

**PERSONAL DATA AND SOCIOECONOMIC STATUS (PDS) FORM  
INSTRUCTIONS**

**VERSION A, 06/12/2000**

Prepared: 06/12/2000

**I. GENERAL INSTRUCTIONS**

The Personal Data and Socioeconomic (PDS) form is the final data collection component of the Home Induction Interview and is perhaps the most sensitive component of this interview. The PDS collects information on participant and formal occupation, education, income and wealth as well as perceived status. The placement of these items at the end of the interview is because significant rapport will hopefully have been established between the participant and the interviewer by this point in the interview process. The exact wording and order should be followed to assure standardization. The interviewer must be certified and have working knowledge of the document titled "General Instructions for completing Paper Forms" prior to completing this form. ID, Contact Year and Name are completed as described in that document. Initiate the form by reading the script at the beginning of the form as printed. This script is intended to achieve a commitment from the participant to answer this set of questions.

**II. SPECIFIC INSTRUCTIONS**

- (1) Record city, town, county and state of birth. If not born in US, record country of birth. This item does not capture information on where the respondent actually grew up or was raised. If they only came to a city or town for the actual birth and immediately returned to their home town, make a marginal note, but record the place of birth indicated on the birth certificate.
- (2) The intent of this item is to determine the respondent's rating of their overall community standing. Read the question exactly as written. Hand respondent Ladder Card #1 and instruct to use the card in responding to the question. Item 2b requests the respondent to define 'community' as they used the term in item 2a. Record number between 1 and 10 provided by respondent. Record the definition of community in the letter blocks provided. If there is insufficient space, record as note in note log on the form for clarification upon return to the office.
- (3) This item assesses the participant's current job status. Hand Response Card #2. Record response provided by respondent. If WORKING NOW, FULL OR PART TIME, or RETIRED BUT WORKING FOR PAY, SKIP to Item 5. Otherwise, continue with next question.

Items 4 – 12 are intended to obtain detailed information about the participant's job and job history. Ask each question as written using appropriate probes as needed.

- (4) Record year of last regular job for pay. If respondent has never held a job for pay, enter 9999.
- (5) This item assesses the number of current jobs held by the participant. Record ONE or MORE THAN ONE
- (6) This item assesses the title of the participant's job. Record job title of main occupation of job. Probe to obtain job title using examples as needed to assure you do not simply get the place of employment. Record YES or NO for self-employed status.
- (7) This item seeks information on the activities or duties of the participant's job. Record job activities. Probe to obtain most important activities or duties using examples as indicated.
- (8) This item pertains to the category or types of business/industry. Record type of business or industry. Probe to obtain exact name of business or industry if possible.
- (9) This item assesses the total number of years the participant worked at her/his main job. Select appropriate verb tense. Record number of whole years, rounding to the nearest whole year. Record regularity of work. If OTHER, specify regularity.
- (10) This item pertains to any period of unemployment of more than six months duration. Record YES or NO. If NO, SKIP to Item 11. If YES, record number of times the participant was unemployed.
- (11) This item assesses the participant's satisfaction with her/his job.
- (12) This item asks about the participant's first full-time job. Record job title of first job. Probe for actual job title rather than duties or place of work. If s/he cannot recall, the interviewer may ask about age of first employment or place, or a specific event to assist the respondent to recall.
- (13-16) Items 13 – 16 are intended to obtain respondent self-rating of life achievement based on a 10 point scale where 10 is the best way of life and 1 is the worst way of life. Read the questions as written. If the respondent is not clear, re-ask the question stem as well as the item. Hand respondent RESPONSE CARD #3. For each item, record number from 1-10 specified by respondent. Assure the respondent there is no right or wrong answer.

- (17) This item assesses level of disappointment if they could not reach their expectation in item 16. .
- (18) This question determines the duration of formal education completed by the respondent. Responses to this item are the number of years of school completed. If respondent is currently in school, only record actual completed program. For High School or less, record the actual number of years attended. If only a partial year was attended, record the last year which was completely finished (for example, dropped out in junior year, record 10). If LESS THAN 12 YEARS completed, record YES or NO to completion of a GED. If 12 years completed, record highest completed level of post secondary education.
- (19) This question determines the extent of education other than formal education. Record YES or NO. If YES, specify the type of other training or educational programs.
- (20) DO NOT ASK QUESTION. Record YES or NO based on current partner relationship from Items 1 and 2 in the Social Support (SOC) form. If NO, SKIP to Item 24.
- (21-22) These Items obtain information regarding spouse/partner job, corresponding to similar questions already asked about the respondent. Select appropriate parenthetical description of current relationship. Record YES, CURRENTLY; YES, IN THE PAST; or NO. If NO, SKIP to Item 23a.
- (22a) Record actual job title of partner main occupation or job. Probe to obtain job title using exemplars as listed.
- (22b) Record duties. Probe to obtain main activities using exemplars as listed.
- (22c) Record type of business or industry. Probe to obtain actual name of business or industry if possible.
- (23) Record highest completed year of education for partner using same format as for Item 18 above.

The final questions concern family finances and wealth. Read script as printed to notify respondent that the following questions have to do with family finances. This script is to remind the participant of his/her commitment to answer the questions and to assure confidentiality of responses. Record response as given by participant. If necessary, read response categories again after completing each question.

- (24) This item assesses payment status for participant living arrangements. Read all responses and circle appropriate rental, purchase or ownership response for her/his living arrangements.

- (25) This item assesses the number of vehicles. Record number of cars as YES, ONE; YES, MORE THAN ONE; or NO.
- (26) This item asks about liquid assets. Hand respondent Response Card # 4. Record letter of alphabet corresponding to amount of liquid assets as given by respondent. Clarify as needed that this means anything s/he sell quickly OTHER THAN her/his principal home
- (27) a -- i. This item requests information on the source of household income. Read each item in the listing recording YES, NO or REFUSED for each potential source of personal household income.
- (28) Hand respondent Response Card # 5. Record letter of alphabet corresponding to total combined family income as given by respondent. If respondent is unsure or is hesitant to answer the question using the categories on the Response Card, ask Item 28a. Continue this series of questions with careful attention to the SKIP patterns in order to locate the respondent's income within a category. If the respondent does not want to answer the questions, continue on to Item 29. The interviewer may again reiterate the confidentiality of the information and the importance of this information in ascertaining the reasons for heart disease in African-Americans.
- (29) This item requests the participant's individual contribution to the total family income. Hand respondent Response Card # 5. Ask this question of ALL respondents even if they refused to answer Item 28, above. Record letter of alphabet corresponding to participant's individual income as given by the respondent.
- (30) Record number of persons supported by total family income.
- (31) Record number of persons including respondent, who lived in household during past 12 months. In Item 31b, record number of persons under the age of 18.
- (32) This Item is intended to obtain responded self-rating of their overall standing in the United States. Read the question exactly as written. Hand Response Card #6 and instruct to select the member best representing their position on the ladder. Record number between 1 and 10 as given by the respondent.

### **Administrative Information**

- (33) Enter date of data collection.
- (34) Enter 3-digit JHS interviewer code of person completing the form.

