

Section 4 - TOPICAL MODULES

Part A - SELECTED FINANCIAL ASSETS

STATEMENT A → These next questions concern various assets.

ASK OR VERIFY -
1a. Did . . . own any U.S. Savings Bonds as of (Read last day of reference period)?
 (Type E or EE bonds only.)

- 8204 Yes
 No - SKIP to Check Item T1

b. What was the FACE VALUE of the U.S. Savings Bonds that . . . owned?
 (If ownership was shared, count only . . .'s share.)

- 8206 \$. 00
 x1 DK
 x2 Ref.

CHECK ITEM T1 Interview status of . . .'s spouse.

- 8208 No spouse in household - SKIP to 2c
 Interview for spouse not yet conducted
 Interview for spouse already conducted - SKIP to 2c

2a. As of (Read last day of reference period), **did . . . own jointly with . . .'s (husband/wife) any checking accounts which did NOT earn interest?**

- 8209 Yes
 No
 x1 DK
 x2 Ref. } SKIP to 2c

b. What is your best estimate of the amount of money . . . and . . .'s (husband/wife) had in those checking accounts as of (Read last day of reference period)?

- 8210 \$. 00
 x3 None
 x1 DK
 x2 Ref.

c. (Besides any checking accounts owned jointly with . . .'s spouse,) as of (Read last day of reference period), **did . . . own any (other) checking accounts which did NOT earn interest?**

- 8232 Yes
 No
 x1 DK
 x2 Ref. } SKIP to Check Item T2

d. What is your best estimate of the amount of money . . . had in those checking accounts as of (Read last day of reference period)?
 (If account was shared, count only . . .'s share.)

- 8233 \$. 00
 x3 None
 x1 DK
 x2 Ref.

CHECK ITEM T2 Refer to cc item 24.
 Is . . . 21 years of age or older?

- 8258 Yes
 No - SKIP to Statement B, page 58

3a. Does . . . have any Individual Retirement Accounts - any IRAs - in . . .'s OWN name?
 (If . . . is only included in spouse's IRA account, mark the "No" box.)

- 8260 Yes
 No
 x1 DK
 x2 Ref. } SKIP to 4a

b. For how many years has . . . contributed to . . .'s IRA accounts?

- 8262 Years
 x1 DK
 x2 Ref. - SKIP to 4a

c. As of (Read last day of reference period), **what is the total balance or market value (including interest earned) of . . .'s IRA accounts?** ★

- 8264 \$. 00 - SKIP to 4a
 x1 DK
 x2 Ref. - SKIP to 4a

d. If I were to call back later, would you be able to provide me with an estimate of the amount? (This information is especially important for the purposes of this survey.)

- 8266 Yes - Mark Callback Summary and Reminder Card, Item 16
 No

NOTES

TOPICAL MODULES

Section 4 – TOPICAL MODULES (Continued)

Part B – MEDICAL EXPENSES AND WORK DISABILITY

STATEMENT B → These next questions concern payments that . . . may have made last month for medical bills for himself/herself or his/her family.

1. During (Read last month), did . . . pay any of the following:

a. Doctor bills? 8400 1 Yes 2 No x1 DK

b. Dentist bills? 8402 1 Yes 2 No x1 DK

c. Hospital bills? 8404 1 Yes 2 No x1 DK

d. Expenses for prescription medicine? 8406 1 Yes 2 No x1 DK

CHECK ITEM T3 Is one or more "Yes" boxes marked in item 1? 8408 1 Yes
2 No – SKIP to Check Item T4

2. Not counting amounts already reported by another family member or amounts that will be reimbursed by insurance, how much did . . . pay for medical expenses in the month of (Read last month)?

8410 \$. 00
x1 DK
x2 Ref.

CHECK ITEM T4 Refer to cc item 24. What is . . . 's age? 8412 1 15 years old – SKIP to Check Item T8
2 16 to 67 years old
3 68 years old or older – SKIP to Check Item T8

CHECK ITEM T5 Refer to item 18a on page 7. What is marked in item 18a? 8413 1 Item 18a is blank
2 "Yes" in item 18a – SKIP to 3a
3 "No" in item 18a – Skip to Check Item T8

STATEMENT C → Now I want to ask about any health or physical condition . . . may have that affected . . . 's ability to work.

CHECK ITEM T6 Refer to cc item 47. Is "Disabled" (code 171) marked on the control card for . . . ? 8416 1 Yes
2 No – SKIP to 3b

3a. We have recorded that . . . 's health or condition limits the kind or amount of work . . . can do. Is that correct? 8418 1 Yes – SKIP to Check Item T7
2 No – SKIP to Check Item T8

b. Does . . . have a physical, mental, or other health condition which limits the kind or amount of work . . . can do? 8420 1 Yes – Mark "171" on ISS
2 No – SKIP to Check Item T8

CHECK ITEM T7 Is "Worked" (code 170) marked on the ISS? 8422 1 Yes – SKIP to Check Item T8
2 No

4a. Does . . . 's health or condition prevent . . . from working at a job or business? 8424 1 Yes
2 No – SKIP to Check Item T8

b. Has . . . been prevented from working for the past 12 months or longer? 8426 1 Yes – SKIP to Check Item T8
2 No

c. Is it likely that . . . will be able to work at some time in the next 12 months? 8428 1 Yes
2 No
x1 DK

Go to Check Item T8

NOTES

Section 4 - TOPICAL MODULES (Continued)

Part C - REAL ESTATE, SHELTER COSTS, DEPENDENT CARE, AND VEHICLES

CHECK ITEM T8	Is this the reference person's questionnaire?	8526	<input type="checkbox"/> 1 Yes <input type="checkbox"/> 2 No - <i>SKIP to Check Item P1, page 62</i>
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STATEMENT D → **These next questions concern housing cost and automobile ownership.**

CHECK ITEM T9	Refer to cc item 15. Tenure	8530	<input type="checkbox"/> 1 Owned or being bought <input type="checkbox"/> 2 Rented for cash - <i>SKIP to 2</i> <input type="checkbox"/> 3 Occupied without cash payment - <i>SKIP to 3</i>
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ASK OR VERIFY -

1. Which persons in this household are the owners of this home?

8532	Person No.	[][][]	Name	
8534	Person No.	[][][]	Name	
8536	Person No.	[][][]	Name	

2.	How much was this household's (rent/mortgage payment) last month? <i>(Include any condominium or association fees.)</i>	8538	\$ [] [] [] . [] [] <input type="checkbox"/> x3 None <input type="checkbox"/> x1 DK } <i>SKIP to Check Item T11</i> <input type="checkbox"/> x2 Ref.
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3.	How much did this household pay for electricity, gas, and other utilities last month? <i>(Other utilities include other fuels, water, and basic telephone service. Include only payments made in addition to those reported in item 2.)</i>	8540	\$ [] [] [] . [] [] <input type="checkbox"/> x3 Nothing or included in rent <input type="checkbox"/> x1 DK } <i>SKIP to Check Item T11</i> <input type="checkbox"/> x2 Ref.
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CHECK ITEM T10	Refer to cc items 19b, 23, and 24. Composition of household	8542	<input type="checkbox"/> 1 One person household <input type="checkbox"/> 2 Married-couple household, no other person 18 or older <input type="checkbox"/> 3 Single parent household, no other person 18 or older <input type="checkbox"/> 4 Other composition } <i>SKIP to Check Item T11</i>
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4.	Did more than one of the persons living here pay for the (rent/mortgage payment) and utilities last month?	8544	<input type="checkbox"/> 1 Yes - <i>SKIP to 6</i> <input type="checkbox"/> 2 No
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5.	Which person paid?	8546	Person No. [][][] Name _____ } <i>SKIP to Check Item T11</i>
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6.	Which persons paid and how much did each pay?		
	Person 1	Person 2	Person 3
	Person No. [][][]	Person No. [][][]	Person No. [][][]
	Name _____	Name _____	Name _____
	8554 \$ [] [] [] . [] []	8556 \$ [] [] [] . [] []	8558 \$ [] [] [] . [] []
	<input type="checkbox"/> x1 DK <input type="checkbox"/> x2 Ref.	<input type="checkbox"/> x1 DK <input type="checkbox"/> x2 Ref.	<input type="checkbox"/> x1 DK <input type="checkbox"/> x2 Ref.

CHECK ITEM T11	Refer to cc items 18, and 23. Number of persons in household	8560	<input type="checkbox"/> 1 One - <i>SKIP to Check Item T12</i> <input type="checkbox"/> 2 Two or more
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Section 4 - TOPICAL MODULES (Continued)

Part C - REAL ESTATE, SHELTER COSTS, DEPENDENT CARE, AND VEHICLES (Continued)

<p>7a. Last month, did anyone here pay for the care of a child or a disabled person so that a household member could work, attend training, or look for a job?</p>	<p>8562 1 <input type="checkbox"/> Yes 2 <input type="checkbox"/> No - SKIP to Check Item T12</p>																
<p>b. What was the total cost of these care arrangements for the month of (Read last month)?</p>	<p>8564 \$ <input type="text"/> . <input type="text"/> 00</p> <p>x1 <input type="checkbox"/> DK x2 <input type="checkbox"/> Ref.</p>																
<p>CHECK ITEM T12 Refer to cc items 16a and 16b. Is this residence in a public housing project, is it subsidized, or is it neither public nor subsidized?</p>	<p>8658 1 <input type="checkbox"/> In a public housing project } SKIP to 9a 2 <input type="checkbox"/> Subsidized 3 <input type="checkbox"/> Neither public nor subsidized</p>																
<p>8a. Does . . . or anyone else in this household own any (other) real estate such as a vacation home or undeveloped lot? Exclude rental property previously reported or rental property attached to or located on the same land as . . . 's own residence.</p>	<p>8660 1 <input type="checkbox"/> Yes 2 <input type="checkbox"/> No } SKIP to 9a x1 <input type="checkbox"/> DK</p>																
<p>b. Which persons in this household are the owners of this (these) property(ies)?</p>	<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td style="width:15%;"></td> <td style="width:35%;">Person No.</td> <td style="width:50%;">Name</td> </tr> <tr> <td>8662</td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td>8664</td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </table>		Person No.	Name	8662	<input type="text"/>	<input type="text"/>	8664	<input type="text"/>	<input type="text"/>							
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8662	<input type="text"/>	<input type="text"/>															
8664	<input type="text"/>	<input type="text"/>															
<p>c. What is the total value of (Read persons' names) equity in this (these) property(ies)? (By equity, we mean the amount that could be obtained by selling the property and paying off any debts.)</p> <p><i>Count only share owned by household members.</i></p>	<p>8666 \$ <input type="text"/> . <input type="text"/> 00</p> <p>x1 <input type="checkbox"/> DK x2 <input type="checkbox"/> Ref.</p>																
<p>9a. Does anyone in this household own a car, van, or truck, excluding recreational vehicles (RV's) and motorcycles?</p>	<p>8714 1 <input type="checkbox"/> Yes 2 <input type="checkbox"/> No - SKIP to 10a</p>																
<p>b. How many cars, trucks, or vans are owned by members of this household?</p>	<p>8716 <input type="text"/> Number of motor vehicles</p>																
<p><i>(Ask items 9c-9g for vehicle 1 and then return to 9c for additional vehicles.)</i></p> <p>c. Who is (are) the owner(s) of the (newest, next newest) motor vehicle?</p>	<table border="1" style="width:100%; border-collapse: collapse;"> <thead> <tr> <th style="width:33%;"></th> <th style="width:33%;">Vehicle 1</th> <th style="width:33%;">Vehicle 2</th> <th style="width:33%;">Vehicle 3</th> </tr> </thead> <tbody> <tr> <td style="vertical-align: top;"> <p>Person No.</p> <p>8718 <input type="text"/></p> <p>Name</p> <p><input type="text"/></p> </td> <td style="vertical-align: top;"> <p>Person No.</p> <p>8720 <input type="text"/></p> <p>Name</p> <p><input type="text"/></p> </td> <td style="vertical-align: top;"> <p>Person No.</p> <p>8722 <input type="text"/></p> <p>Name</p> <p><input type="text"/></p> </td> </tr> <tr> <td style="vertical-align: top;"> <p>Person No.</p> <p>8724 <input type="text"/></p> <p>Name</p> <p><input type="text"/></p> </td> <td style="vertical-align: top;"> <p>Person No.</p> <p>8726 <input type="text"/></p> <p>Name</p> <p><input type="text"/></p> </td> <td style="vertical-align: top;"> <p>Person No.</p> <p>8728 <input type="text"/></p> <p>Name</p> <p><input type="text"/></p> </td> </tr> </tbody> </table>		Vehicle 1	Vehicle 2	Vehicle 3	<p>Person No.</p> <p>8718 <input type="text"/></p> <p>Name</p> <p><input type="text"/></p>	<p>Person No.</p> <p>8720 <input type="text"/></p> <p>Name</p> <p><input type="text"/></p>	<p>Person No.</p> <p>8722 <input type="text"/></p> <p>Name</p> <p><input type="text"/></p>	<p>Person No.</p> <p>8724 <input type="text"/></p> <p>Name</p> <p><input type="text"/></p>	<p>Person No.</p> <p>8726 <input type="text"/></p> <p>Name</p> <p><input type="text"/></p>	<p>Person No.</p> <p>8728 <input type="text"/></p> <p>Name</p> <p><input type="text"/></p>						
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<p>d. What is the year, make, and model of this vehicle?</p>	<table border="1" style="width:100%; border-collapse: collapse;"> <thead> <tr> <th style="width:33%;"></th> <th style="width:33%;">Vehicle 1</th> <th style="width:33%;">Vehicle 2</th> <th style="width:33%;">Vehicle 3</th> </tr> </thead> <tbody> <tr> <td style="vertical-align: top;"> <p>8730 <input type="text"/> 1 <input type="text"/> 9 <input type="text"/></p> <p>x1 <input type="checkbox"/> DK</p> </td> <td style="vertical-align: top;"> <p>8732 <input type="text"/> 1 <input type="text"/> 9 <input type="text"/></p> <p>x1 <input type="checkbox"/> DK</p> </td> <td style="vertical-align: top;"> <p>8734 <input type="text"/> 1 <input type="text"/> 9 <input type="text"/></p> <p>x1 <input type="checkbox"/> DK</p> </td> </tr> <tr> <td style="vertical-align: top;"> <p>PGM 8 Make</p> <p>8735 <input type="text"/></p> <p>8736 x1 <input type="checkbox"/> DK</p> </td> <td style="vertical-align: top;"> <p>PGM 8 Make</p> <p>8737 <input type="text"/></p> <p>8738 x1 <input type="checkbox"/> DK</p> </td> <td style="vertical-align: top;"> <p>PGM 8 Make</p> <p>8739 <input type="text"/></p> <p>8740 x1 <input type="checkbox"/> DK</p> </td> </tr> <tr> <td style="vertical-align: top;"> <p>Model</p> <p>8741 <input type="text"/></p> <p>8742 x1 <input type="checkbox"/> DK</p> </td> <td style="vertical-align: top;"> <p>Model</p> <p>8743 <input type="text"/></p> <p>8744 x1 <input type="checkbox"/> DK</p> </td> <td style="vertical-align: top;"> <p>Model</p> <p>8745 <input type="text"/></p> <p>8746 x1 <input type="checkbox"/> DK</p> </td> </tr> <tr> <td style="vertical-align: top;"> <p>OFFICE USE ONLY</p> <p>PGM 7</p> <p>8748 <input type="text"/></p> </td> <td style="vertical-align: top;"> <p>OFFICE USE ONLY</p> <p>PGM 7</p> <p>8750 <input type="text"/></p> </td> <td style="vertical-align: top;"> <p>OFFICE USE ONLY</p> <p>PGM 7</p> <p>8752 <input type="text"/></p> </td> </tr> </tbody> </table>		Vehicle 1	Vehicle 2	Vehicle 3	<p>8730 <input type="text"/> 1 <input type="text"/> 9 <input type="text"/></p> <p>x1 <input type="checkbox"/> DK</p>	<p>8732 <input type="text"/> 1 <input type="text"/> 9 <input type="text"/></p> <p>x1 <input type="checkbox"/> DK</p>	<p>8734 <input type="text"/> 1 <input type="text"/> 9 <input type="text"/></p> <p>x1 <input type="checkbox"/> DK</p>	<p>PGM 8 Make</p> <p>8735 <input type="text"/></p> <p>8736 x1 <input type="checkbox"/> DK</p>	<p>PGM 8 Make</p> <p>8737 <input type="text"/></p> <p>8738 x1 <input type="checkbox"/> DK</p>	<p>PGM 8 Make</p> <p>8739 <input type="text"/></p> <p>8740 x1 <input type="checkbox"/> DK</p>	<p>Model</p> <p>8741 <input type="text"/></p> <p>8742 x1 <input type="checkbox"/> DK</p>	<p>Model</p> <p>8743 <input type="text"/></p> <p>8744 x1 <input type="checkbox"/> DK</p>	<p>Model</p> <p>8745 <input type="text"/></p> <p>8746 x1 <input type="checkbox"/> DK</p>	<p>OFFICE USE ONLY</p> <p>PGM 7</p> <p>8748 <input type="text"/></p>	<p>OFFICE USE ONLY</p> <p>PGM 7</p> <p>8750 <input type="text"/></p>	<p>OFFICE USE ONLY</p> <p>PGM 7</p> <p>8752 <input type="text"/></p>
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Section 4 - TOPICAL MODULES (Continued)

Part C - REAL ESTATE, SHELTER COSTS, DEPENDENT CARE, AND VEHICLES (Continued)

		Vehicle 1		Vehicle 2		Vehicle 3							
9e. Is this vehicle owned free and clear, or is there still money owed on it?	8754	1 <input type="checkbox"/> Money owed	}	SKIP to 9g	8756	1 <input type="checkbox"/> Money owed	}	SKIP to 9g	8758	1 <input type="checkbox"/> Money owed			
		2 <input type="checkbox"/> Free and clear				2 <input type="checkbox"/> Free and clear				2 <input type="checkbox"/> Free and clear			
		x1 <input type="checkbox"/> DK				x1 <input type="checkbox"/> DK				x1 <input type="checkbox"/> DK			
f. How much is currently owed for this vehicle?	8760	\$.00	8761	\$.00	8762	\$.00	
		x1 <input type="checkbox"/> DK - Probe			x1 <input type="checkbox"/> DK - Probe			x1 <input type="checkbox"/> DK - Probe					
		x2 <input type="checkbox"/> Ref.			x2 <input type="checkbox"/> Ref.			x2 <input type="checkbox"/> Ref.					
g. Is this vehicle used primarily for either business purposes or for the transportation of a disabled person?	8763	1 <input type="checkbox"/> Yes		2 <input type="checkbox"/> No	8764	1 <input type="checkbox"/> Yes		2 <input type="checkbox"/> No	8765	1 <input type="checkbox"/> Yes		2 <input type="checkbox"/> No	
	CHECK ITEM T13 Is there another vehicle which has not been asked about?												
	8766	1 <input type="checkbox"/> Yes - Ask 9c for next vehicle		2 <input type="checkbox"/> No - Go to 10a	8768	1 <input type="checkbox"/> Yes - Ask 9c for next vehicle		2 <input type="checkbox"/> No - Go to 10a	Go to 10a				
10a. Does anyone in this household own another kind of vehicle, not used for any business, such as a motorcycle, boat, or recreational vehicle? <i>Mark (X) all that apply.</i>	8770	1 <input type="checkbox"/> Motorcycle											
	8772	2 <input type="checkbox"/> Boat											
	8774	3 <input type="checkbox"/> Recreational vehicle (RV)											
	8776	4 <input type="checkbox"/> Other - Specify _____											
	8778	5 <input type="checkbox"/> No - SKIP to Check Item P1, page 62											
	<i>Ask items 10b-10e for each category of vehicle.</i>												
b. Who is (are) the owner(s) of the (Read first/second category marked in 10a)?	Category 1						Category 2						
	8780	Person No.	Name	8782	Person No.	Name	8784	Person No.	Name	8786	Person No.	Name	
c. If this vehicle were sold, what would it sell for in its present condition?	8788	\$.00	8790	\$.00					
		x1 <input type="checkbox"/> DK - Probe			x1 <input type="checkbox"/> DK - Probe			x2 <input type="checkbox"/> Ref. - SKIP to Check Item T14		x2 <input type="checkbox"/> Ref. - SKIP to Check Item P1, page 62			
		x2 <input type="checkbox"/> Ref. - SKIP to Check Item T14			x2 <input type="checkbox"/> Ref. - SKIP to Check Item P1, page 62								
d. Is (are) this (these) vehicle(s) owned free and clear, or is there still money owed on it (them)?	8792	1 <input type="checkbox"/> Money owed	}	SKIP to Check Item T14	8794	1 <input type="checkbox"/> Money owed	}	SKIP to Check Item P1, page 62	8796	1 <input type="checkbox"/> Money owed			
		2 <input type="checkbox"/> Free and clear				2 <input type="checkbox"/> Free and clear				2 <input type="checkbox"/> Free and clear			
		x1 <input type="checkbox"/> DK				x1 <input type="checkbox"/> DK				x1 <input type="checkbox"/> DK			
e. How much is currently owed for this (these) vehicle(s)?	8796	\$.00	8798	\$.00					
		x1 <input type="checkbox"/> DK - Probe			x1 <input type="checkbox"/> DK - Probe			x2 <input type="checkbox"/> Ref.		x2 <input type="checkbox"/> Ref.			
		x2 <input type="checkbox"/> Ref.			x2 <input type="checkbox"/> Ref.								
CHECK ITEM T14 Is there another vehicle which has not been asked about?	8800	1 <input type="checkbox"/> Yes - Ask 10b for next vehicle						Go to Check Item P1, page 62					
		2 <input type="checkbox"/> No - Go to Check Item P1, page 62											
	NOTES												