OR OFFICE USE ONLY UNLABELLED CROSS-SI	ONSUMER FINANCES Project (46626 ECTION COVERSHEET Fall 1989
. This coversheet generated by:	
. Green "Panel/X-Section Coversheet	Interviewer's Label
An HU structure added to Listing Sheet and selected for this study	Interviewer S Labet
. An Added HU found at a listed and selected Line	
ample ID is:	
. Sample AddressUnique Address or Description:	
Sample Location:	
3. Your IW No	7. Total Calls (Call # of Final Call)
4. Length of Iw(Minutes)	8. Date of Final Result
5. Length of Edit(Minutes)	9. Final Result Code
6. Pers. Ltr Req.? 5. NO 1. YES>(Date)	9a. Mode of Iw: 1. F-t-F 2. TEL
REMEMBER TO COMPLETE OBSERVAT	ION SECTION AND THUMBNAIL SKETCH
ER: COMPLETE ITEM 10 BELOW IF BOX B IS MARKED AT ITEM O	
. THE ADDRESS OR DESCRIPTION ON THE SAMPLE LABEL ABOVE WA	S FOUND TO HAVE: (CHECK ONE)
	> Do not attempt any interviews. Obtain HU locations within the structure and call your supervisor.
location of HU 1 in the structure:	dress on the label the following description about the
The unique and complete address or description for description and location of HU in the structure:	or each of the additional HU's is (use street address/
HU 2:	
HU 3:	
HU 4:	
	itianal IIIIa. Attempt on interview at III 1 and at each of the
	n a sample ID for each of the additional HU's. Record the Box O of the unlabelled coversheet for each added HU(s).
additional HU's. Call your supervisor later to obtain ID's on the respective lines above. Enter the ID in B Be sure to add these ID's to your SAS. Hello, my name is, and I work for The United identification (SHOW ID). The University of Michig	n a sample ID for each of the additional HU's. Record the Box O of the unlabelled coversheet for each added HU(s). versity of Michigan's Survey Research Center. Here is my an is conducting a study throughout the country and we are is in the United States. This address was selected as part of
additional HU's. Call your supervisor later to obtain ID's on the respective lines above. Enter the ID in B Be sure to add these ID's to your SAS. Hello, my name is, and I work for The Unitidentification (SHOW ID). The University of Michig interested in the financial situations of household	n a sample ID for each of the additional HU's. Record the Box O of the unlabelled coversheet for each added HU(s). versity of Michigan's Survey Research Center. Here is my lan is conducting a study throughout the country and we are is in the United States. This address was selected as part of
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additional HU's. Call your supervisor later to obtain ID's on the respective lines above. Enter the ID in B Be sure to add these ID's to your SAS. Hello, my name is, and I work for The United identification (SHOW ID). The University of Michig interested in the financial situations of household study's sample, and I may need to interview someone CALL RECORD CALL RECORD DAY OF TIME IWER CONTACT WITH APPT. MADE APPT.	n a sample ID for each of the additional HU's. Record the Box O of the unlabelled coversheet for each added HU(s). versity of Michigan's Survey Research Center. Here is my an is conducting a study throughout the country and we are is in the United States. This address was selected as part of here. TURN TO P. 8, ITEM 13, HOUSEHOLD LISTING.

zī. in	TERVIEWER CHECKPOINT: RESPONDENT: EMPLOYER/PENSION/SOCIAL SECURITY NUMBER
	1. R IS COVERED BY A PENSION FROM CURRENT JOB (BOX 1 CHECKED AT Y42) 2. ALL OTHERS, (BOX 2 CHECKED AT Y42)>GO TO Z3BOTTOM OF THIS PAGE
Z2.	I need to get just a few more pieces of information before I leave. In order to obtain the latest available information about the retirement benefits that peopl with work experience like yours are entitled to, we would like to contact the employer who will be providing your <u>primary</u> pension. For this purpose, we need know the name and address of the employer, or other organization, that provides <u>primary</u> pension you expect to receive.
Z2a.	EMPLOYER NAME:
	ADDRESS:
Z2b.	PENSION PROVIDER (IF DIFFERENT):
	ADDRESS: / CITY, STATE AND ZIP CODE
Z2c.	REFUSED (EXPLAIN):
Z2d.	What is the official title of the job from which you expect to receive your primpension? OFFICIAL JOB TITE
Z2e.	In order to get complete information on the adequacy of pension and retirement income and to examine health care benefit information of households in our sampl we would like to know your Social Security Number(what is your Social Securit Number?)
	SOCIAL SECURITY NUMBER
Z2f.	REFUSED (EXPLAIN):
	NEXT PAGE, Z4
Z3.	The Survey Research Center would like to obtain the latest available information about the retirement and health benefits that you and others like you can expect receive. For this reason, we would like to know your Social Security Number (what is your Social Security Number)?
	SOCIAL SECURITY NUMBER
Z3a.	REFUSED (EXPLAIN):

Z4.	INTERVIEWER CHECKPOINT: SPOUSE: EMPLOYER/PENSION/SS#
	3. R IS NOT MARRIED (BOX 3 CHECKED AT Y43)>NEXT PAGE, R1
	4. S IS COVERED BY A PENSION FROM CURRENT JOB (BOX 4 CHECKED AT Y43)
	5. ALL OTHERS (BOX 5 CHECKED AT Y43)>GO TO Z6BOTTOM OF THIS PAGE
25.	We would also like to obtain information about the retirement benefits that people with work experience like your (husband/wife) are entitled to receive. (In order to do this, we would like to contact the employer who will be providing (his/her) primary pension.) For this purpose, we would like to know the name and address of the employer, or other organization, that provides the primary pension that (he/she) expects to receive.
25a.	EMPLOYER NAME:
	ADDRESS:/
Ζ5Ъ.	PENSION PROVIDER (IF DIFFERENT):
	ADDRESS:/
Z5c. Z5d.	REFUSED (EXPLAIN): What is the official title of the job from which (he/she) expects to receive (his/her) primary pension?
٠	OFFICIAL JOB TITLE
Z5e.	In addition, to get complete information about your (husband's/wife's) retirement and health benefits, we would like to know (his/her) Social Security Number(what is [his/her] Social Security Number?)
	SOCIAL SECURITY NUMBER
Z5 f .	REFUSED (EXPLAIN):
	NEXT PAGE, R1
Z6.	(The Survey Research Center would like to obtain the latest available information about the retirement and health benefits that your [husband/wife] and others like [him/her] can expect to receive.) (For this reason,) we would like to know your (husband's/wife's) Social Security Number (what is [his/her] Social Security Number)?
	SOCIAL SECURITY NUMBER
26a.	REFUSED (EXPLAIN):

FIRST

RECONTACT INFORMATION

R1.	Thank you very much for this interview. We value people like you who are willing to contribute their experiences to our research. We will be sending you a report of some of our findings as a way of expressing our appreciation for your cooperation. Our Regional Supervisor may also be calling or writing you to verify this interview. For these reasons I would like to ask for your name, address and telephone number. (FOR WOMEN OBTAIN THEIR FIRST NAME, NOT THEIR HUSBAND'S FIRST NAME.)
Rla.	What is your <u>full legal</u> name as it appears on official documents such as your voter's registration, Social Security Card, or driver's license? (IWER: VERIFY SPELLING OF R'S FULL NAME AND WRITE CLEARLY.)
	TITLE: MR MRS MISS MS DR REV NAME REFUSED
	FIRST NAME MIDDLE LAST NAME INITIAL
Rlb.	What is your address? ADDRESS REFUSED
	STREET ADDRESS
	CITY STATE ZIP CODE
R2.	INTERVIEWER CHECKPOINT: ADDRESS AT R1b ABOVE IS:
	1. IDENTICAL TO SAMPLE 2. CORRECTED VERSION OF LABEL ADDRESS 3. DIFERENT FROM SAMPLE LABEL ADDRESS LABEL
	GO TO R4
R3.	Is this a mailing address for your home, an address you will be moving to, a relative's address, the address of a friend, a business address, or what?
	1. MAILING ADDRESS TO WHICH R IS MOVING 2. ADDRESS TO WHICH R IS MOVING 3. RELATIVE 4. FRIEND 5. BUSINESS 7. OTHER:
R4.	And, what is your telephone number?
	AREA CODE TELEPHONE NUMBER R HAS NO PHONE PHONE NUMBER REFUSED PHONE NUMBER REFUSED
	NEXT PAGE, R6
R4a.	(IF R MARRIED): What is your (husband's/wife's) full legal name?

MIDDLE INITIAL

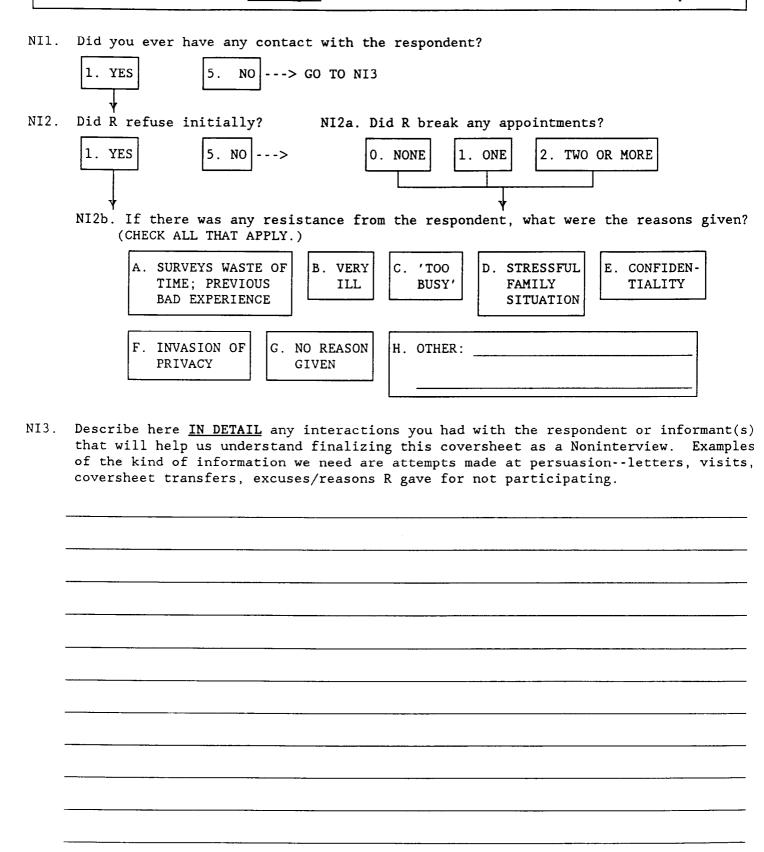
LAST

R5a	1. YES	ohone listed i	n your name?	TO R6	is the phone 1	
Do :	1. YES		n your name?	? ose name		isted? (What
Do :	1. YES		n your name?	? ose name		isted? (What
Do :	1. YES		R5b. In who	ose name		isted? (What
		5. NO>				isted? (What
			1		is person to y	
	,		NAME		R	ELATIONSHIP
	1		·	···-	4	
tim	you have and es of the ye		residence o	or somewh	ere else you l	ive during differe
1.	YES> R		sh to contac address and			sidence. May I
5.	NO					ADDRESS REFUSED
<u> </u>		STREET A	DDRESS			
		CITY			STATE	ZIP
		(AREA COD	E) NUMBE	ER	R HAS NO PHON	PHONE REFUSED
nam	e, address,	and telephone	number of a	a close f		uld you give me th ive who will know ship to you?)
NAME	:				RELATIONSH	IP TO R:
ADDR!						
						
		Y RECONTACT IN WAS REFUSED?	NFORMATION:	WHAT IS	YOUR UNDERSTAI	NDING OF THE REASC
				······································		

NONINTERVIEW FORM

This form <u>MUST</u> be completed for each coversheet finalized as a Noninterview.

Coversheets finalized as Nonsample do not need to have a Noninterview Form completed.



		AM/PM	ID	R/INF/NO ONE			PROVIDE A COMPLETE DESCRIPTION OF CONTACT <u>OR</u> ATTEMPT TO CONTACT ON THE LINES BELOW. GIVE COMPLETE DETAILS
	_	<u>ii</u>			<u></u>	<u>. </u>	
b)	(c)	(d)	(e)	(f)	(g)	(h)	(j)
ATE			I WER			YES/NO/INAP	PROVIDE A COMPLETE DESCRIPTION OF CONTACT OR ATTEMPT TO CONTACT ON THE LINES BELOW. GIVE COMPLETE DETAILS
		_					
b)	(c) Day of	(d)	(e) IWER	(f)	(g)	(h) APPT. KEPT	(j) PROVIDE A COMPLETE DESCRIPTION OF CONTACT <u>OR</u> ATTEMPT
			ID				TO CONTACT ON THE LINES BELOW. GIVE COMPLETE DETAILS
<u>.</u> ,		(4)	(2)	(4)	()	(1)	
İ	DAY OF	TIME	IWER	CONTACT WITH	APPT. MADE	APPT. KEPT	(j) PROVIDE A COMPLETE DESCRIPTION OF CONTACT <u>OR</u> ATTEMPT TO CONTACT ON THE LINES BELOW. GIVE COMPLETE DETAILS
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			(e) IWER ID				(j) PROVIDE A COMPLETE DESCRIPTION OF CONTACT OR ATTEMPT TO CONTACT ON THE LINES BELOW. GIVE COMPLETE DETAILS
i							
			(e) IWER ID				(j) PROVIDE A COMPLETE DESCRIPTION OF CONTACT <u>OR</u> ATTEMPT TO CONTACT ON THE LINES BELOW. GIVE COMPLETE DETAILS
	b) ATE	b) (c) DAY OF ATE WEEK D) (c) DAY OF ATE WEEK D) (c) DAY OF ATE WEEK	b) (c) (d) DAY OF TIME ATE WEEK AM/PM b) (c) (d) DAY OF TIME ATE WEEK AM/PM c) (c) (d) DAY OF TIME ATE WEEK AM/PM	DAY OF TIME IWER AM/PM ID b) (c) (d) (e) IWER IWER AM/PM ID b) (c) (d) (e) IWER ID c) DAY OF TIME IWER ID c) (c) (d) (e) IWER ID c) DAY OF TIME IWER ID c) (c) (d) (e) IWER ID c) (c) (d) (e) IWER ID c) (c) (d) (e) IWER ID	DAY OF TIME IWER CONTACT WITH R/INF/NO ONE DAY OF TIME IWER CONTACT WITH ATE WEEK AM/PM ID R/INF/NO ONE DAY OF TIME IWER CONTACT WITH ATE WEEK AM/PM ID R/INF/NO ONE DAY OF TIME IWER CONTACT WITH ATE WEEK AM/PM ID R/INF/NO ONE DAY OF TIME IWER CONTACT WITH ATE WEEK AM/PM ID R/INF/NO ONE DAY OF TIME IWER CONTACT WITH ATE WEEK AM/PM ID R/INF/NO ONE	DAY OF TIME ID RINF/NO ONE YES / NO DAY OF TIME ID RINF/NO ONE YES / NO DAY OF TIME ID RINF/NO ONE YES / NO DAY OF TIME ID RINF/NO ONE YES / NO DAY OF TIME ID RINF/NO ONE YES / NO DAY OF TIME ID RINF/NO ONE YES / NO DAY OF TIME ID RINF/NO ONE YES / NO DAY OF TIME ID RINF/NO ONE YES / NO DAY OF TIME ID RINF/NO ONE YES / NO DAY OF TIME ID RINF/NO ONE YES / NO DAY OF TIME ID RINF/NO ONE YES / NO DAY OF TIME ID RINF/NO ONE YES / NO DAY OF TIME ID RINF/NO ONE YES / NO DAY OF TIME ID RINF/NO ONE YES / NO DAY OF TIME ID RINF/NO ONE YES / NO DAY OF TIME ID RINF/NO ONE YES / NO DAY OF TIME ID RINF/NO ONE YES / NO DAY OF TIME ID RINF/NO ONE YES / NO DAY OF TIME ID RINF/NO ONE YES / NO DAY OF TIME ID RINF/NO ONE YES / NO	DAY OF TIME IWER CONTACT WITH APPT. MADE APPT. KEPT YES/NO/IMAP DO (C) (d) (e) (f) (g) (h) DAY OF TIME IWER CONTACT WITH APPT. MADE APPT. KEPT ATE WEEK AM/PM ID R/INF/NO ONE YES / NO YES/NO/IMAP DO (C) (d) (e) (f) (g) (h) DAY OF TIME IWER CONTACT WITH APPT. MADE APPT. KEPT ATE WEEK AM/PM ID R/INF/NO ONE YES / NO YES/NO/IMAP DO (C) (d) (e) (f) (g) (h) ATE WEEK AM/PM ID R/INF/NO ONE YES / NO YES/NO/IMAP DO (C) (d) (e) (f) (g) (h) ATE WEEK AM/PM ID R/INF/NO ONE YES / NO YES/NO/IMAP DO (C) (d) (e) (f) (g) (h) ATE WEEK AM/PM ID R/INF/NO ONE YES / NO YES/NO/IMAP

13. In order to determine whom to interview, I need to know who lives here at this address--not their names, just their ages and their relationship to you. Let's start with you--how old are you? (CONTINUE LISTING ALL MEMBERS OF THIS HOUSEHOLD BY RELATIONSHIP TO INFORMANT.)

	(a)	(b)	(c)	(d) Enter "R"
	Household Members by Relationship to Informant	Sex	Age	to Identify Respondent
1.	INFORMANT			
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
o.				

WHOM TO INTERVIEW -- INTERVIEWER INSTRUCTIONS

- a. If household contains only a married couple or persons living as though married, with or without children, interview the person who is most knowledgeable about the family's assets and debts.
- b. If household contains only an adult and their minor children, interview the adult.
- c. If household contains unrelated roommates who are 18 years of age or older, list the household and interview <u>person closest to age 45</u> as a single person economic unit.
- d. If household contains an extended family (persons related by blood, marriage or adoption--e.g., adult married children living with parents), interview the person or persons most knowledgeable about the family's assets and debts. (FAMILY TO BE INTERVIEWED IS DETERMINED BY WHOSE NAME IS ON THE LEASE OR MORTGAGE. INTERVIEW THE MOST KNOWLEDGEABLE PERSON IN THAT FAMILY.)
- e. If unclear whom to interview (especially in case d.) -- CALL THE F.O.
- f. NOTE: In <u>ALL</u> situations, the person whose occupation is asked about in Section R is considered the <u>Respondent</u>. Indicate R for this cover sheet in Col. (d) above.
- 14. We would like to conduct the interview with the person or persons in your family who are most knowledgeable about the family's assets and debts. Who would that be?
- 15. IF MOST KNOWLEDGEABLE PERSON IS NOT AT HOME, DETERMINE CONVENIENT TIME FOR IW (AND PHONE NUMBER IF APPROPRIATE). RECORD THIS INFORMATION IN THE CALL RECORD, ITEM 12.