

## Appendix E. Study Participant Baseline Survey

### HUD's Pre-Purchase Homeownership Counseling Demonstration and Impact Evaluation Baseline Survey

The U.S. Department of Housing and Urban Development with Abt Associates is conducting a study on first-time homebuyers. The questions in this survey have been reviewed by the Office of Management and Budget (OMB) under the Paperwork Reduction Act of 1995 (OMB control # xxxx-xxxx, expiration date x/xx/2012). 12 U.S.C. 1701z-2(g)

We'd like to ask you some questions about yourself and if applicable, the people you might be buying a house with. The information collected will be kept private. It is protected by a Federal Law called the Privacy Act of 1974. Your responses will be combined with about 6,000 other participants. Your participation will not affect your mortgage loan process or any benefits you may receive now or in the future. The information you provide will help HUD improve future first-time home buyer and housing counseling programs. The answers you provide will not affect any mortgage lender or housing counseling services you receive.

Answering the questions will take about 25 minutes. Please stop me at any time if you have questions.

#### Section A: Home and Loan Search

*First, I would like to ask you a few questions about your home and loan search process.*

- A1. Have you started the process of searching for a home to purchase?
- a. Yes
  - b. No [Skip to A2b]
  - c. Don't know [Skip to A2]
  - d. Refused [Skip to A2]
- A1a. How many weeks ago did you start the search process?
- a. \_\_\_\_\_ [# in weeks]
  - b. Don't know
  - c. Refused
- A2. [Did you use/Are you currently working with] a real estate agent to search for homes?
- a. Yes
  - b. No
  - c. Don't know
  - d. Refused
- A2b. Have you looked at home listings that show what properties are available? For example, you might have searched listings online, in the newspaper or through a real estate agent.
- a. Yes

- b. No
- c. Don't know
- d. Refused

[IF A1=NO, SKIP TO A4, ELSE CONTINUE]

A3.

A3a. Have you signed a purchase agreement for a home?

- a. Yes [Skip to A3d]
- b. No
- c. Don't know
- d. Refused

A3b. Have you made an offer on a home?

- a. Yes
- b. No [Skip to A3f]
- c. Don't know [Skip to A3f]
- d. Refused [Skip to A3f]

A3c. If you've made more than one offer, think about your most recent offer. Was the offer accepted, rejected, or is it still outstanding?

- a. Accepted
- b. Rejected
- c. Outstanding
- d. Don't know
- e. Refused

A3d. A home inspection is an examination of the physical structures and systems of a house, to identify any problems or needed repairs. Have you had the home inspected?

- a. Yes
- b. No [
- c. Don't know
- d. Refused

A3e. How did you find the home inspector? [ASK OPEN ENDED]

- a. Realtor [
- b. Lender [
- c. Friends/family [
- d. Online listings [
- e. Phone book/newspaper [
- f. Other [
- g. Don't know [
- h. Refused [

[SKIP TO A3G]

- A3f. Have you visited any homes?
- a. Yes
  - b. No [Skip to A4]
  - c. Don't know [Skip to A4]
  - d. Refused [Skip to A4]

- A3g. How many homes have you visited?
- a. \_\_\_\_\_ [
  - b. Don't know [
  - c. Refused [

A4. For each of the following home features, please tell me whether the feature is very important, somewhat important, somewhat unimportant, or not important at all to you in selecting a home.

Features	Very Important	Somewhat Important	Somewhat Unimportant	Not Important	Don't know	Refused
A4a. The number of bedrooms and bathrooms						
A4b. The total square footage						
A4c. The yard or landscaping						
A4d. The home's repair needs						
A4e. The age of the home						

A5. For each of the following neighborhood features, please tell me whether the feature is very important, somewhat important, somewhat unimportant, or not important at all to you in selecting a home.

Features	Very Important	Somewhat Important	Somewhat Unimportant	Not Important	Don't know	Refused
A5a. School quality						
A5b. Safety						
A5d. Convenient location for work						
A5e. Convenient location for leisure activities						
A5e. Close to public transportation						
A5f. Neighborhood appearance and amenities						

A6. What is the most important home or neighborhood feature to you in selecting a home? [ASK OPEN-ENDED]

- a. The number of bedrooms and bathrooms
- b. The total square footage
- c. Age of the home
- d. The yard or landscaping
- e. The home's repair needs
- f. School quality
- g. Safety
- h. Convenient public transportation options
- i. Convenient location for work
- j. Convenient location for leisure activities
- k. Neighborhood appearance and amenities
- l. Other \_\_\_\_\_

A7. Now think about [INSERT NAME OF LENDER]. Where did you hear about this lender?  
[ASK OPEN-ENDED]

- a. This is where I bank
- b. Friends/Family
- c. Online search
- d. Real estate agent
- e. Mortgage broker
- f. Another lender
- g. Advertisement/newspaper
- h. Counseling agency
- i. Local non-profit
- j. Church
- k. Other \_\_\_\_\_
- l. Don't know
- m. Refused

A8. Did you contact any other lenders or brokers for mortgage loan information?

- a. Yes
- b. No [Skip to A11]
- c. Don't know [Skip to A11]
- d. Refused [Skip to A11]

A9. Have you applied for prequalification or submitted a mortgage loan application with any lender or broker? [Prompt: This includes both the lender that told you about the study and any other lenders you have contacted.]

- a. Yes
- b. No [Skip to B1INTRO]
- c. Don't know [Skip to B1INTRO]
- d. Refused [Skip to B1INTRO]

A10. Have any of these applications been denied?

- a. Yes (at least one application has been denied) [Skip to B1INTRO]
- b. No (none of the applications has been denied) [Skip to B1INTRO]
- c. Don't know [Skip to B1INTRO]
- d. Refused [Skip to B1INTRO]

- A11. Prior to contacting this lender, did you search for information about the mortgage loans available through other lenders or brokers?
- a. Yes
  - b. No
  - c. Don't know
  - d. Refused

## Section B: Preparation for Home Purchase

*Now, I would like to ask you a few questions about your preparation for home purchase.*

- B1. Now think about your plans for the future. If you purchase a home, how many years do you think you will live in it? (Prompt: If you don't know, please give us your best guess.)
- a. Less than 1 year
  - b. 1 to 5 years
  - c. 5 to 10 years
  - d. 10-20 years
  - e. More than 20 years
  - f. Don't know
  - g. Refused
- B2. How much do you expect to pay for the home, in terms of total purchase price? If you haven't chosen a home, please give us your best guess of what the purchase price will be. [IF R IS UNSURE PROMPT: Your best estimate is fine.]
- a. \_\_\_\_\_
  - b. Don't know [Skip to B2b]
  - c. Refused [Skip to B3]
- B2a. To confirm, you said \_\_\_\_\_. Did I get that right? [Skip to B3]  
[If no, replace number with the correct figure]
- B2b. If you are unsure how much you expect to pay for your home in terms of purchase price, will it be.....
- a. Less than \$50,000
  - b. \$50,000 to less than \$100,000
  - c. \$100,000 to less than \$150,000
  - d. \$150,000 to less than \$200,000
  - e. \$200,000 to less than \$250,000
  - f. \$250,000 to less than \$300,000
  - g. \$300,000 to less than \$350,000
  - h. \$350,000 to less than \$400,000
  - i. \$400,000 or greater
  - j. Don't know
  - k. Refused
- B3. How much do you currently have available for a down payment? Include money from all sources – including a co-borrower or any assistance you may receive. \_\_\_\_\_  
[IF R IS UNSURE PROMPT: Your best estimate is fine.]

- a. Don't know [Skip to B3b]
- b. Refused [Skip to B4]

B3a. To confirm, you said \_\_\_\_\_. Did I get that right? [Skip to B4]  
 [If no, replace number with the correct figure]

B3b. If you are unsure of how much you currently have available for a down payment, is it.....

- a. Less than \$5,000
- b. \$5,000 to less than \$10,000
- c. \$10,000 to less than \$15,000
- d. \$15,000 to less than \$20,000
- e. \$20,000 to less than \$30,000
- f. \$30,000 to less than \$40,000
- g. \$40,000 or greater
- h. Don't know
- i. Refused

B4. Does this amount include any money from family or friends?  
 a. Yes  
 b. No  
 c. Don't know  
 d. Refused

B5. Does the amount include any money from a grant or down payment assistance program?  
 e. Yes  
 f. No  
 g. Don't know  
 h. Refused

B6. How much are you willing to spend each month for your monthly housing expenses? This amount should include all of your housing-related costs such as mortgage payment, property taxes, homeowners insurance, and homeowner association dues. It should not include utilities like water, trash, or electricity.  
 a. \_\_\_\_\_  
 b. Don't know  
 c. Refused [SKIP TO C1INTRO]

To confirm, you said \_\_\_\_\_. Did I get that right?  
 [If no, replace number with the correct figure]

### Section C: Financial Capability

*C1 INTRO: Next, I would like to ask you a few questions about your financial experiences.*

C1. For each of the following statements, please tell me whether you strongly disagree, disagree, agree, or strongly agree with the statement.

Statements	Strongly Disagree	Disagree	Agree	Strongly Agree	Don't know	Refused
C1a. I occasionally overdraw my checking account.						
C1b. I occasionally don't have enough money to cover all of my bills at the end of the month.						
C1c. I usually have enough savings set aside to cover three months of expenses.						
C1d. I've tried to figure out how much I need to save for retirement?						
C1e. I never use payday lenders.						
C1f. I usually pay my credit card balance in full to avoid interest charges.						
C1g. I usually shop around when choosing a new credit card.						
C1h. I know how to correct inaccurate information in my credit report.						
C1i. I trust banks with my money.						
C1j. I expect home prices in my area to decrease this year.						

### Section D: Mortgage Knowledge

*D1 INTRO: Now, I would like to ask you a few questions about different mortgage options. For each statement I read, tell me whether it is a true statement or a false statement.*

- D1. The interest rate on a mortgage loan is the same thing as the annual percentage rate (APR). (F)
- True
  - False
  - Don't know
  - Refused
- D2. A home equity loan is secured by your house. (T)
- True
  - False
  - Don't know
  - Refused
- D3. When you first get a mortgage loan, only a small portion of your monthly payment, if any, reduces the amount you owe. Most of your monthly payment is applied to interest. (T)

- a. True
  - b. False
  - c. Don't know
  - d. Refused
- D4. The loan officer is legally obligated to tell you if you qualify for a different loan product that has a lower cost. (F)
- a. True
  - b. False
  - c. Don't know
  - d. Refused

### Section E: Current Housing Arrangements

*E1 INTRO: The following questions ask about your current living situation.*

- E1. Do you rent the place where you live?
- a. Yes
  - b. No [Skip to E1d]
  - c. Don't know [Skip to E1d]
  - d. Refused [Skip to E1d]
- E1a. How much do you spend each month on rent? (Note: If R is in a housing situation where R is paying rent with someone, this question asks for the amount of money that only the respondent's pays each month for rent.)
- a. \_\_\_\_\_
  - b. Don't know (Skip to E1b)
  - c. Refused (Skip to E1b)

To confirm, you said \_\_\_\_\_. Did I get that right?  
[If no, replace number with the correct figure]

- E1b. Utilities include things like gas, electricity, water, and trash removal. They don't include things like cable TV, internet, or telephone. How much do you spend each month on utilities? Do not include any utilities that are included in your rent.
- a. \_\_\_\_\_
  - b. Don't know (Skip to E1c)
  - c. Refused (Skip to E1c)

To confirm, you said \_\_\_\_\_. Did I get that right?  
[If no, replace number with the correct figure]

- E1c. How many bedrooms does your rental unit have? [ASK OPEN-ENDED]
- a. Studio [Skip to E1e]
  - b. One bedroom [Skip to E1e]
  - c. Two bedrooms [Skip to E1e]
  - d. Three bedrooms [Skip to E1e]



- e. Four or more bedrooms [Skip to E1e]
- f. Don't know [Skip to E1e]
- g. Refused [Skip to E1e]

- E1d. What is your current housing status? [ASK OPEN-ENDED]
- a. Living at a family member's house
  - b. Living at a friend's house
  - c. A military setting (base, camp, deployment or combat zone)
  - d. Educational institution (residential college, dorm)
  - e. Hotel/motel
  - f. Subsidized Housing
  - g. Homeless Living Situation (Shelter)
  - h. Institutional Facility (mental health, substance abuse)
  - i. A correctional facility/jail or detention center
  - j. Other
  - k. Don't know
  - l. Refused

[NOTE: If respondents report status h or I, the interviewer should clarify the respondent's living situation. Respondents living in institutional facilities should be excluded from the study. IRB rules regarding special protections for vulnerable populations apply.]

E1e. Thinking in general about your current housing situation, how would you rate your level of satisfaction? Would you say you are.....

- a. Very satisfied with your current housing situation
- b. Satisfied with your current housing situation
- c. Unsatisfied with your current housing situation
- d. Very unsatisfied with your current housing situation
- e. Don't know
- f. Refused

- E2. How many people currently live with you, not including yourself?
- a. \_\_\_\_\_ [number of people]
  - b. Don't know
  - c. Refused

- E3. Do you currently own property either in the U.S. or in another country? Include properties like a home, rental property, mobile home, land, or other real estate.]
- a. Yes
  - b. No [Skip to E4]
  - c. Don't know [Skip to E4]
  - d. Refused [Skip to E4]

- E3a. Is the property in the United States?
- a. Yes
  - b. No [Skip to E4]
  - c. Don't know [Skip to E4]
  - d. Refused [Skip to E4]

E3b. Is the property a home, mobile home, rental property, or vacant piece of land?

- a. Home
- b. Mobile home
- c. Rental
- d. Vacant
- e. Other \_\_\_\_\_
- f. Don't know
- g. Refused

E4. Have you ever previously lost a home or other property through foreclosure?

- i. Yes
- j. No [Go to F1INTRO]
- k. Don't know [Go to F1INTRO]
- l. Refused [Go to F1INTRO]

E4a. What year did the foreclosure happen?

- a. \_\_\_\_\_ (year)
- b. Don't know
- c. Refused

## Section F: Budgeting and Debts

*F1 INTRO: Next, I would like to ask you a few questions about different sources of income you may receive.*

F1. Please think about the total income you have available to pay your monthly mortgage payment each month. If you expect to have co-borrowers on your loan, think about the total for yourself and the co-borrowers.

Thinking about the last year, does this income include:

	Yes	No	DK	Ref
a. Income from self-employment				
b. Wages or salary from a job				
c. Rent or other income from an investment property				
d. Interest, dividend, or other investment income				
e. Child support payments, alimony, or maintenance payments				
f. Social Security retirement or disability benefits				
g. Other pensions or retirement income				
h. Public assistance or Earned Income Tax Credit benefits				
i. Unemployment benefits				
j. Veterans' benefits				
k. Other income				

F2. What is the total amount of income that you and any co-borrowers received in the last 12 months? Include income from all sources and tell me the total amount before any taxes or deductions are removed. [IF R IS UNSURE PROMPT: Your best estimate is fine.]

- a. \$ \_\_\_\_\_
- b. Don't know [Skip to F2b]
- c. Refused [Skip to F4]

F2a. To confirm, you said \_\_\_\_\_. Did I get that right? [Skip to F3]  
[If no, replace number with the correct figure]

F2b. If you are unsure of your total income that you and any coborrowers received in the last 12 months, was it.....

- a. Less than \$10,000
- b. \$10,000 to less than \$25,000
- c. \$25,000 to less than \$40,000
- d. \$40,000 to less than \$55,000
- e. \$55,000 to less than \$70,000
- f. \$70,000 to less than \$85,000
- g. \$85,000 to less than \$100,000
- h. \$100,000 or greater
- i. Don't know
- j. Refused

F3. Does this amount include income from anyone other than yourself?

- a. Yes
- b. No [Skip to F4]
- c. Don't know
- d. Refused [Skip to F4]

F3a. Thinking only about your own income, what is the total amount of income you received in the last 12 months? Tell me the total amount before any taxes or deductions are removed. . [IF R IS UNSURE PROMPT: Your best estimate is fine.]

- a. \$ \_\_\_\_\_
- b. Don't know [Skip to F3c]
- c. Refused [Skip to F4]

F3b. To confirm, you said \_\_\_\_\_. Did I get that right? [Skip to F4]  
[If no, replace number with the correct figure]

F3c. If you are unsure of your total amount of income received in the last 12 months, was it.....

- a. Less than \$10,000
- b. \$10,000 to less than \$25,000
- c. \$25,000 to less than \$40,000
- d. \$40,000 to less than \$55,000
- e. \$55,000 to less than \$70,000
- f. \$70,000 to less than \$85,000

- g. \$85,000 to less than \$100,000
- h. \$100,000 or greater
- i. Don't know
- j. Refused

- F4. A budget is a spending plan for your monthly household expenses. Do you have a budget?
- a. Yes
  - b. No [go to F7]
  - c. Don't know [go to F7]
  - d. Refused [go to F7]
- F5. About how often do you compare the budget to your actual spending?
- a. Often
  - b. Sometimes
  - c. Rarely
  - d. Never
  - e. Don't know
  - f. Refused
- F6. Thinking back on the past year, about how often were you able to stick to your budget?
- a. Often
  - b. Sometimes
  - c. Rarely
  - d. Never
  - e. Don't know
  - f. Refused
- F7. Being short of money means that you brought in less money than you spent and had to do something to get through the month, like using credit cards, taking money out of savings, or borrowing money. Over the past year, how often were you short of money?
- a. Often
  - b. Sometimes
  - c. Rarely
  - d. Never
  - e. Don't know
  - f. Refused
- F8. Saving money means spending less than you earn, and putting the extra money aside for retirement, education, or to build a financial cushion. About how often do you save money?
- a. Often
  - b. Sometimes
  - c. Rarely
  - d. Never
  - e. Don't know
  - f. Refused
- F9. Do you currently have a checking account?
- a. Yes
  - b. No (Skip to F10)
  - c. Don't know (Skip to F10)
  - d. Refused (Skip to F10)

- F9a. IF YES: How much money do you currently have in checking accounts? Please round to the nearest 100. [Prompt: If you have more than one checking account, please tell us the total amount in these accounts.]
- \_\_\_\_\_
  - Don't know (Skip to F10)
  - Refused (Skip to F10)
- F9b. To confirm, you said \_\_\_\_\_. Did I get that right?  
[If no, replace number with the correct figure]
- F10. Do you currently have a savings account?
- Yes
  - No (Skip to F11)
  - Don't know (Skip to F11)
  - Refused (Skip to F11)
- F10a. IF YES: How much money do you currently have in savings accounts? Please round to the nearest 100. [Prompt: If you have more than one savings account, please tell us the total amount in these accounts.]
- \_\_\_\_\_
  - Don't know (Skip to F11)
  - Refused (Skip to F11)
- F10b. To confirm, you said \_\_\_\_\_. Did I get that right?  
[If no, replace number with the correct figure]
- F11. Do you currently have any retirement accounts, like 401(k) or 403(b) accounts, IRAs, or other pension accounts through work?
- Yes
  - No (Skip to F12)
  - Don't know (Skip to F12)
  - Refused (Skip to F12)
- F11a. IF YES: How much money do you currently have in such accounts?
- \_\_\_\_\_
  - Don't know (Skip to F12)
  - Refused (Skip to F12)
- F11b. To confirm, you said \_\_\_\_\_. Did I get that right?  
[If no, replace number with the correct figure]
- F12. Aside from your savings accounts and retirement accounts, do you currently have any other money market accounts, certificates of deposit, mutual funds, or brokerage accounts?
- Yes
  - No (Skip to F13)
  - Don't know (Skip to F13)
  - Refused (Skip to F13)
- F12a. IF YES: How much money do you currently have in such accounts?

- a. \_\_\_\_\_
- b. Don't know (Skip to F13)
- c. Refused (Skip to F13)

F12b. To confirm, you said \_\_\_\_\_. Did I get that right?  
[If no, replace number with the correct figure]

- F13. Do you have any other source of savings that would be available if you lost your job or had a financial emergency? For example, this might include savings at home or savings with others who are keeping it safe.
- a. Yes
  - b. No (Skip to F14)
  - c. Don't know (Skip to F14)
  - d. Refused (Skip to F14)

F13a. IF YES: About how much would be available?

- a. \_\_\_\_\_
- b. Don't know (Skip to F14)
- c. Refused (Skip to F14)

F13b. To confirm, you said \_\_\_\_\_. Did I get that right?  
[If no, replace number with the correct figure]

- F14. To confirm, your responses include a total of \_\_\_\_\_ in savings and investments. Does that sound about right?
- a. Yes (Skip to F15)
  - b. No
  - c. Don't know (Skip to F15)
  - d. Refused (Skip to F15)

F14a. IF NO: What is the total amount across all of these accounts?  
[Correct the responses to the previous questions]

- F15. Now pretend that you have already purchased a home. If you started having financial problems and could not pay all of your bills, which bill would you pay first?
- a. Credit card
  - b. Utilities (gas, electricity, water, etc.)
  - c. Car payment
  - d. Mortgage
  - e. Student loan
  - f. Health insurance
  - g. Other \_\_\_\_\_
  - h. Don't know
  - i. Refused

- F16. Do you currently have health insurance coverage?
- a. Yes
  - b. No
  - c. Don't know
  - d. Refused

- F17. Is there anyone in your household—such as a spouse, child, or other dependent—who currently does not have health insurance coverage?
- Yes
  - No
  - Don't know
  - Refused

**Section G: Learning and Planning Preferences**

G1. I now have some questions about your general preferences and experiences. For each of the following statements, please tell me whether you strongly disagree, disagree, agree, or strongly agree with the statement.

Statements	Strongly Disagree	Disagree	Agree	Strongly Agree	Don't know	Refused
G1a. As a student, I enjoyed going to school.						
G1g. I usually spend a lot of time researching and planning for large purchases						
G1h. It is easy for me to stick to my aims and accomplish my goals						
G1b. I am pretty good at math						

G2. For the next question, please imagine that you will be getting a payment and have options for when to receive the money.

G2a. Would you rather get 40 dollars now or 50 dollars a month from now?

- 40 dollars now
- 50 dollars a month from now [Skip to H1INTRO]
- Don't know
- Refused [Skip to H1INTRO]

G2b. Would you rather get 40 dollars now or 80 dollars a month from now?

- 40 dollars now
- 80 dollars a month from now
- Don't know
- Refused

**Section H: Demographics**

*H1 INTRO: Finally, I would like to ask a few questions about your personal characteristics.*

H1. To confirm for demographic purposes, what is your gender? [OPENED ENDED]?

- Male
- Female
- Transgender

- d. Refused
- H2. Which of the following best describes your current marital status?
- a. Married
  - b. Living with an unmarried partner
  - c. Divorced
  - d. Separated
  - e. Widowed
  - f. Single never married
  - g. Don't know
  - h. Refused
- H3. How many people would live with you if you bought a home?
- a. \_\_\_\_\_
  - b. Don't know
  - c. Refused
- H4. How many of these people are under the age of 18?
- a. \_\_\_\_\_
  - b. Don't know
  - c. Refused
- H5. Are you currently employed full time or part time? [IF SELF-EMPLOYED OR HOURS VARY, ASK WHETHER HE/SHE WOULD TYPICALLY WORK MORE THAN 30 HOURS PER WEEK]
- a. Full-time employment (30+ hours per week)
  - b. Part-time employment (1-29 hours per week)
  - c. Unemployed and looking for work
  - d. Not working/Homemaker/Retired
  - e. Student
  - f. Other\_\_\_\_\_
  - g. Don't know
  - h. Refused
- H6. Of the other adults in your household that would live with you, how many are not employed full time or part time?
- a. \_\_\_\_\_
  - b. Don't know
  - c. Refused
- H7. Are you or any adult household members veterans of the U.S. Armed Services?
- a. Yes
  - b. No
  - c. Don't know
  - d. Refused
- H8. What is the highest level of education that you have completed?
- a. Less than a high school diploma
  - b. High school diploma
  - c. Some college but no degree



- d. 2 year degree
- e. 4 year degree
- f. Graduate/professional degree
- g. Don't know
- h. Refused

H10. Do you consider yourself to be of Hispanic or Latino origin?

- a. Yes
- b. No
- c. Don't know
- d. Refused

H11. What race do you consider yourself to be? You may indicate more than one.

- a. American Indian/Alaska Native
- b. Asian
- c. Black or African American
- d. Native Hawaiian or Other Pacific Islander
- e. White
- f. Other race \_\_\_\_\_
- g. Don't know
- h. Refused

**Section I: Contact Information**

Thank you very much for your time. We are almost done. We will be sending you a check for \$30 within the next four weeks. To make sure we send your check to the correct address, we would like to confirm your address, as well as a mailing address if it differs from your home one. This information will be kept strictly confidential.

First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_

Last Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Preferred phone \_\_\_\_\_ Phone number type: [home/cell/work] \_\_\_\_\_

Additional phone number \_\_\_\_\_ Phone number type: [home/cell/work] \_\_\_\_\_

Email \_\_\_\_\_

**INTERVIEWER:** PROBE TO GET FULL ADDRESS AND READ IT BACK TO CONFIRM SPELLING.

**As part of this study, we will be contacting you for follow-up study activities as mentioned in the consent process. Which of the following ways do you preferred to be contacted?**

- a. Preferred phone number provided
- b. Email
- c. Text message [IF STUDY PARTICIPANTS SELECT TEXT MESSAGE, PLEASE INFORM THEM THAT STANDARD TEXT MESSAGING RATES APPLY.]
- d. Other (Please specify)

**As part of this study, in approximately 12 months we will be conducting a follow-up telephone survey. To ensure we will be able to get in touch with you, we would like to collect information for some friends or relatives who do not live with you and will know how to contact you in the future.**

**Contact #1**

Name of additional contact \_\_\_\_\_

Additional contact's relationship to you \_\_\_\_\_

Email of additional contact \_\_\_\_\_

Address of additional contact \_\_\_\_\_

Preferred phone number of additional contact \_\_\_\_\_

Phone number type: [home/cell/work] \_\_\_\_\_

Additional phone number of additional contact \_\_\_\_\_

Phone number type: [home/cell/work] \_\_\_\_\_

**Contact #2**

Name of additional contact \_\_\_\_\_

Additional contact's relationship to you \_\_\_\_\_

Email of additional contact \_\_\_\_\_

Address of additional contact \_\_\_\_\_

Preferred phone number of additional contact \_\_\_\_\_

Phone number type: [home/cell/work] \_\_\_\_\_

Additional phone number of additional contact \_\_\_\_\_

Phone number type: [home/cell/work] \_\_\_\_\_

**Contact #3**

Name of additional contact \_\_\_\_\_

Additional contact's relationship to you \_\_\_\_\_

Email of additional contact \_\_\_\_\_

Address of additional contact \_\_\_\_\_

Preferred phone number of additional contact \_\_\_\_\_

Phone number type: [home/cell/work] \_\_\_\_\_

Additional phone number of additional contact \_\_\_\_\_

Phone number type: [home/cell/work] \_\_\_\_\_

**CLOSING:** Thanks again for taking the time to speak with me today. Within 48 business hours you will receive an email from the study team notifying you of the group you will be part of. A letter will be following in the mail. If you have any questions about this study or your assignment, please call the study's hotline at XXX-XXX-XXXX.

