

FOR OFFICE USE ONLY

**PANEL SURVEY OF CONSUMER FINANCES
PANEL-ONLY COVERSHEET**

**Project 65 (466293)
Fall 1989**

1. SAMPLE LABEL

2. Interviewer's Label

3. This 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 OBSERVATION SECTION AND THUMBNAIL SKETCH

10. Hello, my name is _____, and I work for the Survey Research Center at the University of Michigan. I'm trying to reach (R), who was kind enough to participate in our study in 1983. Does (he/she) live here?

1. YES 5. NO--> 10a. PRE-EDIT-- R MARRIED IN '83: YES NO-->GO TO ITEM 12

10b. We're also trying to reach the person to whom (R) was married in 1983; does (SPOUSE) live here?

1. YES 5. NO-->GO TO ITEM 12

11. To verify our office records, I need to ask if you are currently living at (READ SAMPLE ADDRESS ON '83 COVERSHEET)?

1. YES, R 2. YES, '83 SPOUSE ONLY 5. NO, NEITHER R NOR S

GO TO ITEM 14

GO TO PINK SPLITOFF
COVERSHEET, CONDUCT PANEL IW

12. INTERVIEWER CHECKPOINT -- SEE SAMPLE LABEL, TRACKING INSTRUCTIONS LOWER RIGHT CORNER

1. TRACK NO ONE----->DO NOT CONDUCT ANY IW AT THIS HU--CODE COVERSHEET '92'.

2. TRACK R (AND '83 SPOUSE)--->RECORD ANY NEW ADDRESS INFORMATION IN ITEM 13 BELOW AND CONDUCT PANEL IW WITH '83 R (AND '83 SPOUSE), OR '83 SPOUSE.

13. NAME: _____

NEW STREET ADDRESS: _____

NEW CITY, STATE, ZIP: _____

NEW AREA CODE AND TELEPHONE NUMBER: _____

14. The University of Michigan is conducting a nationwide Study of Consumer Finances. You were kind enough to participate in 1983 (and 1986) and we would like to speak with you again. (GO TO HHL UPDATE SHEET, ITEM #1.)

15. CALL RECORD ON PAGE 7 OF COVERSHEET

Z4. INTERVIEWER CHECKPOINT: SPOUSE: EMPLOYER/PENSION/SS#

<input type="checkbox"/>	3. R IS NOT MARRIED (BOX 3 CHECKED AT Y43)-->NEXT PAGE, R1
<input type="checkbox"/>	4. S IS COVERED BY A PENSION FROM CURRENT JOB (BOX 4 CHECKED AT Y43)
<input type="checkbox"/>	5. ALL OTHERS (BOX 5 CHECKED AT Y43)-->GO TO Z6--BOTTOM OF THIS PAGE

Z5. 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.

Z5a. EMPLOYER NAME: _____

ADDRESS: _____
NUMBER AND STREET CITY, STATE AND ZIP CODE

Z5b. PENSION PROVIDER (IF DIFFERENT): _____

ADDRESS: _____
NUMBER AND STREET CITY, STATE AND ZIP CODE

Z5c. REFUSED (EXPLAIN): _____

Z5d. What is the official title of the job from which (he/she) expects to receive (his/her) primary pension?

_____ 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

--	--	--	--	--	--	--	--	--	--

Z5f. 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

--	--	--	--	--	--	--	--	--	--

Z6a. REFUSED (EXPLAIN): _____

NEXT PAGE, R1

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.)**

R1a. What is your full legal 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 INITIAL LAST NAME

R1b. What is your address?

ADDRESS REFUSED

STREET ADDRESS

CITY STATE ZIP CODE

R2. INTERVIEWER CHECKPOINT: ADDRESS AT R1b ABOVE IS:

1. IDENTICAL TO SAMPLE LABEL ADDRESS	2. CORRECTED VERSION OF SAMPLE LABEL ADDRESS	3. DIFERENT FROM SAMPLE LABEL
GO TO R4	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	2. ADDRESS TO WHICH R IS MOVING	3. RELATIVE	4. FRIEND	5. BUSINESS	7. OTHER: _____
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R4. And, what is your telephone number?

____-____-____

AREA CODE TELEPHONE NUMBER

R HAS NO PHONE PHONE NUMBER REFUSED

NEXT PAGE, R6

R4a. (IF R MARRIED): What is your (husband's/wife's) legal name?

FIRST MIDDLE INITIAL LAST

R5. Is your phone number listed in the current telephone directory?

1. YES, LISTED

5. NO, NOT LISTED

8. NOT SURE, DON'T KNOW

GO TO R6

R5a. Is your phone listed in your name?

1. YES

5. NO

R5b. In whose name is the phone listed? (What relation is this person to you?)

NAME

RELATIONSHIP

R6. Do you have another place of residence or somewhere else you live during different times of the year?

1. YES

5. NO

R6a. We may wish to contact you at your other residence. May I have the address and phone number?

STREET ADDRESS

ADDRESS REFUSED

CITY

STATE

ZIP

(AREA CODE)

NUMBER

R HAS NO PHONE

PHONE REFUSED

R7. If for any reason we should have difficulty contacting you, could you give me the name, address, and telephone number of a close friend or relative who will know how to get in touch with you? (And what is this person's relationship to you?)

NAME: _____

RELATIONSHIP TO R: _____

ADDRESS: _____

TELEPHONE: _____

R8. IF R REFUSED ANY RECONTACT INFORMATION: WHAT IS YOUR UNDERSTANDING OF THE REASON(S) THE INFORMATION WAS REFUSED?

CALL RECORD

(a) CALL #	(b) DATE	(c) DAY OF WEEK	(d) TIME AM/PM	(e) IWER ID	(f) CONTACT WITH R/INF/NO ONE	(g) APPT. MADE YES / NO	(h) APPT. KEPT YES/NO/INAP	(j) PROVIDE A COMPLETE DESCRIPTION OF CONTACT OR ATTEMPT TO CONTACT ON THE LINES BELOW. GIVE COMPLETE DETAILS.

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CONTINUE ON A SUPPLEMENTAL CALL RECORD IF NECESSARY

16. IWER: IF '83 SPOUSE IS NOT LIVING WITH R AND A PANEL IW HAS NOT YET BEEN CONDUCTED WITH (HER/HIM), OBTAIN CURRENT ADDRESS INFORMATION BELOW.

17. We'd also like to speak with the person you were married to in 1983. Would you please tell me (her/his) name, current address, and telephone number?

NAME _____

ADDRESS _____

TEL. NO. _____

REMEMBER A (PINK) SPLITOFF COVERSHEET MUST BE FILLED OUT FOR ALL '83 SPOUSES NOT LIVING WITH '83 R. COMPLETE INFORMATION FOR SPLITOFF R IN BOX #1. CONDUCT PANEL INTERVIEW WITH PERSON NAMED IN ITEM 17.