HP5
3 SOME OTHER ARRANGEMENT HP5
4 REFUSED
5 DON’T KNOW

HP2 hp5mrtpadoff R5 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}". 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
Is the 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**

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
<th>HP4</th>
</tr>
</thead>
<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 REFUSED</td>
<td>HP4</td>
</tr>
<tr>
<td></td>
<td>DON’T KNOW</td>
<td>HP4</td>
</tr>
</tbody>
</table>

**HP3**

`hp5mthlymort` R5 HP3 MORTGAGE PAYMENT EACH MTH

**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
- 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**

`hp5mortpayt` R5 HP3A MORTGAGE PAYMENT AMOUNT

**QUESTION TEXT:**

SHOW CARD HP1

Please look at this card and tell me which is closest.

**CODES**

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>LESS THAN $250,</td>
</tr>
<tr>
<td>2</td>
<td>$250 TO LESS THAN $500,</td>
</tr>
<tr>
<td>3</td>
<td>$500 TO LESS THAN $1,000</td>
</tr>
<tr>
<td>4</td>
<td>$1,000 TO LESS THAN $3,000</td>
</tr>
<tr>
<td>5</td>
<td>$3,000 TO LESS THAN $5,000</td>
</tr>
<tr>
<td>6</td>
<td>$5,000 OR MORE?</td>
</tr>
<tr>
<td></td>
<td>REFUSED</td>
</tr>
<tr>
<td></td>
<td>DON’T KNOW</td>
</tr>
</tbody>
</table>

**HP3B**

`hp5whnpayoff` R5 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
    DON’T KNOW

HP3C hp5amtstlowe
R5 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)?

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]

ENTER NUMBER
Range  1 to 999999
Soft Range  500 to 900000
REFUSED
DON’T KNOW

PROGRAMMER INSTRUCTIONS:
Hard Range: 1-9999999
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 hp5amoutowed
R5 HP3D THE AMOUNT OWED IS

QUESTION TEXT:
Is the amount owed...
CODES

1  less than $50,000,
2  $50,000 to less than $100,000, or
3  $100,000 or more?
   REFUSED
   DON'T KNOW

HP

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]

HP4A

QUESTION TEXT:
SHOW CARD HP2
Please look at this card and tell me which is closest.

CODES

LESS THAN $50,000  SECTION IA

2  $50,000 TO LESS THAN $75,000  SECTION IA
3  $75,000 TO LESS THAN $100,000  SECTION IA
4  $100,000 TO LESS THAN $200,000  SECTION IA
5  $200,000 TO LESS THAN $300,000  SECTION IA
6  $300,000 TO LESS THAN $500,000  SECTION IA
7  $500,000 TO LESS THAN $750,000  SECTION IA
8  $750,000 OR MORE  SECTION IA
   REFUSED  SECTION IA
   DON'T KNOW  SECTION IA
PROGRAMMER INSTRUCTIONS:

ENTER NUMBER

CODES

1 YES
2 NO

SECTION IA

SECTION IA

SECTION IA

QUESTION TEXT:

{Do you/Does SP} {or {SP FIRSTNAME LASTNAME/SPOUSE/PARTNER FIRSTNAME LASTNAME} pay to live here?}

HP5

hp5payrent

R5 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 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”.

HP6

hp5rentamt

R5 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

hp5rentamout

R5 HP6A RENT AMOUNT

QUESTION TEXT:

SHOW CARD HP1

Please look at this card and tell me which is closest.

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
If HP6 >= $750 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.

**QUESTION TEXT:**
Is this home in Section 8 public housing or housing for low-income seniors?

**CODES**
1. YES
2. NO
   REFUSED
   DON’T KNOW

**PROGRAMMER INSTRUCTIONS:**
Go to Section IA– Income and Assets.