SECTION V: TAKING THE INTERVIEW AND QUESTIONNAIRE OBJECTIVES (QxQS)

The following pages describe each section of the questionnaire and relate the study concepts from Section II to specific questions and sequences. In addition, we introduce section-specific concepts, such as work and income.

For the most part, the PSID questionnaire contains one question per screen, though, at some screens, you are required to enter more than one response. This section doesn’t spend much time instructing you how to use CATI (refer to your Basic CATI instructions if you need help); instead, it concentrates on what each question is asking, and how you gather and enter the data.

Some questions do not appear in this section. Those screens are not included because they are straight forward or self-explanatory questions, or because they have sufficient instructions right on the screen (in capital letters—yellow on red).

If you are unsure about how to handle a specific question that is not addressed in this section, please ask your shift supervisor or team leader. If you still cannot find an answer, complete a Project Manager Project form.
Hello, my name is Stephanie Chardoul. I am calling from the University of Michigan in Ann Arbor. First, I would like to make sure that I dialed the right number. May I talk to DAVID P RHOSTLE, JR?

VOLUNTARY STATEMENT

Before I begin, I want you to know that this interview is completely voluntary and confidential. In addition, if we should come to any question which you don't want to answer, just let me know and we'll go on to the next question.
Part 1: Preamble and Coverscreen

Preamble Screen

The preamble screen contains several items of information that are important for you to note before calling any case.

The name, address, and phone number of last year’s R are displayed. The address and phone number are in editable fields—if you find that R’s address and/or phone number has changed before you complete the interview, please access the case and update the information here.

Race is a one-digit code indicating the race of the Head or Wife/"Wife." This is also coded on paper coversheets on page 1, item 3.

1 = White
2 = Black
3 = Hispanic/Latino
4 = Asian/Pacific Islander
5 = Native American
7 = Other
9 = Unknown
0 = Unknown (Recontacts and Splitoffs)

Language is a one-digit code that indicates in which language last year’s interview was conducted.

1 = English
2 = Spanish
7 = Other
9 = Unknown (Recontact cases only)

Coversheet Type is a one-digit code that indicates which type of sample this case is.

1 = Reinterview
2 = Splitoff
3 = Recontact

Mode Of Interview Last Year is a one-digit code that indicates how the interview was conducted.

0 = Face to Face
1 = Telephone
2 = Mail

Year Interview Sensitive and Reason Sensitive Interview indicate whether there has been a problem with this family in the past. Please see Appendix 4 for a complete list of problem codes.

Voluntary Statement

Read this statement of confidentiality to all Respondents—this is required by law!
HOUSEHOLDER

I'd like to begin by asking in whose name is (your/this) home owned or rented?

NAME:

Do you/Does (NAME) live there in the household?

YES
NO

[IF "YES" SELECTED, USE [F10] TO GO TO THE NEXT SCREEN]

[IF "NO"]: Who living there provides the major financial support for the family?

NAME:

FAMILY LISTING

VERIFY FU  Last year we had (RTH, Name) listed as living in your household. Is (Name) living in your household now?
[IF "NO", GO TO FU/HU AND USE F3 TO SELECT]

UPDATE FU/HU  Is there anyone else living there now that I did not mention, including any newborn children?

HOUSEHOLDER  John Martin
[GO TO HH AND TYPE "YES" FOR NAMED PERSON(S)]

RTH  FU/HU  FIRST NAME  LAST NAME  HH  S.S  92AGE  PN

MALE HEAD  FU  DAVID P.  RHOSTLE, JR  .  NO  41  171
WIFE  FU  EPHNYA  RHOSTLE  .  YES  40  003
SON  FU  KEVIN  RHOSTLE  .  YES  21  030
DAUGHTER  FU  DANIELLE  RHOSTLE  .  YES  17  032
.
.
.
.
LIST COMPLETE  MORE PEOPLE

58
Householder

The householder is, by definition, the person or persons in whose name the home is owned or rented, as long as this person or persons actually live in the household. Enter the name the Respondent gives you, then ask if that person is living there. If the named person is a household member, select YES, press [Enter] then use [F10] to go on to the next screen. If NO, you must ask the follow-up question and enter the name of the person who provides the major financial support for the FU in the second NAME field. The name(s) entered on this screen will be displayed on the FAMILY LISTING screen because you need to indicate which household member(s) is considered the householder. If you select YES on this screen, only the name(s) entered in the first NAME field will be displayed on the FAMILY LISTING screen. If NO is selected, only the name(s) entered in the second NAME field will be displayed. This information will be useful in helping you choose a New Head, when necessary.

Family Listing

This screen is called the FAMILY LISTING. Everyone who was an FU Member last year and all individuals who were institutionalists at the time of last year’s interview are prelisted here. It does not include people who were HU or HU/CS Members last year. Update the information for each prelisted person, then add to the listing all other persons currently living in the household.

The RELATIONSHIP (RTH) column indicates each individual’s relationship to Head. The FU/HU column indicates each individual’s status—most importantly whether they are FU Members, HU or HU/CS Members, or are no longer in the Family Unit. The HOUSEHOLDER (HH) column is where you indicate the individual who was mentioned on the previous (HOUSEHOLDER) screen. Note the name filled for Householder in the top section of the screen, and type YES in the HH column for that person (leaving the column blank for all other individuals).

92 AGE is included here for identification purposes, but this, along with PERSON NUMBER (PN) and SAMPLE STATUS (SS), cannot be edited (this is much more obvious on a color computer monitor than it is here in the Study Guide).

Each FAMILY LISTING screen has space for six persons, and there are four such screens. If more than six persons were listed last year, LIST COMPLETE would not appear as an option at the bottom of the screen, forcing you to choose MORE PEOPLE to review/update the next screen(s). When you have completed updating the FAMILY LISTING, highlight LIST COMPLETE and press [Enter].
### FAMILY LISTING

**VERIFY FU**

- Last year did everyone living in your household now?
  - [IF "NO", ]
  - [FU M/I *JAIL*]
  - [M/O *MIL*]

**UPDATE FU/HU**

- Is there someone you did not mention, including:
  - [DIED *EDUC*]
  - [HU/CS *HLTH*]
  - [HU *OTH*]
  - [GO TO HH FU]

**HOUSEHOLDER**

- John Mart

**GO TO HH FU**

<table>
<thead>
<tr>
<th>RTH</th>
<th>HH</th>
<th>S.S</th>
<th>92AGE</th>
<th>PN</th>
</tr>
</thead>
<tbody>
<tr>
<td>MALE HEAD</td>
<td>FU</td>
<td>DAVID P. RHOSTLE, JR</td>
<td>NO</td>
<td>41</td>
</tr>
<tr>
<td>WIFE</td>
<td>FU</td>
<td>EPHNYA RHOSTLE</td>
<td>YES</td>
<td>40</td>
</tr>
<tr>
<td>SON</td>
<td>FU</td>
<td>KEVIN RHOSTLE</td>
<td>YES</td>
<td>21</td>
</tr>
<tr>
<td>DAUGHTER</td>
<td>FU</td>
<td>DANIELLE RHOSTLE</td>
<td>YES</td>
<td>17</td>
</tr>
</tbody>
</table>

**LIST COMPLETE**

| MORE PEOPLE |

**RTH**

<table>
<thead>
<tr>
<th>S.S</th>
<th>92AGE</th>
<th>PN</th>
</tr>
</thead>
<tbody>
<tr>
<td>MALE HEAD</td>
<td>DIED</td>
<td>DAVID P. RHOSTLE, JR</td>
</tr>
<tr>
<td>WIFE</td>
<td>FU</td>
<td>EPHNYA RHOSTLE</td>
</tr>
<tr>
<td>SON</td>
<td>FU</td>
<td>KEVIN RHOSTLE</td>
</tr>
<tr>
<td>DAUGHTER</td>
<td>FU</td>
<td>DANIELLE RHOSTLE</td>
</tr>
</tbody>
</table>

**LIST COMPLETE**

| MORE PEOPLE |
To update the status of individuals no longer living in the FU, highlight the individual’s FU/HU code and use [F3] to invoke the pop-up menu containing the possible FU/HU codes. In addition, all people who move into the FU will require the selection of an FU/HU code, as will household members not included in the FU. Use your arrow keys to move around within the pop-up menu and press [Enter] when the appropriate code is highlighted.

**FU M/I:** Any individual who has moved into the FU; this includes persons who were institutional last year and now have moved back home.

**M/O:** Any individual who has moved out of the FU, unless she/he has died or is a Sample Member who has moved to an institution; this also includes persons listed as institutional members who now have set up their own households.

**DIED:** Any individual who has died.

**HU/CS:** Any non-FU Member living in the household who is included as an FU Member on another case.

**HU:** Any non-FU Member living in the household who is not included as an FU Member on another case (e.g., a roommate who doesn’t share expenses, a relative living with this family only temporarily).

**IRST**: Any Sample Member who is now in jail, in the military, in college, or in a health care facility (see choices listed on the right side of the pop-up menu).

**FU:** Any listed FU Member whose status has not changed. This code should never be selected, except to correct a status change that should not have been made.

To change the relationship to Head of an individual still living in the FU, move your cursor to the RTH column and use [F3] to invoke the pop-up menu containing RTH codes. The same procedure is used for identifying all persons added to the Family Listing. The RTH for individuals who have moved out, died, or entered institutions since last year’s interview should not be updated. The almost 100 RTH codes (see the following page for a complete list) are grouped by type of relationship, with those most commonly used located at the top of the menu. To find a specific code, you can scroll through the menu using the arrow keys until the appropriate RTH code is highlighted. But it is often more efficient to use the Search function, which allows you to start typing each letter of the code that you want, and that code will automatically be highlighted. To select the highlighted code, press [Enter].

All of the RTH codes are gender-specific, so the codes include Male Head as distinct from Female Head. It is very important that these codes be selected carefully, both for the accuracy of the data and because these selections determine future fills in the remainder of the questionnaire. Please also note the separate codes for New Male Head, New Female Head, New Wife, and New "Wife."
## Key To Relationship (RTH) Codes

<table>
<thead>
<tr>
<th>Relation Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>MALE/FEMALE HEAD</td>
<td>Head of the Family Unit</td>
</tr>
<tr>
<td>NEW MALE/FEMALE HEAD</td>
<td>Head of the Family Unit—different than last year’s Head</td>
</tr>
<tr>
<td>WIFE</td>
<td>A woman who is legally married to HEAD, according to the Respondent</td>
</tr>
<tr>
<td>NEW WIFE</td>
<td>A woman who is legally married to HEAD, who was not a Wife on last year’s Family Listing</td>
</tr>
<tr>
<td>&quot;WIFE&quot;</td>
<td>This person is not married to HEAD, but they have been living together as a couple for twelve months or two consecutive interviews.</td>
</tr>
<tr>
<td>NEW &quot;WIFE&quot;</td>
<td>Same as a &quot;WIFE,&quot; but this person was not a &quot;WIFE&quot; on last year’s Family Listing (probably prelisted as G’FRIEND).</td>
</tr>
<tr>
<td>B’FRIEND or G’FRIEND</td>
<td>A friend of the opposite sex who lives with the HEAD as a couple. These terms are used for the first year that they live together. The next year, a G’FRIEND will become a &quot;WIFE&quot; and a B’FRIEND will become HEAD.</td>
</tr>
<tr>
<td>SON or DAUG</td>
<td>Natural or adopted child of HEAD. Stepchildren are not included here.</td>
</tr>
<tr>
<td>STEPSON or STEPDAUG</td>
<td>Child of the WIFE but not the HEAD. Children of the &quot;WIFE&quot; or G’FRIEND are not included here.</td>
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<tr>
<td>&quot;STSON&quot; or &quot;STDAUG&quot;</td>
<td>Child of the &quot;WIFE&quot; but not the HEAD. Children of G’FRIEND are not included. See SON-FRND or DAU-FRND.</td>
</tr>
<tr>
<td>SONINLAW or DAUINLAW</td>
<td>This person is married to a child or step-child of the HEAD.</td>
</tr>
<tr>
<td>FOSTRSON or FOSTRDAU</td>
<td>Foster child of the HEAD.</td>
</tr>
<tr>
<td>BROTHER or SISTER</td>
<td>Sibling of the Head. It also includes half- and step-siblings.</td>
</tr>
<tr>
<td>BROINLAW or SISINLAW</td>
<td>Spouse of HEAD’s sibling or the sibling of the WIFE. Siblings of &quot;WIFE&quot; or G’FRIEND are not included here.</td>
</tr>
<tr>
<td>&quot;BINLAW&quot; or &quot;SINLAW&quot;</td>
<td>Siblings of the &quot;WIFE,&quot; G’FRIEND or B’FRIEND.</td>
</tr>
<tr>
<td>FATHER or MOTHER</td>
<td>Parents or stepparents of the HEAD.</td>
</tr>
<tr>
<td>FAINLAW or MOINLAW</td>
<td>Parents of the WIFE. Parents of &quot;WIFE&quot; or G’FRIEND are not included here.</td>
</tr>
<tr>
<td>&quot;FINLAW&quot; or &quot;MINLAW&quot;</td>
<td>Parents of a &quot;WIFE,&quot; G’FRIEND, or B’FRIEND.</td>
</tr>
</tbody>
</table>
G'SON or G'DAU  
Grandchildren of HEAD or WIFE. G'FRIEND's or "WIFE's" grandchildren are not included—they are called REL-FRIEND.

GG'SON or GG'DAU  
Great-grandchildren of HEAD or WIFE. Great-grandchildren of "WIFE," G'FRIEND or B'FRIEND are not included—they are called REL-FRIEND. Grandparent or step-grandparent of the HEAD.

G'FATHER or G'MOTHER  
Great-grandparent or step-great-grandparent of the HEAD.

GG'FATH or GG'MOTH  
Grandparent or step-grandparent of the WIFE.

G'FA-WF or G'MO-WF  
Great-grandparent or step-great-grandparent of the WIFE.

NEPHEW or NIECE  
Nephew or niece of HEAD; that is, the child of one of HEAD's siblings.

NEPHW-WF or NIECE-WF  
Nephew or niece of WIFE. These are children of one of the WIFE's siblings.

UNCLE or AUNT  
Brothers or sisters of the HEAD's parents.

UNCLE-WF or AUNT-WF  
Brothers or sisters of the WIFE's parents.

COUSIN-M or COUSIN-F  
Child of HEAD's AUNT or UNCLE (note gender-specific codes).

COUSIN-M-WF or COUSIN-F-WF  
Child of the WIFE's uncle (UNCLE-WF) or aunt (AUNT-WF).

SON-FRND or DAU-FRND  
Child of the G'FRIEND or B'FRIEND, but not of the HEAD. Children of "WIFE" are not included here—they are coded "STSON" or "STDAUG."

HUSBAND (OF HEAD)  
This is the husband of a married FEMALE HEAD; he is incapacitated, unable, or unwilling to be HEAD.

REL-HD-M/F or REL-WF-M/F  
Any relative of the HEAD or WIFE who doesn't fit the above categories (e.g., HEAD's or WIFE's great aunt). Note the gender-specific codes.

REL-FRND-M/F  
Any relative of the "WIFE," G'FRIEND or B'FRIEND who doesn't fit the other categories above. Note the gender specific codes.

NONREL-M/F  
These are miscellaneous friends, roommates, etc., who are not related to the family.
**FAMILY LISTING**

**VERIFY FU**  
Last year we had (RTH, Name) listed as living in your household. Is (Name) living in your household now?  
[If "NO", GO TO FU/HU AND USE F3 TO SELECT]

**UPDATE FU/HU**  
Is there anyone else living there now that I did not mention, including any newborn children?

**HOUSEHOLDER**  
John Martin  
[GO TO HH AND TYPE "YES" FOR NAMED PERSON(S)]

<table>
<thead>
<tr>
<th>RTH</th>
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<th>PN</th>
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LIST COMPLETE  
MORE PEOPLE

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**FAMILY LISTING**

**VERIFY FU**  
Last year we had (RTH, Name) listed as living in your household. Is (Name) living in your household now?  
[If "NO", GO TO FU/HU AND USE F3 TO SELECT]

**UPDATE FU/HU**  
Is there anyone else living there now that I did not mention, including any newborn children?

**HOUSEHOLDER**  
John Martin  
[GO TO HH AND TYPE "YES" FOR NAMED PERSON(S)]

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LIST COMPLETE  
MORE PEOPLE

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**FAMILY LISTING**

**VERIFY FU**  
Last year we had (RTH, Name) listed as living in your household. Is (Name) living in your household now?  
[If "NO", GO TO FU/HU AND USE F3 TO SELECT]

**UPDATE FU/HU**  
Is there anyone else living there now that I did not mention, including any newborn children?

**HOUSEHOLDER**  
John Martin  
[GO TO HH AND TYPE "YES" FOR NAMED PERSON(S)]

<table>
<thead>
<tr>
<th>RTH</th>
<th>FU/HU</th>
<th>FIRST NAME</th>
<th>LAST NAME</th>
<th>HH</th>
<th>S.S 92AGE</th>
<th>PN</th>
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</tbody>
</table>

LIST COMPLETE  
MORE PEOPLE

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64
This is how the FAMILY LISTING screen looks if it was not needed to list last year’s FU Members, but is needed to list all of the current FU/HU Members. In order to invoke this blank screen, highlight MORE PEOPLE and press [Enter] on the previous FAMILY LISTING screen. It is very important that all persons are listed sequentially on consecutive screens. Data entered on a FAMILY LISTING screen following one that is blank will not be recorded.

These two screens are an example of a Family Listing once it’s been fully updated. Using the arrow keys, highlight LIST COMPLETE on the final FAMILY LISTING screen and press [Enter].
**CONSISTENCY CHECK 3**

**IWER:** THE FU MUST HAVE ONE HEAD OR ONE NEW HEAD.

USE [F3] TO CORRECT RTH CODE

<table>
<thead>
<tr>
<th>FIRST NAME</th>
<th>LAST NAME</th>
<th>RTH</th>
<th>FU/HU</th>
</tr>
</thead>
<tbody>
<tr>
<td>EPHNYA</td>
<td>RHOSTLE</td>
<td>WIFE</td>
<td>FU</td>
</tr>
<tr>
<td>Celia</td>
<td>Martin</td>
<td>SISTER</td>
<td>FU M/I</td>
</tr>
<tr>
<td>John</td>
<td>Martin</td>
<td>BROTHER-IN-LAW</td>
<td>FU M/I</td>
</tr>
</tbody>
</table>

CONTINUE

**CONSISTENCY CHECK 3**

**IWER:** THE FU MUST HAVE ONE HEAD OR ONE NEW HEAD.

USE [F3] TO CORRECT RTH CODE

<table>
<thead>
<tr>
<th>FIRST NAME</th>
<th>LAST NAME</th>
<th>RTH</th>
<th>FU/HU</th>
</tr>
</thead>
<tbody>
<tr>
<td>EPHNYA</td>
<td>RHOSTLE</td>
<td>NEW FEMALE HEAD</td>
<td>FU</td>
</tr>
<tr>
<td>Celia</td>
<td>Martin</td>
<td>SISTER</td>
<td>FU M/I</td>
</tr>
<tr>
<td>John</td>
<td>Martin</td>
<td>BROTHER-IN-LAW</td>
<td>FU M/I</td>
</tr>
</tbody>
</table>

CONTINUE

**CONSISTENCY CHECK 11: HU MEMBERS**

**IWER:** PERSON(S) LISTED SHOULD BE FU MEMBER(S) EXCEPT FOR THE FOLLOWING REASONS.

1. HAS OWN COVERSHEET(HU/CS)
2. LIVING WITH THIS FU ONLY TEMPORARILY
3. DOES NOT SHARE EXPENSES WITH THIS FU(ROOMMATE)
4. REFUSED TO BE INCLUDED IN THE IW

USE F3 TO SELECT REASON WHY NOT FU MEMBER: SELECT ALL THAT APPLY.
USE F3 TO CORRECT FU/HU CODE IF FU MEMBER: SELECT FU M/I.

<table>
<thead>
<tr>
<th>RTH</th>
<th>FIRST NAME</th>
<th>FU/HU</th>
<th>REASON(S)</th>
</tr>
</thead>
<tbody>
<tr>
<td>GRANDMOTHER</td>
<td>Ruth</td>
<td>HU</td>
<td></td>
</tr>
</tbody>
</table>

CONTINUE
This is an example of a CONSISTENCY CHECK. These checks are included as tools to help you adhere to PSID rules regarding FU/HU composition. In this situation, last year's Head died and no one was designated as New Head of the current FU. To correct this, use [F3] to invoke the pop-up menu containing the RTH codes.

The second screen shows that a New Head has been properly selected.

Whenever an individual who should be considered an FU Member by PSID rules is given as FU/HU code of HU on the FAMILY LISTING screen, this CONSISTENCY CHECK will appear. You must either change the FU/HU code for this individual, or you must select at least one of the REASON codes to indicate why this individual is not included in the FU.

With the cursor in the FU/HU column, use [F3] to change the FU/HU code to FU M/I if none of the reasons listed are applicable.

With the cursor in the REASON column, use [F3] to select the appropriate reason(s) if the individual really shouldn't be included in the FU. By toggling, you may select as many reasons as are applicable, but note that only the first code selected will appear on the screen. If you select code 1. HAS OWN COVERSHEET(HU/CS), you will be prompted by another CONSISTENCY CHECK to correct the FU/HU code to HU/CS, if you have not already done so.
CONSISTENCY CHECK 12: HU MEMBERS WITH THEIR OWN COVERSHEET

[IF YOU ENTER SAMPLE ID(S), IT IS NOT NECESSARY TO ENTER A SAMPLE ID MORE THAN ONCE IF TWO OR MORE PERSONS LISTED ARE LIVING IN THE SAME FU.]

<table>
<thead>
<tr>
<th>FIRST NAME</th>
<th>LAST NAME</th>
<th>RTH</th>
<th>FU/HU</th>
<th>SAMPLE ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sarah</td>
<td>Johnson</td>
<td>DAUGHTER</td>
<td>HU/CS</td>
<td></td>
</tr>
<tr>
<td>Miles</td>
<td>Johnson</td>
<td>GRANDSON</td>
<td>HU/CS</td>
<td></td>
</tr>
</tbody>
</table>

CONTINUE

BIRTH DATES

Now I would like to ask some birth date information. What is (your/RTH/Name’s) complete birth date? [IF OK BIRTH DATE PROBE: How old is the (RTH/Name)?]

<table>
<thead>
<tr>
<th>RTH</th>
<th>FIRST NAME</th>
<th>MONTH</th>
<th>DAY</th>
<th>YEAR</th>
<th>93 AGE</th>
<th>FU/HU</th>
</tr>
</thead>
<tbody>
<tr>
<td>NEW FEMALE HEAD</td>
<td>EPHNYA</td>
<td>NOV</td>
<td>00</td>
<td>1951</td>
<td>40</td>
<td>FU</td>
</tr>
<tr>
<td>SON</td>
<td>KEVIN</td>
<td>NOV</td>
<td>00</td>
<td>1970</td>
<td>21</td>
<td>M/O</td>
</tr>
<tr>
<td>DAUGHTER</td>
<td>DANIELLE</td>
<td>JUN</td>
<td>00</td>
<td>1974</td>
<td>17</td>
<td>M/O</td>
</tr>
<tr>
<td>SISTER</td>
<td>Celia</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>FU M/I</td>
</tr>
<tr>
<td>BROTHER-IN-LAW</td>
<td>John</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>FU M/I</td>
</tr>
<tr>
<td>DAUGHTER</td>
<td>Sarah</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>HU/CS</td>
</tr>
<tr>
<td>GRANDSON</td>
<td>Miles</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>HU/CS</td>
</tr>
<tr>
<td>GRANDMOTHER</td>
<td>Ruth</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>HU</td>
</tr>
</tbody>
</table>

CONTINUE

BIRTH DATES

Now I would like to ask some birth date information. What is (your/RTH/Name’s) complete birth date? [IF OK BIRTH DATE PROBE: How old is the (RTH/Name)?]

<table>
<thead>
<tr>
<th>RTH</th>
<th>FIRST NAME</th>
<th>MONTH</th>
<th>DAY</th>
<th>YEAR</th>
<th>93 AGE</th>
<th>FU/HU</th>
</tr>
</thead>
<tbody>
<tr>
<td>NEW FEMALE HEAD</td>
<td>EPHNYA</td>
<td>NOV</td>
<td>23</td>
<td>1951</td>
<td>40</td>
<td>FU</td>
</tr>
<tr>
<td>SON</td>
<td>KEVIN</td>
<td>NOV</td>
<td>16</td>
<td>1970</td>
<td>21</td>
<td>M/O</td>
</tr>
<tr>
<td>DAUGHTER</td>
<td>DANIELLE</td>
<td>JUN</td>
<td>04</td>
<td>1977</td>
<td>15</td>
<td>M/O</td>
</tr>
<tr>
<td>SISTER</td>
<td>Celia</td>
<td>JAN</td>
<td>25</td>
<td>1945</td>
<td>48</td>
<td>FU M/I</td>
</tr>
<tr>
<td>BROTHER-IN-LAW</td>
<td>John</td>
<td>DK</td>
<td>DK</td>
<td>DK</td>
<td>50</td>
<td>FU M/I</td>
</tr>
<tr>
<td>DAUGHTER</td>
<td>Sarah</td>
<td>MAR</td>
<td>09</td>
<td>1969</td>
<td></td>
<td>HU/CS</td>
</tr>
<tr>
<td>GRANDSON</td>
<td>Miles</td>
<td>AUG</td>
<td>17</td>
<td>1992</td>
<td></td>
<td>HU/CS</td>
</tr>
<tr>
<td>GRANDMOTHER</td>
<td>Ruth</td>
<td>FEB</td>
<td>01</td>
<td>DK</td>
<td>80</td>
<td>HU</td>
</tr>
</tbody>
</table>

CONTINUE
If individuals on the FAMILY LISTING screen are listed with the FU/HU code of HU/CS, this screen will appear. You must enter the Sample ID from the Sample Family sheet in the Family Folder (inside back cover) of all persons listed on this screen. If more than one person has the same Sample ID, you need enter that Sample ID only once. Please remember to use the hyphen when typing the Sample ID.

We are interested in obtaining complete birth dates for all persons on the FAMILY LISTING. Ask the day an individual was born, in addition to the month and year. If you cannot obtain the complete birth date (month, day, and year), then ask for the individual’s age (you don’t need to ask age if you obtain a complete birth date).

In the MONTH column, use [F3] to select the month from the pop-up menu. In the YEAR column, please enter all four digits. When entering data directly onto the screen, type DK when the Respondent doesn’t know the answer.

This is an example of how a completed BIRTH DATE screen might look when all birth date and age information is collected. Again, our preference is to obtain the complete birth date, but when that is not known, ask the individual’s age. It is unnecessary to obtain both.
### DECEASED FU MEMBER(S)

What was the age at death of (RTH/Name)?

<table>
<thead>
<tr>
<th>RTH</th>
<th>FIRST NAME</th>
<th>MONTH</th>
<th>YEAR</th>
<th>AGE/DEATH</th>
<th>FU/HU</th>
</tr>
</thead>
<tbody>
<tr>
<td>MALE HEAD</td>
<td>DAVID P.</td>
<td>FEB</td>
<td>1951</td>
<td>DIED</td>
<td></td>
</tr>
</tbody>
</table>

CONTINUE

### MARITAL STATUS

(Are you/Is RTH/Name) married, widowed, divorced, separated or never married? USE F3 TO SELECT MARITAL STATUS.

ASK ONLY IF MARRIED: What is the name of (your/RTH/Name's)(husband/wife)?

[ACCEPT ANY NAME -- DO NOT PROBE]

<table>
<thead>
<tr>
<th>RTH</th>
<th>FIRST NAME</th>
<th>MARITAL STATUS</th>
<th>SPOUSE'S NAME</th>
</tr>
</thead>
<tbody>
<tr>
<td>NEW FEMALE HEAD</td>
<td>EPHNYA</td>
<td>WIDOWED</td>
<td></td>
</tr>
<tr>
<td>SISTER</td>
<td>Celia</td>
<td>MARRIED</td>
<td>John</td>
</tr>
<tr>
<td>BROTHER-IN-LAW</td>
<td>John</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

CONTINUE

### M/I DATE

When did (RTH/Name) move into this household?

IWER: YEAR M/I IS 2 DIGITS AND DK YEAR IS 99.

<table>
<thead>
<tr>
<th>RTH</th>
<th>FIRST NAME</th>
<th>MONTH M/I</th>
<th>YEAR M/I</th>
</tr>
</thead>
<tbody>
<tr>
<td>SISTER</td>
<td>Celia</td>
<td>JAN</td>
<td>93</td>
</tr>
<tr>
<td>BROTHER-IN-LAW</td>
<td>John</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

CONTINUE

### M/O DATE

When did (RTH/Name) move out/die?

IWER: YEAR M/O IS 2 DIGITS AND DK YEAR IS 99.

<table>
<thead>
<tr>
<th>RTH</th>
<th>FIRST NAME</th>
<th>FU/HU</th>
<th>MONTH M/O</th>
<th>YEAR M/O</th>
</tr>
</thead>
<tbody>
<tr>
<td>MALE HEAD</td>
<td>DAVID P.</td>
<td>DIED</td>
<td>OCT</td>
<td>92</td>
</tr>
<tr>
<td>SON</td>
<td>KEVIN</td>
<td>M/O</td>
<td>JUN</td>
<td>92</td>
</tr>
<tr>
<td>DAUGHTER</td>
<td>DANIELLE</td>
<td>M/O</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

CONTINUE
Birth dates for deceased FU Members may need special handling, so they get a screen all their own. It is not necessary to collect the complete birth date. We are interested in obtaining the age at the time of death. Highlight CONTINUE and press [Enter] to go on to the next screen.

This screen collects the marital status of everyone currently living in the FU (FU/HU codes of FU and FU M/I) who is age 12 or older. In the MARITAL STATUS column, use [F3] to invoke the pop-up menu with the codes for MARITAL STATUS. Ask for the spouse's name only if the individual's marital status is MARRIED. You may need to correct RTH (move cursor to RTH column and press [F3]) if you discover that certain FU members are not actually married to one another.

All movers in to the FU (FU/HU code of FU M/I) will be listed on this screen. In the MONTH M/I column, use [F3] to invoke the pop-up menu of months. In the YEAR M/I column, you can type the two digits of the year directly onto the screen. If the Respondent doesn't know the year, enter 99 rather than DK.

The move out dates for all persons moving out of the FU (FU/HU code of M/O, DIED, or *INST*) are collected on this screen. In the MONTH M/O column, use [F3] to select the month. Enter the two digits of the year directly onto the screen.
**SPLITOFFS**

Are any of these persons (RTH, Name) now living together in the same household?

**IF YES, GIVE ALL PERSONS LIVING TOGETHER THE SAME HOUSEHOLD #. EACH SPLITOFF MUST HAVE A HOUSEHOLD # STARTING WITH 1. SELECT ONE SPLITOFF RESPONDENT FOR EACH HOUSEHOLD. USE [F3] TO CHANGE SPLITOFF RESPONDENT TO "NO".**

<table>
<thead>
<tr>
<th>RTH</th>
<th>FIRST NAME</th>
<th>FU/HU</th>
<th>AGE</th>
<th>HOUSEHOLD#</th>
<th>SPLITOFF RESPONDENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>SON</td>
<td>KEVIN</td>
<td>M/O</td>
<td>22</td>
<td>1</td>
<td>YES</td>
</tr>
<tr>
<td>DAUGHTER</td>
<td>DANIELLE</td>
<td>M/O</td>
<td>15</td>
<td>2</td>
<td>YES</td>
</tr>
</tbody>
</table>

CONTINUE

**ADDRESS UPDATE FOR MOVER OUT**

Can you give me KEVIN RHOSTLE'S address and phone number?
What is his street address?

<table>
<thead>
<tr>
<th>NUMBER AND STREET</th>
<th>1234 Ocean Valley</th>
</tr>
</thead>
<tbody>
<tr>
<td>(APT/SUITE NO.)</td>
<td>Apt 2B</td>
</tr>
<tr>
<td>CITY</td>
<td>San Diego</td>
</tr>
<tr>
<td>ZIP CODE</td>
<td>92130</td>
</tr>
<tr>
<td>AREA CODE</td>
<td>PHONE NUMBER</td>
</tr>
<tr>
<td>COMMENT</td>
<td>He's in the Marines--just moved into this apartment, then sent to Somalia</td>
</tr>
</tbody>
</table>

**Is he married?**

1 YES
5 NO

**Has he set up his own household?**

1 OWN HOUSEHOLD
2 OTHER PERSON'S HOUSEHOLD
3 INSTITUTION
This SPLITOFF screen is designed so that only one address is collected and only one Splitoff interview is conducted for those persons who move out together. All persons moving to one household should be assigned the same HOUSEHOLD#. All persons moving to separate households should receive unique numbers. The HOUSEHOLD# should be assigned sequentially beginning with 1.

If more than one person is moving to the same household, only one of those persons should be designated as the SPLITOFF RESPONDENT and have a SPLITOFF RESPONDENT code of YES. Use [F3] to change this to NO for everyone else with the same HOUSEHOLD#. All individuals moving to separate households will have SPLITOFF RESPONDENT codes of YES.

This screen collects the addresses of former FU Members who have moved out, as well as those persons now considered institutionals. The label at the top of the screen indicates whether this is an address update for a mover out or for an institutional, and, if institutional, what kind of institution. The name of the individual for whom we are collecting the address information is filled in the question text.

If the Respondent does not know the whereabouts of this person, please record this and any other clarifying information in the COMMENT field. If you need more space, use [F2].

This information is collected for all movers out who are at least 16 years of age. If the Splitoff is married, a follow-up screen asks for the spouse's name. This information will be displayed on the paper Splitoff Coversheet to help in tracking the R.

This question gives us a chance to identify institutionals in the event this information was not obtained while the Family Listing was being updated, as was the case in this example situation.
[IWER: KEVIN RHOSTLE HAS MOVED TO AN INSTITUTION]
USE [F3] AND SELECT THE TYPE OF INSTITUTION

FIRST NAME   FU/HU
KEVIN        M/O
CONTINUE

[IWER: KEVIN RHOSTLE HAS MOVED TO AN INSTITUTION]
USE [F3] AND SELECT THE TYPE OF INSTITUTION

FIRST NAME   FU/HU
KEVIN        *MIL*
CONTINUE

PERSON LIVING WITH
Who is DANIELLE living with now?
FIRST/MI: Isaac       LAST NAME: Rhostle
What is (his/her) relationship to DANIELLE?
RELATIONSHIP TO DANIELLE: Uncle

[IWER: DANIELLE IS LIVING WITH Isaac Rhostle.]
Can you give me DANIELLE’s new address, I mean the address of the person with whom DANIELLE is living with now.
What is her/his street number?

NUMBER AND STREET
(APT/SUITE NO.)

CITY
ZIP CODE ---
AREA CODE PHONE NUMBER EXT.
COMMENT

74
Because we selected Institution at the previous question, this follow-up screen asks to which type of institution this individual has moved. With your cursor in the FU/HU column, use [F3] to select the correct institution. Once you have changed the FU/HU code, highlight CONTINUE and press [Enter] to go on to the next screen.

This screen will appear if a Splitoff individual is under 16 years of age. The PSID’s root assumption is that, for the most part, persons under 16 don’t leave home to set up their own households. Information collected on this screen will be printed on the paper Splitoff Coversheet to aid in tracking.

This screen will also appear if the Splitoff is 16 years of age or older, but has not set up her/his own household.

This is a standard ADDRESS UPDATE screen. It displays the name of the person with whom the Splitoff is living (which was collected on the previous screen) and asks for her/his address.
WHO IS YOUR RESPONDENT?

1 HEAD
2 WIFE
3 "WIFE"
4 FU MEMBER, BUT NOT HEAD/WIFE/"WIFE" (SPECIFY)
7 PROXY R, NOT MEMBER OF THIS FU (SPECIFY)
It is imperative that you correctly identify the Respondent because future question fills and sequences depend on this! If the Respondent is not the Head or Wife/"Wife," enter the appropriate code (4 or 7), then use the COMMENT box to specify exactly the Respondent's name and relationship to the Head.

Please note that the selections on this screen are customized based on the updated FAMILY LISTING screen—for example, if there is no Wife or "Wife" is in the FU, that option will not even be available.
**A4.** Do you live in a one-family house, a two-family house, an apartment, a mobile home, or what?

[IF R ANSWERS "CONDO", PROBE FOR TYPE OF DWELLING]

1. ONE-FAMILY
2. TWO-FAMILY, DUPLEX
3. APARTMENT, PROJECT
4. MOBILE HOME, TRAILER
5. ROW HOUSE, TOWN HOUSE
6. OTHER(SPECIFY)

**A6.** Do you live in a retirement community, senior citizens' housing complex, nursing home, home for aged, or adult foster care facility?

1. YES
5. NO

**A7.** Which kind is that?

1. RETIREMENT COMMUNITY
2. SENIOR CITIZENS' HOUSING COMPLEX
3. NURSING HOME
4. HOME FOR AGED
5. ADULT FOSTER CARE FACILITY

**A8.** We are interested in personal services you might get in addition to housing. At your retirement community, do you get medication or injections from a registered nurse?

1. YES
5. NO

**A9.** (At your retirement community, do you get) meals?

1. YES
5. NO

**A10.** (At your retirement community, do you get) maid service or cleaning?

1. YES
5. NO
Part 2: Section A--Housing

A4
Note the separate code for ROW HOUSE; TOWN HOUSE. Also, do not accept "CONDOMINIUM" or "CONDO" as an answer. "Condominium" is a form of ownership, not a type of dwelling. There are condominium apartments, condominium town houses, etc. Re-ask the question with the emphasis on type of structure.

A6-7
The older people’s housing and services question sequence is asked if either Head or Wife/"Wife" is age 55 or older. A retirement community or a senior citizen's housing complex is one that generally has some type of formal requirement (usually age, but also minimum health requirements) for residence. Do not consider a person to be residing in a retirement community just because the majority of the people in the city, neighborhood, building, or complex are retired.

The distinction between a retirement community and a senior citizens’ housing complex is not always clear. The retirement community generally has full-time nursing care available in a separate area or facility, common areas for dining and recreation, and many of the services listed in A8-A10.

Nursing homes are primarily for people who need constant nursing supervision or are incapable of living independently.

A8-10
The service does not have to be used by the person to answer "Yes" for these items. It does not have to be contained within the same building as the one in which they reside, provided it is within the same community or complex. For example, if the response is "There’s a dining hall in the next building", consider this a "Yes" response.
A15. How is your home heated -- with gas, electricity, oil or what? [ENTER ALL THAT APPLY] (Any others?)

01, GAS
02, ELECTRICITY
03, OIL
04, WOOD
05, COAL
06, SOLAR
10, BOTTLED GAS, PROPANE
11, KEROSENE
97, OTHER(SPECIFY)

A16. How many rooms do you have for your family not counting bathrooms?

NUMBER OF ROOMS FOR FU ONLY

00. FU SHARES A 1-ROOM HU WITH NON-FU PERSONS
01-30. ACTUAL NUMBER OF ROOMS
98. FINAL DK [AFTER PROBE]
99. REFUSAL

A17. There are government programs that give money to people to help them pay for heating their homes. Did you receive help with heating bills from any government program last winter (1992-1993)?

1 YES
5 NO

A18. About how much did that amount to altogether?

IWER: PROBE QUALIFIED ANSWER, RANGE, OR DK:
What's your best estimate?

HOME HEATING ASSISTANCE
1 - 9997 ACTUAL DOLLAR AMOUNT
9998 $9,998 DOLLARS OR MORE
9999 FINAL DK [AFTER PROBE] OR REFUSAL
We want the fuel used—answers such as "hot air" or "steam heat" are inadequate. What fuel heats the steam or air? If more than one fuel is used, select all kinds used.

Include only whole rooms (e.g., kitchens, bedrooms, dining rooms, living rooms, permanently enclosed sun porches, finished basement/attic rooms, or other rooms suitable for living purposes). Exclude rooms used only by non-FU persons. Please use an [F2] comment to note that you did so. If this FU is living with another FU, tell us how many rooms are for the exclusive use of this FU (e.g., their own bedrooms) and make an [F2] note of this number.

If some rooms are used for business only, tell us how many and exclude them from the total at A16.

If you are interviewing a Respondent in Spanish, be sure that she/he understands that cuartos includes a living room (sala), kitchen (cocina), dining room (comedor), etc., not just bedrooms (habitaciones).

These programs may be provided by state or local government agencies. Get both amounts paid to utility companies on the FU’s behalf and money given to any FU member by the government to help pay for heat. If R doesn’t know the exact amount, get an estimate. If R gives an amount and frequency with which they received it, such as "$20 per month for three months," probe for a total altogether using /RR/. Do not include savings resulting from Senior Citizens' rates, rebates, or help form non-government agencies (church, Salvation Army).
A19. Do you or anyone else in your family living there own the home, pay rent, or what?

IWER: REFERS TO MEMBERS OF THIS FU ONLY.

1 ANY FU MEMBER OWNS OR IS BUYING (FULLY OR JOINTLY)
5 FU PAYS RENT
8 FU NEITHER OWNS NOR RENTS
NOTE: The "you" in this question refers to anyone in the FU.

1. OWNS OR IS BUYING:
   (a) If anyone in the FU OWNS the HU, then we count it as owning/buying. If an HU member who is not in the FU owns, find out what the FU does. They may be renting rooms from the owner, in which case FU PAYS RENT should be selected.
   (b) If anyone in the FU IS BUYING the home by making payments on a mortgage, land contract, or deed of trust, select OWNS OR IS BUYING.
   (c) If the FU both owns and rents (e.g., owns trailer but rents lot, or owns condo but pays monthly fees for services), select OWNS OR IS BUYING.

5. FU PAYS RENT: We want to know only about this FU! If the FU pays an amount which includes room and board or other services, select FU PAYS RENT and try to get separate amount for rent. FUs in nursing homes or other care facilities and people buying into retirement communities may have complicated situations, so get full details and record them in [F2].

8. FU NEITHER OWNS NOR RENTS: These FUs les are:
   (a) janitors, maids, farm laborers, etc., who get living quarters as part of their pay;
   (b) people who live in houses or rooms provided rent-free as a gift from someone;
   (c) military or government employees living in government provided housing;
   (d) families who have sold their houses but have not yet moved at the time of the interview;
   (e) families who pay no rent because a government housing welfare program pays all of the rent—but the dwelling must cost nothing, not just have reduced rent.

Note: Be aware of the importance of the FU. For example, if the interview is taken with a former Splitoff child who has returned to the parental home, the parents and the child are members of two separate family units (FUs). Thus, if the parents own the home and this FU pays them rent, we say this FU PAYS RENT.
A20. Could you tell me what the present value of your house is -- I mean about how much would it bring if you sold it today?

IWER: PROBE QUALIFIED ANSWER, RANGE, OR DK:
What's your best estimate?

HOUSE VALUE
1 - 9999997 ACTUAL DOLLAR AMOUNT
9999998 $9,999,998 DOLLARS OR MORE
9999999 FINAL DK [AFTER PROBE] OR REFUSAL

A21. About how much are your total yearly property taxes, including city, county, and school taxes?

IWER: PROBE QUALIFIED ANSWER, RANGE, OR DK:
What's your best estimate?

TOTAL ANNUAL PROPERTY TAX
0 NO PROPERTY TAX; EXEMPT FROM TAX
1 - 99997 ACTUAL DOLLAR AMOUNT
99998 $99,998 DOLLARS OR MORE
99999 FINAL DK [AFTER PROBE] OR REFUSAL

A22. How much is your total yearly homeowner's insurance premium?

IWER: PROBE QUALIFIED ANSWER, RANGE, OR DK:
What's your best estimate?

TOTAL ANNUAL HOMEOWNER'S INSURANCE
0 DO NOT HAVE HOMEOWNER'S INSURANCE
1 - 9997 ACTUAL DOLLAR AMOUNT
9998 $9,998 DOLLARS OR MORE
9999 FINAL DK [AFTER PROBE] OR REFUSAL

A23. Do you have a mortgage on this property?

1 YES, MORTGAGE, LAND CONTRACT, HOME EQUITY LOAN, ETC.
5 NO

A24. About how much is the remaining principal on this mortgage?

IWER: PROBE QUALIFIED ANSWER, RANGE, OR DK:
What's your best estimate?

REMAINING PRINCIPAL
1 - 9999997 ACTUAL DOLLAR AMOUNT
9999998 $9,999,998 DOLLARS OR MORE
9999999 FINAL DK [AFTER PROBE] OR REFUSAL
This question sequence is asked of all FUs that "own or are buying" their home. We want an estimate of what the sale price would be if the house were sold today, but not under forced-sale conditions. Include the value of the land/lot on which the home sits (if this is also owned by the FU; it usually is).

For farmers or people with a home business, we need to separate the value of the living quarters from the value of the farm/business. For farmers, this means you should include the value of the lot/yard the home sits on, but not the buildings, equipment, or farmed land. For home businesses, ask R to exclude the value of the business property. If R cannot separate these amounts, make an [F2] comment to that effect.

We want the FU's tax liability, whether the taxes have been paid or not. Basically, we are asking, "What do the taxes run on your place?" If taxes are included in mortgage or house payments, R may not know the exact answer. An approximate figure is acceptable. We want taxes paid on the FU's home and lot only, not on other properties owned.

We want only the cost of insurance on the FU's home.

Mortgages, land contracts, deeds of trust, and home equity loans all get a YES answer here. However, include only loans of money secured by the home (i.e., borrowed against its equity). If in doubt, collect all details in an [F2] comment.

Get the amount still owed on the principal (i.e., how much of the original amount borrowed is still owed). The monthly payment amount times the number of remaining payments does not give us the principal since payments include interest, and sometimes property tax and insurance. For farmers and others whose living quarters and business property are mortgaged together, we'd like the portion of the principal that is just for the house (i.e., living quarters), excluding the farmland, rooms or buildings, equipment, etc. used for the farm or business. We realize this is difficult for some Rs, but ask them to estimate the fraction or percentage of the total, record the total in an [F2] comment and record the estimated fraction as the response.
A31. About how much rent do you pay a month?

IWER: PROBE QUALIFIED ANSWER, RANGE, OR DK:
What's your best estimate?

**AMOUNT:**

**PER:** MONTH
   TWO WEEKS
   WEEK
   OTHER [USE F2 TO RECORD]
   DK
   RF

---

A32. Is this house rented fully furnished?

1  YES
5  NO

---

A34. Is this house in a public housing project, that is, is it owned by a local housing authority or other public agency?

1  YES
5  NO

---

A35. Are you paying lower rent because the Federal, State, or local government is paying part of the cost? [COST OF RENT]

1  YES
5  NO
This question sequence is asked of all FUs that "rent" their home. If rent is paid irregularly on a "pay as I can" basis, obtain R’s best estimate of total annual amount paid in rent (select OTHER and use [F2] to record). For whatever amount given, be sure you select the appropriate time period. If rent is free, then this "FU NEITHER OWNS NOR RENTS." Use [F9] to go back to A19 and change that response.

We mean completely furnished—chairs, tables, beds, etc.—not just stove and refrigerator. "Completely furnished" need not include bed linens, dishes, etc. If the HU is only partially furnished—a table or a couple of chairs—the answer is NO.

We want to know if this dwelling unit is part of a low-income housing project or subdivision where the local, state, or federal government owns or subsidizes the properties to keep housing costs down. Do not include "student housing" (i.e., dormitory or family housing owned by a state university or college). Our focus here is government housing assistance for low income families.

"Lower rent" here means a government program is paying only part of the rent, either to the landlord or to the family. We just want government rent assistance, not that from church or charity. Government help with heating costs only doesn’t go here, it belongs in A18. If the government helps with rent and rent includes heat, select YES here.
A36. How is that?

01 LIVE-IN HOUSEKEEPER
02 FARM OR RANCH LABORER
03 MILITARY OR GOVT HOUSING/APT MANAGER/OTHER JOB
04 FREE HSG IN RELV/FRIEND'S HOME/HOUSING PROJECT
05 SOLD HOME, BUT STILL LIVING THERE
06 WILL INHERIT/ESTATE BEING SETTLED
07 TEMPORARY HOUSING (HOME CONSTRUCTION/REPAIR,Moving)
08 PRISON/JAIL (SINGLE PERSON FU)
97 OTHER(SPECIFY)

A37. How much would it rent for if it were rented?

IWER: PROBE QUALIFIED ANSWER, RANGE, OR DK:
What's your best estimate?

AMOUNT:

PER: MONTH
TWO WEEKS
WEEK
OTHER [USE F2 TO RECORD]

A39. Are you paying no rent because the Federal, State, or local government is paying all of it?

1 YES
5 NO

A40. Do you have air conditioning?

1 YES
5 NO
This question sequence is asked of FUs where the "FU neither owns nor rents." These FUs are usually in one of four situations. Use 97 OTHER(SPECIFY) for all situations that do not clearly fit one of the following:

(a) Housing is part of compensation for their work. [Codes 1-3]

(b) They live with Non-FU members (i.e. friends and relatives) who OWN or RENT and let this FU stay there for free, or they live in a government housing project.  
[Code 4]

(c) Ownership of the home is changing or the FU is living there only temporarily.  
[Codes 5-7]

(d) A single person FU is in prison or jail and being interviewed as an institutionalized FU. [Code 8]

Listen very carefully to R’s answer and keep the idea of the FU in mind. If you discover that R lives with someone else (relative or friend) who owns the house and is an FU Member, you should go back to A19 and change the response to FU MEMBER OWNS OR IS BUYING. If the person with whom R lives pays rent and is an FU Member, go back to A19 and change the response to FU PAYS RENT.

The amount here should be rent for a comparable room, house, or apartment, including whatever furnishings and utilities the landlord provides. Military and government employees living in government-provided housing often give the amount of their housing allowance in answer to this question. We do not want that. Ask what comparable non government housing would rent for in the R’s area.

Make sure that the FU pays no rent because a government housing program pays it all. If this FU is in prison or jail, R may think the answer here is YES, since the "Federal, State, or local government is paying all of it". Sorry, we are after government housing assistance here. A39 is NO for these people. Similarly, exclude "student housing," as at A34 above.

We accept any kind of central or room air conditioners powered by conventional means. We are interested in whether utilities expenses include cost of air conditioning, so if R explicitly tells you they have it but never use it, the answer here is NO. Likewise, if the "air conditioning" is by unconventional means and requires no power (e.g., certain kinds of "swamp cooler", evaporation), A40 is also NO.
A45. Do you think you might move in the next couple of years?
1 YES, MIGHT OR MAYBE
5 NO

A46. Would you say you definitely will move, probably will move, or are you more uncertain?
1 DEFINITELY
2 PROBABLY
3 MORE UNCERTAIN

A47. Why might you move?
[ENTER ALL THAT APPLY] (Any others?)
1 TO TAKE ANOTHER JOB/STOPPED GOING TO SCHOOL
2 TO LIVE NEARER TO WORK
3 MORE SPACE/BETTER PLACE
4 LESS SPACE/RENT (OTHER EXPENSE)/UPKEEP
5 OWN A HOME/TO GET PLACE OF MY OWN/TO GET MARRIED
6 BETTER NEIGHBORHOOD/CLOSER TO FAMILY/FRIENDS
7 OUTSIDE EVENTS (EVICTED/DIVORCED/JOB TRANSFER)
8 OTHER(SPECIFY)
9 DK, REFUSAL
This question may sometimes sound awkward to the R, since it refers only to the Head (and only his name is filled if the R is his Wife/"Wife"). It's true, though—we are only interested in Head's plans.

It is very important to us to know if plans to move are definite or vague. We have tried to include all of the most common answers in the response categories for why R might move; please take a minute to familiarize yourself with the different choices. If R’s response doesn’t seem to fit any of the choices, select OTHER (SPECIFY) and record R’s response verbatim in the comment box.

If R gives more than one reason for a move, select all responses that apply.
B1. We would like to know about what you do --
are you working now, looking for work, retired, 
keeping house, a student, or what?

[ENTER AS MANY AS APPLY]

1, WORKING NOW
2, ONLY TEMPORARILY LAID OFF, SICK OR MATERNITY LEAVE
3, LOOKING FOR WORK, UNEMPLOYED
4, RETIRED
5, DISABLED, PERMANENTLY OR TEMPORARILY
6, KEEPING HOUSE
7, STUDENT
8, OTHER (SPECIFY)
9, REFUSAL (SPECIFY)
Part 3: Sections B-E—Employment of Head and Wife/"Wife"

Please note: Sections B&C apply to the current Head of the FU and Sections D&E apply to the Wife/"Wife," but the two sets of sections are parallel. We will not show all of the questions from both.

B1

It is crucial that you get an accurate reply to B1 since this will determine whether you ask Section B or skip to Section C.

CODE 1 WORKING NOW: Head has an employer (or is self-employed) and is currently working (i.e. Head worked in the last week). Includes those temporarily at home because they are sick (not on leave), on vacation or sabbatical.

CODE 2 ONLY TEMPORARILY LAID OFF: Head is employed (but off temporarily) and expects to return to their job in the near future. For example: a construction worker off because of bad weather; a factory worker who has been temporarily laid off or is on strike; a Female Head on official maternity leave, a self-employed businessperson closed for repairs.

CODE 3 LOOKING FOR WORK, UNEMPLOYED: Head is not working now and does not have a job to which he/she expects to return. He/She is now actively seeking one. Some examples: permanently laid-off factory workers; people who have lost their jobs because of illness, injury or disability.

CODE 4-8 NOT WORKING/NOT LOOKING: Amy mention these codes even though follow-up questions reveal that they are working now also. Examples are full-time students without jobs; homemakers; women who quit work (rather than took maternity leave) to have a baby; retired people.

You may select as many choices as the Respondent mentions, in the same order that they are mentioned. If the responses include at least one choice from either Code 1 or Code 2, you will continue with Section B. If the responses do not include either Code 1 or Code 2, you will ask a follow-up question: "Are you (HEAD) doing any work for money now at all?" If the answer is YES, you will continue with Section B; if the answer is NO, you skip to Section C.
B&D4. On your main job, are you self-employed, are you employed by someone else, or what?

1 SOMEONE ELSE ONLY
2 BOTH SOMEONE ELSE AND SELF
3 SELF-EMPLOYED ONLY

B&D5. Is that an unincorporated business or a corporation?

USE [F2] FOR OTHER OR COMMENT

1 UNINCORPORATED
2 CORPORATION

B&D7. Is your current job covered by a union contract?

1 YES
5 NO

B&D8. Do you belong to that labor union?

1 YES
5 NO
B&D4

Be careful with the following situations and record as many details as possible in an [F2] comment:

Farmers/farm workers and ranchers/ranch workers who work for a larger operation are not self-employed. They’re employed by someone else. Incorporated family farm owners, however, are SELF-EMPLOYED or BOTH SOMEONE ELSE AND SELF-employed.

Professional people, such as lawyers, doctors, and engineers who are employees of a corporation of which they are also president, are probably not self-employed. Don’t change R’s answer, just ask B5 and give details in an [F2] comment.

Full-time salaried professional people who also have separate private practices or clients should divide these two roles into main and extra jobs, respectively. If they can’t, record them as employed by BOTH SOMEONE ELSE AND SELF and give details in an [F2] comment. Similarly, any other case in which employment can’t be separated by the R should be recorded as BOTH.

B&D5

Many self-employed people and professionals do not consider what they do a “business” and don’t think B5 applies to them. Select UNINCORPORATED and make a comment in [F2]. If R is very clear that some other category applies (e.g., partnership), record it in [F2].

B&D7-8

We are not asking whether Head or Wife/"Wife" belongs to any labor unions, but only the one covering her/his current main job.
B&D9. What is your main occupation?
What sort of work do you do?

B&D9a. What are your most important activities or duties?

INTERVIEWER CHECKPOINT

B&D9a: I build bridges. We use steel to weld the supports.

B&D9a. DOES B&D9 INFO ABOVE DESCRIBE HEAD’S CURRENT OCC AS A FARMER/RANCHER?

1 YES, HEAD’S CURRENT OCC IS FARMER/RANCHER
5 NO, HEAD’S CURRENT OCC IS NOT FARMER/RANCHER

B&D10. What kind of business or industry is that in?
Follow the guidelines below to get complete information on Head's/Wife's/"Wife's" main job and main job duties/activities.

1. Probe for clear, complete answers. We want to be able to distinguish among unskilled workers (such as laborers), semi-skilled workers (such as operators), and skilled workers (such as plumbers or electricians), as well as among various white-collar occupations. You may use focused probes (/PO/) to get the factual information that you need.

2. The type of place at which Head/Wife/"Wife" works is usually insufficient in response to the occupation questions (e.g., if Head "works in a bank," she/he may be the manager, a teller, or a janitor).

3. Job titles at the lower end of the occupational scale are likely to be less descriptive than they are for professionals, so probe for specifics of what Head/Wife/"Wife" does on the job. For example, if someone says "engineer," that may mean Head: (a) designs bridges or airplanes, (b) operates a railroad locomotive, (c) tends an engine at a power plant or (d) shovels coal into a furnace. We need information more specific than "engineer" here, so that distinctions between skilled, semi-skilled, and unskilled workers can be made. If Head is a road construction worker, she or he will be classified as an: (a) foreman, if she or he supervises a road gang; (b) operative, if she or he operates a bulldozer; or (c) laborer, if she or he provides labor only.

4. Examples of specifics necessary at the other end of the occupational scale are: (a) whether a "nurse" is a registered nurse or practical nurse; (b) whether a "teacher" teaches in an elementary school, secondary school, or college, and the type of school or college in which she/he teaches.

5. Particularly unacceptable answers are: factory worker; construction worker; driver (of what?); teacher (type of school, level/grade?); engineer; nurse (RN? LPN?); sailor (officer? enlisted person?); manager/supervisor (what kind of group does Head supervise?); sales (what does Head sell? retail or wholesale?); clerk; mechanic/repair (what does Head repair?); apprentice (to what trade?); inspector (of what?). In most cases one of the probes listed here will elicit sufficient information.

At this screen, you simply determine (from the information you entered at B&D9a), whether Head's occupation is a farmer or rancher. No question is asked of the Respondent.

The type of business or industry is fitted into an industrial code and is sometimes vital in determining which code a particular occupation should have. For instance, a laborer or warehouse worker does different tasks on the job, according to the industry type. We need to know what's done at the company for which Head/Wife/"Wife" works—whether the company manufactures or sells, what product is manufactured or sold, and whether a sales company sells retail or wholesale.

The following list of questions should help you know what probes to use to get codeable information about occupation and industry.
1. When something is constructed, is it: buildings? bridges? highways? etc.


3. If Head/Wife/"Wife" is employed by the government, specify the department: Parks and Recreation, Sanitation, Bureau of Land Management, Department of Labor, etc., and the level: federal, state, or local.


5. Nurses: Registered or licensed practical nurse?

6. If Head/Wife/"Wife" operates a machine, please specify the kind of machine.

7. "Machinist" is a specialized occupation and is not the same as a machine operator. Be aware of this, as many people use the terms interchangeably.

8. School level: specify grade for elementary and secondary teachers, subject if college level, and type of school: vocational? private?

9. Organizations: profit? nonprofit?

10. Foundries (material produced): brass? iron? steel?

11. Canners: specify the kind of food: fish? fruit? vegetables?

12. Babysitter: is the babysitting done in the Respondent's own home or in someone else's home?


16. When Head's/Wife's/"Wife's" main job is in the Armed Forces, try to get the her/his rank and what she/he does. If this is not possible, please try to find out whether the person is or was commissioned, non-commissioned, or enlisted. Keep in mind that civilians are also employed by the Armed Forces.

17. Mining: ask the type of material mined: copper ore? borax? aluminum? gravel? crude oil? tin? petroleum? natural gas? etc. (Mining industries can also have wholesale and retail trade categories.)

18. Oil: ask the R to specify the type of oil business: oil field company (extraction)? oil lease buyers? oil distributor? oil station (retail)? oil royalty dealer? oil storage tanks? etc.

19. Heavy equipment or heavy machinery: farm? construction?


22. If the occupation is manager or supervisor, ask what the job duties of the people Head/Wife/"Wife" supervises or manages are: sales? data processing? etc.
**B&D11.** What is the name of your employer?

**IF NECESSARY:** This information will help us to process employment history data. The name itself will never be released as part of data from the study.

**USE CONFIDENTIALITY HELP SHEET FOR MORE HELP WITH CONFIDENTIALITY**

**CURRENT MAIN JOB EMPLOYER:**

ENTER EMPLOYER NAME TO BE USED FOR LATER REFERENCE. IF NONE IS GIVEN BY R, ENTER SHORT JOB TITLE FROM THE B&D-9-10 INFO BELOW.

**B&D-9-10:** I build bridges. We use steel to weld the supports.

*Bridge construction*

---

**B&D11d.** Suppose someone had the experience and education needed to start working at a job like yours. From that point, how long would it take them to become fully trained and qualified (to do a job like yours)?

[PROBE QUALIFIED ANSWER, RANGE, AND DK: What's your best estimate?]

**TRAINING NEEDED:** YEAR(S)  MONTH(S)  WEEK(S)

[ENTER AMOUNT(S) OR DK, THEN F10 TO FINISH]

---

**B&D12.** (On your main job, Bridges, Unlimited)

are you salaried, paid by the hour, or what?

1. SALARIED
2. PAID BY HOUR
3. SALARY + TIPS
4. HOURLY + TIPS
5. SALARY + COMMISSION
6. HOURLY + COMMISSION
7. OTHER

---

**B&D15.** About how much would you make per hour for those extra hours?

[ENTER ALL THAT APPLY] (Any others?)

1. TIME AND A HALF
2. DOUBLE TIME
3. STRAIGHT TIME, SAME AS REGULAR [PROBE]
4. COMP TIME [PROBE]
5. EXACT AMOUNT GIVEN (SPECIFY)
B&D11 You will be asking employer's name for every employer, main and extra job, that Head/Wife/"Wife" have or had last year. This may elicit concerns about confidentiality from some Rs. Tread softly here, using minimal persuasion only. Use standard procedures for assurance of confidentiality which applies to all survey information and use the [F1] Help feature for further assistance.

Notice the information on Head's/Wife's/"Wife's" occupation and industry displayed at the bottom of the screen for your reference. If the R does not give you an actual employer name, use this information to construct a short job name or title to be used in future fills.

The name field is only 20 characters wide, so, if you need to abbreviate, please use recognizable abbreviations. This name will be used both as a fill throughout this year's interview and as reference for the R next year.

B&D11d For this question, you may enter R's response in any combination of years, months, and weeks. Note that this is "on the job" training—not how much training it would take to get the job.

B&D12 The OTHER category here is for answers that are not SALARY, HOURLY, or combinations of SALARY or HOURLY with TIPS or COMMISSIONS. It includes such things as "piece work," "paid by the job," "per day," or "self-employed." Be careful when "shift differential" is indicated—note whether Head/Wife/"Wife" gets it as part of regular pay (usually works that shift) or only when she/he works overtime into another shift.

B&D15 Select all that R mentions. Use 5. EXACT AMOUNT when R gives you a specific amount. Accept an answer of "straight time," but probe: "By straight time you mean you are paid the same rate for overtime you are for regular hours?" An answer of "comp time" or "compensation time" should also be probed: "Do you mean you receive additional time off instead of overtime pay?" Use OTHER when overtime is paid in some inconsistent or nonstandard way, such as shift differentials.
B&D21. What have you been doing the last four weeks to find another job? (Any others?)

01, Checked with PUBLIC EMPLOYMENT AGENCY
02, Checked with PRIVATE EMPLOYMENT AGENCY
03, Checked with CURRENT EMPLOYER directly
04, Checked with OTHER EMPLOYER directly
05, Checked with FRIENDS OR RELATIVES
06, PLACED OR ANSWERED ADS (probe)
07, OTHER(SPECIFY)
08, NOTHING
98, DK
99, RF

B&D23. How many years' experience do you have altogether with your present employer?

IWER: PROBE QUALIFIED ANSWER, RANGE, OR DK:
What's your best estimate?

EXPERIENCE: YEAR(S) MONTH(S) WEEK(S)
ENTER AMOUNT(S) OR DK, THEN F10 TO FINISH

B&D24/C&E16. [CURRENT MAIN JOB EMPLOYER: Bridges, Unlimited]

In what month and year did you start working for your present employer?
Please give us your most recent start date if you have gone to work for them more than once. [IF NECESSARY: What would be your best estimate? Did you start before 1992?]

JAN  JUL  "winter"
FEB  AUG  "spring"
MAR  SEP  "summer"
APR  OCT  "fall/autumn"
MAY  NOV  DK
JUN  DEC  RF

ENTER THE LAST TWO DIGITS OF ACTUAL YEAR (01 - 93)
19
96 1992 OR 1993, DK WHICH
97 BEFORE 1992, DK EXACT YEAR
98 DK YEAR AT ALL
99 REFUSAL
B&D21

Select all choices that apply, and use OTHER to specify any response that doesn’t fit the given choices.

Note the code 06, PLACED OR ANSWERED ADS, means doing more than just checking or reading ads. If R says, "Looked at newspaper want ads", "checked job ads", etc., probe whether Head/Wife/"Wife" actually placed or answered any ads. If not, do not select this response—use 7 OTHER to record this.

B&D23

By employer, we mean company, firm, or organization, not a specific boss. If the company changed owners, note the change(s) in [F2], and if Head/Wife/"Wife" worked several different times for this same employer, give us the total altogether.

Work History

With questions B&D24-59, we want to account for Head’s/Wife’s/"Wife’s" recent work history and job changes for main jobs. That is, we’re collecting information about both changes in employer and changes in position with the same employer from January of 1992 through today’s date. The question sequences reflect our focus on employers and, in particular, spells of employment during 1992. We have designed the question sequences so that R is to tell us about Head’s/Wife’s/"Wife’s" current (or most recent) main job, then other main jobs held in 1992 in any order.

A quick definition of main vs. extra jobs: very simply, Head/Wife/"Wife" cannot have an extra job unless she/he holds a main job during the same time period. We make this distinction between main and extra jobs throughout and ask you to remind R of this, but in these sequences it’s not as important as a complete account of work with each employer.

B&D24

Both B23 and B24 refer to the present employer. While B23 asks for the total amount of time Head/Wife/"Wife" worked for this employer, B24 asks for the most recent start with this employer (or self-employment).

If R cannot give an exact month, probe for the season.
[START DATE FOR Bridges, Unlimited EMPLOYMENT: JAN 1991]

[B&D26.30..31/C&E18.20..21]  In what month and year did you start working in your present position?

JAN  JUL  "winter"
FEB  AUG  "spring"
MAR  SEP  "summer"
APR  OCT  "fall/autumn"
MAY  NOV  DK
JUN  DEC  RF

ENTER THE LAST TWO DIGITS OF ACTUAL YEAR (01 - 93)

91  92  93  94  95  96  97  98  99

91  1991 OR 1992, DK WHICH
92  BEFORE 1992, DK EXACT YEAR
93  92 DK YEAR AT ALL
94  REFUSAL

[B&D29.34/C&E21.26]  Was that a promotion with higher pay, a major change in your duties but with the same pay, or what?

1  PROMOTION WITH HIGHER PAY
5  MAJOR CHANGE IN DUTIES BUT WITH SAME PAY
7  OTHER(SPECIFY)

B39/C31. In which months during 1992 were you working for Bridges, Unlimited as your main job?

[IWER: USE ARROW KEY TO MOVE CURSOR, [INS] FOR SELECT, [DEL] FOR DELETE]

ALL  JAN  FEB  MAR  APR  MAY  JUN  JUL  AUG  SEP  OCT  NOV  DEC  DK  RF

B40/C32. Did you have any other main-job employer at any time during 1992? If you were self-employed on a main job, count yourself as an employer.

1  YES
5  NO
For Heads/Wives/"Wives" who began their present employment in 1992, we ask the start date of the most recent position change in 1992. We are primarily interested in promotions and lateral transfers at B29, but please record all details R provides about changes in pay, duties, etc. in an [F2] comment. The term "work situation" may be substituted for "position" to make these questions less awkward for self-employed Heads/Wives/"Wives."

Select the months of 1992 in which Head/Wife/"Wife" worked for the present employer as a main job; this is usually the ALL choice at the top of the screen. Include all months in which she/he worked at least one day, but do not include months she/he was not employed at all or was off the entire month on vacation, leave, temporary layoff, sick time, etc. You will gather more details on these periods later in the questionnaire.

Please note that you cannot select DK or REF in combination with any of the months.

After each main job question sequence, you will ask the R whether Head/Wife/"Wife" has any other main jobs during 1992. The questionnaire allows up to 4 separate main jobs, asking the same questions for each and every one.

If there were more than 4 jobs in 1992, you will need to ask the question sequence about the remaining jobs on a paper Work History Supplement. After completing a Supplement, be sure all necessary information is included and put the sheet(s) in the Project Manager Box.
B42a/C34a. IWER CKPT

MONTHS WORKED IN 1992

Pete's Pipes          JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC
self--plumbing       JUL AUG SEP OCT

[CHECK FOR OVERLAP IN ABOVE 2 EMPLOYMENT STRINGS]

1. NO OVERLAP OF EMPLOYMENT STRINGS
2. OVERLAP, ONE MONTH ONLY
3. PARTIAL OVERLAP, 2-11 MONTHS
4. COMPLETE OVERLAP OF ALL MONTHS OF (2nd, 3rd or 4th) STRINGS

B42b/C34b. During JUL/AUG/SEP/OCT, were there weeks when you were employed at both jobs?
B42c/C34c. How many weeks was that?
B42d/C34d. During that time, which did you consider to be your main employment?

CURRENT/MOST RECENT EMPLOYER: Pete's Pipes
OTHER 1992 EMPLOYER: self--plumbing

[IWER: PROBE DETAILS OF OVERLAP AND ENTER BELOW]
If Head or Wife/"Wife" had more than one main job in 1992, this Interviewer Checkpoint lets you compare the months worked on each job and check for any overlaps. Depending on whether there is an overlap (and how much of an overlap), select the appropriate result code.

If R reports an overlap of more than one month, the questions on this follow-up screen will help to clarify Head's/Wife's/"Wife's" employment situation. Ask all questions on the screen, and probe for specific responses.
1992 Work Weeks

B&C60-78 is asked for all Heads/Wives/"Wives"

Even if she/he did not work at all in 1992, we need to know how much of that time she/he was:

a) Employed but temporarily off the job
b) Unemployed and looking for work
c) Not Employed and Not Looking for a job

We need as much information as you can get in this series, so focused probing is acceptable. We do not need day-to-day accounting of Head's/Wife's/"Wife's" time, but try to get a complete picture of how she/he spent all 52 weeks of 1992. Enter [F2] comments for any unusual or complex situations.

To insure that the weeks listed add up to 52 weeks or 12 months, we have designed a "verification" screen, at which all information from this sequence is summarized and you are able to confirm items with R and make adjustments, if necessary. With this in mind, please record whatever R tells you while going through the sequence, knowing that you can make any corrections at the verification screen.

The objectives of this sequence:
1. Separation of weeks into periods of work and non-work on main job(s),
2. Average work hours per week for weeks worked, and
3. Annual overtime hours

In order to achieve them, several key concepts must be kept in mind:

Work in these questions means simply and only main job employment. Head had an employer (or was self-employed) and was either working at that job or was temporarily off but expected to return to it. This latter situation includes a) sick time, whether paid or unpaid; b) vacation, leave, or "time off," whether paid or unpaid; c) strike; and d) temporary layoff. In all these cases, Head/Wife/"Wife" was employed and expected to return to the job.

Unemployment vs. Temporary Layoff is a little more complicated. Temporary Layoff, as mentioned in the example above, is time off from a job while remaining officially employed on it and with the expectation of returning to the same employer. A permanent lay-off is required for "unemployed" status. The problem arises when, after being temporarily laid off for a long time, Head/Wife/"Wife" decides she/he will not return to the employer and finds another job.

Weeks spent as unemployed weeks require two conditions. First, Head/Wife/"Wife" had no job or other way of making money during those weeks. Either her/his job had ended or she/he has never had a job. This situation is probably obvious from the work history, but you might need to probe. Second, Head/Wife/"Wife" must be looking for a job in order to be considered truly unemployed. We accept R's word on this (i.e., no probing).
Not Working and Not Looking is often confused with taking time off and temporary layoff. As with unemployment time, two conditions must be met. Again, Head/Wife/"Wife" had no job and did no other work for money during this time. Either her/his job had ended, or she/he has never had a job. Second, contrary to the rule for unemployed weeks, she/he was not looking for work during this period. Good examples here are full-time students with no job and no intention of working while in school, Heads/Wives/"Wives" keeping house, and fully retired jobless Heads/Wives/"Wives" who aren't looking for second careers. Heads/Wives/"Wives" who took time off or were temporarily laid off from a job cannot meet this Not Working/Not Looking condition since they were employed at the time.

Head/Wife/"Wife" must have been employed and missed time from her or his job for any weeks mentioned in B&C60-61 (illness of others), B&C63-64 (illness of self), and B&C66-67 (vacation or time off). If Head/Wife/"Wife" did not have a job and neither worked nor looked for work because of illness or because she/he was taking time off, this time should be recorded in B&C75-76.
**B&C60.** Did you miss any work in 1992 because someone else was sick?

1  YES
5  NO

<table>
<thead>
<tr>
<th>MONTHS WORKED</th>
<th>EMPLOYERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>JAN</td>
<td>Bridges, Unl</td>
</tr>
<tr>
<td>FEB</td>
<td></td>
</tr>
<tr>
<td>MAR</td>
<td></td>
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<td>APR</td>
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<td>MAY</td>
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<td>NOV</td>
<td></td>
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<tr>
<td>DEC</td>
<td></td>
</tr>
</tbody>
</table>

**B&C61.** How much work did you miss? (ILLNESS SOMEONE ELSE)

DAYS:
WEEKS:
MONTHS:

When was that:

**B&C63.** Did you miss any work in 1992 because you were sick?

1  YES
5  NO
"Someone else" means anyone, not just FU Members. Include paid and unpaid sick leave or funeral time. Actual dates are not needed for a few days here and there, but we do need dates for large amounts of time. If R can volunteer such information, great!

This follow-up screen appears for all initial questions in this sequence with a YES response. Note that the string of months worked in 1992 is displayed at the top of the screen, to help both you and the R. You may enter R’s response in any combination of days, weeks, and months, then enter when during the year this period occurred.

Again, we don’t need dates for the occasional flu. If Head/Wife/Wife” missed a month or more, however, please get information that’s as specific as possible. Ask whether the time was scattered through the year or all at one time.
B&C66. Did you take any vacation or time off during 1992?
1  YES
5  NO

B&C69. Did you miss any work in 1992 because you were on strike?
1  YES
5  NO

B&C72. Did you miss any work in 1992 because you were unemployed and looking for work or temporarily laid off?
1  YES
5  NO

B&C75. Were there any weeks in 1992 when you didn't have a job and were not looking for one?
1  YES
5  NO

Then, how many weeks did you actually work on your main job in 1992?

00. DID NOT WORK AT ALL IN 1992
97. ALL THE REST
98. DK
99. RF
WEEKS WORKED IN 1992:
Include paid and unpaid holidays, vacation time, etc. Teachers who are off for the summer should count that time here (as vacation). But we are seeing a few teachers who are actually laid off during the summer months (even getting unemployment compensation) and are rehired in the fall. These (thus far) unusual cases should report the summer time off at B72 or possibly B75.

"Maternity leave" and various other temporary, voluntary leaves of absence also belong here. From this point through B75, please get dates as specific as possible.

Beware of overlaps with unemployment, temporary layoff, etc. Illegal strikes count as YES here, too.

Check dates at this question against the displayed employment string. Head/Wife/"Wife" couldn't have been unemployed and looking for work during weeks when she/he was earning money.

Head/Wife/"Wife" cannot have had vacation weeks while she/he is unemployed; i.e., no vacation from job hunting! If Head/Wife/"Wife" reports being unemployed and looking for work (not temporarily laid off) and "on vacation" during the same time period, ask if she/he took earned vacation time and then was laid off. If the permanent layoff came first and then Head/Wife/"Wife" spent some time doing "nothing", this kind of "vacation" goes in B75. However, vacation weeks occurring during a period of temporary layoff may be reported at B66.

Again, check the string of employment months at this question. The occurrence of any job during a B75 time period means that Head/Wife/"Wife" was employed at a main job and therefore can't list the time here. But, if Head/Wife/"Wife" had no job and reports the same time both here and as time off at B&C66, it belongs here.

We want the total number of weeks during which the Head/Wife/"Wife" did any work. Do not allow R to combine hours from different weeks, such as "10 hours a weekend for 20 weeks--so, about 5 weeks of work altogether." This is not 5 weeks at 40 hours per week, it's 20 weeks at 10 hours per week. If Head/Wife/"Wife" alternates weeks working and weeks off (e.g., "80 hours a week for 2 weeks, then 2 weeks off"), get the details in an [F2] comment. The weeks worked belong here, and the weeks off belong in the B72 sequence as temporary layoff, or in the B66 sequence as vacation.
MONTHS WORKED

<table>
<thead>
<tr>
<th>JAN</th>
<th>FEB</th>
<th>MAR</th>
<th>APR</th>
<th>MAY</th>
<th>JUN</th>
<th>JUL</th>
<th>AUG</th>
<th>SEP</th>
<th>OCT</th>
<th>NOV</th>
<th>DEC</th>
</tr>
</thead>
</table>

EMployers

| Bridges, Uni |

<table>
<thead>
<tr>
<th>Y/N</th>
<th>DAYS</th>
<th>WEEKS</th>
<th>MONTHS</th>
<th>WHEN</th>
</tr>
</thead>
<tbody>
<tr>
<td>ILLNESS OTHER</td>
<td>YES</td>
<td>3</td>
<td>.</td>
<td>.</td>
</tr>
<tr>
<td>ILLNESS SELF</td>
<td>NO</td>
<td>.</td>
<td>.</td>
<td>.</td>
</tr>
<tr>
<td>VACATION</td>
<td>YES</td>
<td>2</td>
<td>.</td>
<td>.</td>
</tr>
<tr>
<td>STRIKE</td>
<td>NO</td>
<td>.</td>
<td>.</td>
<td>.</td>
</tr>
<tr>
<td>UNEMP/LAY-OFF</td>
<td>NO</td>
<td>.</td>
<td>.</td>
<td>.</td>
</tr>
<tr>
<td>NW/NL</td>
<td>NO</td>
<td>.</td>
<td>.</td>
<td>.</td>
</tr>
</tbody>
</table>

Weeks Missed/Not Working: 2.599999  Weeks Worked: 49.4  Total Wks: 52

UPDATE

| COMMENT/CONTINUE |

**B&D79/C&71.** And, on the average, how many hours a week did you work on your main job in 1992?

IWER: PROBE QUALIFIED ANSWER, RANGE, OR DK:
What's your best estimate?

USE F2 FOR COMMENT

1 - 997 ACTUAL HOURS
998 DK
999 REFUSAL

**B&D80/C&E72.** Did you work any overtime which isn't included in that?

1  YES
5  NO
Verification

This screen summarizes R's answers from the previous question sequence and facilitates the process of verification. Note the display of months worked and employer name(s) across the top for reference, and the bottom line of summary data. CATI calculates number of weeks and notes discrepancies. However, CATI does not decide whether the answers make sense, accounting for gaps, overlaps, or double counting—you need to do that. Please remember that just because the weeks add up to 52 doesn't mean they are correct.

The recommended procedure is to toggle down the Y/N column and verify only the YES lines by using /RR/ probes. Then, /RR/ Weeks Worked and check that Total Weeks adds up to 52.

If there is a discrepancy, you should attempt to reconcile this with the R. To make a correction to the "time off" amounts, use the arrow keys to move to the location on the grid. In the Y/N column, use [F3] to select YES or NO. In the remaining columns, you can type directly onto the screen. After making corrections, highlight UPDATE and press [Enter]. CATI will re-calculate the weeks and adjust the bottom summary line.

When you are done reviewing, highlight COMMENT/CONTINUE and press [Enter] to go on to the next screen. If you have attempted to reconcile (R insists answers are correct) but still have a discrepancy, highlight COMMENT/CONTINUE, use [F2] to enter your explanation note, and then press [Enter] to go on to the next screen.

B&D79

If Head/Wife/"Wife" changed main jobs in 1992, we need the average hours per week figured over all main jobs here. Follow-up questions ask the average per week for each separate job.

B&D80

Be careful not to double count any overtime hours already included in B&D79 (average number of hours worked each week). Include both paid and unpaid hours in 1992.
B&D82/C&E74. Did you have an extra job or other way of making money in addition to your main job in 1992?

1 YES
5 NO

B&D90/C&E82. In what month and year did you start working on this extra job (SELF-consulting)?

JAN JUL "winter"
FEB AUG "spring"
MAR SEP "summer"
APR OCT "fall/autumn"
MAY NOV DK
JUN DEC RF

ENTER THE LAST TWO DIGITS OF ACTUAL YEAR (01 - 93)

19
97 BEFORE 1992, DK EXACT YEAR
98 DK YEAR AT ALL
99 REFUSAL

B106/C98. Did you have any other extra jobs in 1992?

1 YES
5 NO
Main vs. Extra Job distinctions are not as difficult as they seem. Very simply, Head/Wife/"Wife" cannot have an extra job unless she/he has a main job during the same time period. The extra job must be held simultaneously with the main job. Remember, we just pointed out above that Heads/Wives/"Wives" who were temporarily laid off (B&C72) were still employed at a main job and, therefore, could have had an extra job during this time period. However, Heads/Wives/"Wives" who were unemployed and looking (B&C72) or not working and not looking (B&C75) are saying that they had no main job employer during the time in question. But if Head/Wife/"Wife" was working for money at all during these times, this work is not an "extra" job. It is considered a main job.

If Head/Wife/"Wife" worked at a number of irregular jobs in 1992, the distinction between "main" job(s) and "extra" job(s) may not be as clear. That being so, this series of questions still allows us to get more complete information on the kind(s) of work she/he did. We're interested in any job that brought in income; examples include a small business conducted from home, a night watchman position, door-to-door sales, or anything else involving work and income for Head/Wife/"Wife." If R tells you about time spent and money made on illegal activities such as gambling or drugs, that is acceptable. "Other way of making money" means any work, even if it was enjoyable, that produced income.

Asking this question sequence for each extra job may take some time, but we need to know each source of work income Head/Wife/"Wife" had during the past year. We have allowed for up to four extra jobs in the questionnaire—use an Extra Jobs Supplement for any additional jobs.

These dates will help us check for overlap with spells of Unemployment or Not Working/Not Looking.

As mentioned above, we have allowed for up to four extra jobs. After each question sequence, you will ask R if Head/Wife/"Wife" had any other extra jobs and go through the questions again if YES. If she/he has more than four extra jobs, please record the additional information on an Extra Job Work History Supplement.
C&E4. Has she ever done any work for money?
1 YES
5 NO

C&E5. In what month and year did she last work?
IF NECESSARY: What would be your best estimate?
Did she last work before 1992?

| JAN | JUL | "winter" |
| FEB | AUG | "spring" |
| MAR | SEP | "summer" |
| APR | OCT | "fall/autumn" |
| MAY | NOV | DK |
| JUN | DEC | RF |

ENTER THE LAST TWO DIGITS OF ACTUAL YEAR (01 - 93)
19 90
96 1992 OR 1993, DK WHICH
97 BEFORE 1992, DK EXACT YEAR
98 DK YEAR AT ALL
99 REFUSAL

C&E6. Were there any times in 1992 when she was looking for work?
1 YES
5 NO

C&E9. What was her main occupation on her last job?
What sort of work did she do?
C&E9a. What were her most important activities or duties?

C&E15. What happened with that employer—did the company go out of business, was she laid off, did she quit, or what? (Any other?)
If Head/Wife/"Wife" is not currently working, we need to know if she/he ever has done any work for money. If Head/Wife/"Wife" has never done any work for money, and she/he is not currently looking for work, this entire section will be skipped.

If Head/Wife/"Wife" is not currently working, but has worked in the past, this sequence provides a short version of asking work week information for people who haven't worked since before last year. If Head/Wife/"Wife" has done any work since January 1, 1992, we need to get her/his work history for 1992. In this case, we then proceed to collect abbreviated occupation, industry, and work history information.

If Head/Wife/"Wife" has not worked since before 1992, we ask if she/he looked for work in 1992 and, if so, how much time she/he spent doing that.

If Head/Wife/"Wife" did work since January 1992, you ask the standard employment and industry questions about her/his last job.

For Heads/Wives/"Wives" who are not currently working and who did work in 1992, this question asks why they left their last employer. Please probe /AO/ on this question.
F2. About how much time does your wife spend on housework in an average week? I mean time spent cooking, cleaning, and doing other work around the house.

IWER: PROBE QUALIFIED ANSWER, RANGE, OR DK:
What's your best estimate?

HOUSEWORK HOURS PER WEEK

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 - 111 ACTUAL HOURS</td>
<td>1 - 111 ACTUAL HOURS</td>
</tr>
<tr>
<td>112 HOURS OR MORE</td>
<td>112 HOURS OR MORE</td>
</tr>
<tr>
<td>998 FINAL DK [AFTER PROBE]</td>
<td>998 FINAL DK [AFTER PROBE]</td>
</tr>
<tr>
<td>999 REFUSAL</td>
<td>999 REFUSAL</td>
</tr>
</tbody>
</table>

F5. How many days a week does the family sit down and eat the main meal of the day together?

IWER: ENTER EXACT DAYS PER WEEK 0-7, OR 8 IF DK, 9 IF RF

F8. Did you or anyone else in your family use government food stamps at any time in 1992?

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>YES</td>
</tr>
<tr>
<td>5</td>
<td>NO</td>
</tr>
</tbody>
</table>
Part 4: Section F--Housework, Child Care, and Food

F2

We ask this question of both Head and Wife/"Wife". If roomers or boarders are living in the HU, time spent by Head or Wife/"Wife" cleaning these rented rooms should not be counted here. That housework is income-producing work and should be included in Section B or C (for the Head) or Section D or E (for the Wife/"Wife"). If R is unable to separate the time, make a note in [F2] that time spent cleaning boarders' rooms is included in the housework hours.

Count here only housework that is done by Head, Wife, or "Wife" for FU Members. Outside house and grounds maintenance and/or yard work are acceptable, but gardening time that generates food for sale or FU consumption should not be included here. Also exclude time devoted solely to children and repairing or renovating the house. If R can't give you a precise number of hours per week, replies such as "all the time," "a few hours a week," "just a few minutes a day," etc., should be probed with "Could you be more specific" (/MS/). If R still can't give you an accurate response, record her/his answer in an [F2] comment.

F5

We are really looking for actual "days a week." Quantitative replies such as "every day" and less precise ones such as "once in a while" should be probed. The term "family", as usual, refers only to FU Members.

The questions in this sequence detail Food Stamp usage and food costs for the FU only. If amounts for non-FU Members can't be removed from FU amounts, please make an [F2] comment, giving the gender and age of any "extra eaters".

F8

"Commodity stamps" is an obsolete regional term that an R might use when referring to food stamps. Commodity stamps are issued by the local government, whereas food stamps are issued by the federal government. If R says the FU received commodity stamps, select YES at F8.
F9. How many dollars' worth of stamps did you get in 1992?

IWER: PROBE QUALIFIED ANSWER, RANGE, OR DK:
What's your best estimate?

<table>
<thead>
<tr>
<th>FOOD STAMP AMOUNT: $</th>
<th>RECEIVED PER:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>MONTH</td>
</tr>
<tr>
<td></td>
<td>2 WEEKS</td>
</tr>
<tr>
<td></td>
<td>WEEK</td>
</tr>
<tr>
<td></td>
<td>OTHER [USE F2 TO RECORD]</td>
</tr>
</tbody>
</table>

F11. Did you or anyone else now living in your family receive government food stamps last month?

1 YES  5 NO

F12. For how many members of your family were stamps issued?

[IWER: "family" REFERS TO MEMBER IF THIS FU ONLY]

1 - 7 ACTUAL MEMBERS
8 8 OR MORE MEMBERS
9 DK OR REFUSAL

F14. In addition to what you bought with food stamps, did you or anyone else in your family spend any money on food that you use at home?

1 YES  5 NO
F9

This is the cash value of the stamps for the entire year of 1992. Usually R will give per month or 2 weeks. If R gives the total dollar amount for the whole year, great—record the unit in [F2], then select OTHER.

F11

This question is referring to last month only.

F12

Sometimes, some FU Members are eligible for food stamps while other FU Members are not. Probe for the number of FU Members for whom stamps are issued. If R includes non-FU Members here (e.g., former Splitoff daughter with own Coversheet lives in the HU), do not count them.

F14

Food bought elsewhere and eaten at home belongs here. This includes groceries and carry-out prepared foods from groceries, restaurants, etc. that are brought home to eat. The follow-up question (F15) asks for a weekly or monthly figure for all the persons now living in the FU. We do not want to include expenditures on non-food items such as toothpaste, soap, paper towels, dog food, etc.
F16. Do you have any food delivered to the door which isn't included in that?

1  YES
5  NO

F18. About how much do you and everyone else in your family spend eating out, not counting meals at work or school?

IWER: PROBE QUALIFIED ANSWER, RANGE, OR DK:
What's your best estimate?

COST OF EATING OUT:  $

PER:  WEEK
2 WEEKS
MONTH
OTHER [USE F2 TO RECORD]
Food *delivered* to the FU and eaten at home belongs here. Again, it may be groceries (milk, eggs, etc.) or prepared ready-to-eat food (pizza, meals-on-wheels, etc.); the distinction between F14 and F16 is that some service (i.e., cooking, delivery) is included in the cost of the food.

Food that is both bought and eaten elsewhere, as in a restaurant, belongs here. We do not want to include special events (parties, wedding receptions, etc.), or lunches eaten at restaurants during the work day.
G5. Did you or anyone else in the family there own a business at any time in 1992 or have a financial interest in any business enterprise?

[REFERS TO MEMBERS OF THIS FU ONLY.]

1  YES
5  NO

G6. How many businesses or financial interests did you own in 1992?

IWER: ENTER 1 - 5 FOR NUMBER OF BUSINESSES, 8 IF DK, 9 IF RF

G7. What kind of business was that?

G8. Who in the family owned that business?

REFER TO MEMBER OF THIS FU ONLY

1, HEAD
2, WIFE/WIFE
3, RELATIVES(SPECIFY)
7, OTHER(SPECIFY)
Part 5: Section G—Income

- If Head or Wife/"Wife" reports work income in Section G, hours for that work must be reported in Section B/C or D/E.

- If Head or Wife/"Wife" reports working during 1992 in the employment sections, income from those hours must be reported in Section G.

- All wages and salaries listed in Section G should be before taxes and other deductions are taken out. All profit or loss amounts should be net (i.e. after expenses) but before income taxes.

G5-8

Do not include stock ownership in G6. These questions refer to any business or financial interest owned by anyone in the FU. Get detail on what the business is and specify who in the family owned it. If the family has more than one business, this question sequence repeats for each separate business up to 5.
<table>
<thead>
<tr>
<th>Months Worked</th>
<th>Employers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sep, Oct, Nov, Dec</td>
<td>Bridges, Unlimited</td>
</tr>
<tr>
<td>Jan, Feb, Mar, Apr, May, Jun, Jul, Oct, Nov, Dec</td>
<td>SELF-consulting</td>
</tr>
</tbody>
</table>

[IWER: PROBE IF INCONSISTENT WITH EMPLOYER DATA]

**G9a.** Did you put in any work time for this business in 1992?

| 1 | YES |
| 5 | NO |

[IWER: ARE THESE WORK HOURS REPORTED? PROBE IF NECESSARY]

**G9b.** Did you tell me about this work earlier?

| 1 | YES, THESE WORK HOURS ARE REPORTED |
| 5 | NO, THESE WORK HOURS ARE NOT REPORTED |

**G9c.** Did your wife put in any work time for this business in 1992?

| 1 | YES |
| 5 | NO |

**G10.** Was it a corporation or an unincorporated business?

1. CORPORATION
2. UNINCORPORATED
3. OTHER (SPECIFY)
8. DK
9. RF
These questions are crucial. If the Head put in work time, these hours should be reported in Section B/C, and the Wife's/Wife's work time should be reported in Section D/E.

If Head/Wife/Wife had any job(s) during 1992, the months of their employment will be displayed across the tops of these screens. This allows you to probe the Respondent (IRR/) if what they are telling you about their work for the business is inconsistent with previous data. If the Head/Wife/Wife put in work time for a business and the R hasn't already reported it, an entire job sequence follows, where you collect all occupation and industry information as if it were a main or extra job.

If R doesn't understand this question, select DON'T KNOW. If some FU Member owned a business in 1992, but R doesn't know whether the business was incorporated or not, record any details in a note in [F2] and select 8 DK.
G11a. How much was (your/his/her/their) share of total income from the business in 1992—that is, the amount (you/he/she/they) took out plus any profit left in?

[PROBE QUALIFIED ANSWER, RANGE, AND DK: What's your best estimate?]

NET PROFIT FROM THE BUSINESS: 1 - 9999997 DOLLAR AMOUNT
9999998 99,998 OR MORE
9999999 FINAL DK OR REFUSAL

G12. Did you earn wages or salaries in 1992 from working on any jobs? Other than the unincorporated business we have just talked about?

IF NECESSARY, REVIEW ABOVE EMPLOYMENT HISTORY AND ADD: Including wages or salaries from the job(s) we already talked about?

1 YES
5 NO

G13. How much did you earn altogether from wages or salaries in 1992, that is, before anything was deducted for taxes or other things?

[PROBE QUALIFIED ANSWER, RANGE, AND DK: What's your best estimate?]

WAGES/SALARIES EARNED IN 1992: 1 - 9999997 DOLLAR AMOUNT
9999998 99,998 OR MORE
9999999 FINAL DK OR REFUSAL
The amount given here is net profit (i.e. after expenses), the amount they paid income taxes on. If part of this amount is counted as Head's/Wife's/'Wife's' "draw" and another part as profit from the business, record both sums separately in an [F2] comment and tell us which is which. Record the total profit as the final answer; do not double count the draw.

If the Wife/'Wife" or other FU Member is not a part owner and is paid wages or salary by the unincorporated business, that amount should not be included here. It belongs with the Wife's/"Wife's" or OFUM's job income questions. If Wife/"Wife" or other FU Member is part owner, we would like their separate part(s) of the total profit recorded as an [F2] comment. If only the total amount is known, record the total amount as the answer to G11a and record who received it in an [F2] comment.

If Head was working in 1992, G12 almost certainly should be marked YES. Because many Respondents give an answer of NO here, thinking we aren't interested in all of the jobs that she/he has already told us about, there is a probe right on the screen for you to use if necessary.

This question applies only to current Head. For most wage-earners, the amount here is the income reported on the W2 form(s). It should include income from extra jobs if Head had one. Here we catch small amounts from part-time jobs that were not mentioned while you were asking Section B/C. Note the section of the question referring to the unincorporated business--this only appears when the FU owns an unincorporated business and has just gone through that question sequence.

Be careful of the following:

• fixed salary rates: if Head now makes $10,000 a year, this doesn't necessarily mean that she/he made $10,000 in 1992. Head may, for example, have had a raise in September or started work after graduating from college in June. We want total 1992 wages/salary, not the current salary rate.

• complicated work history: if Head has several jobs and was unemployed during part of the year, remind her/him of the several jobs and get total income from all 1992 wages.

• self-employed Heads: wages and salaries that unincorporated business people pay themselves should not be listed here; this should be recorded at G11a. However, wages from any other job or incorporated business should be listed here.
G14/G16. In addition to this, did you have any income from bonuses, overtime, tips, or commissions?

1  YES
5  NO

G18. Did you receive any other income in 1992 from professional practice or trade? REFER TO HEAD ONLY.

1  YES
5  NO

G18. (Did you receive any other income in 1992) from farming or market gardening? REFER TO HEAD ONLY.

1  YES
5  NO

G18. (Did you receive any other income in 1992) from roomers or boarders?

A ROOMER OR BOARDER MUST BE A NON-FU MEMBER AND HEAD MUST DO WORK FOR THIS INCOME.

IF YES, USE F2 TO RECORD RTH OF ROOMER

1  YES
5  NO

G23. Did you include your earnings from the extra job(s) in the amounts we just talked about?

1  YES
5  NO
G14/G16

Note the phrase "in addition to this." If Head has already included some or all of the income from these sources in G13, do not double-count it here.

G18

PROFESSIONAL PRACTICE: Includes self-employed doctors, lawyers, and CPAs who don't report their earnings as salary or business income, as well as those with income from consulting, honoraria, etc.

TRADE: Includes self-employed tradesmen such as plumbers, carpenters, electricians, etc. A carpenter may receive wages from a construction company and also do independent work; this "side" work goes here. Income already given at G11a or G13 should not be included here. We need net income after expenses.

FARMING OR MARKET GARDENING: If farming is Head's current main job occupation, the farming income is collected in G2-G4 and not here. But if Head's current main job in Section B is not farming, include any amounts earned from farming in 1992 here (main or extra jobs).

ROOMERS OR BOARDERS: This is money paid to Head by non-FU Members for separate room(s) and/or prepared meals. Stress "roomers" or "boarders" in the question to indicate the source of the income. Head must do work for this money (e.g., clean rooms, change bedding, launder clothes, cook), so if income is reported in response to this question, work hours should be mentioned in Section B/C. If no work was done, you are probably dealing with "rent income," which is asked after this in G25. We want net income here (i.e., the money received minus expenses). However, if R cannot separate the food costs, record the age and gender of the boarder(s) in an [F2] comment so we can attempt a calculation.

Note: Money paid for rent or room and board by an FU Member is not included as income here or anywhere else. But money from an HU Member who is not in the FU is income. For example, a former Splitoff who has his own CS and shares his parents' HU is considered a separate FU. He pays his parents for room and board, which is recorded here (or, if he pays rent only, recorded at G25).

G23

The purpose of this question is to help you make sure that if Head had work hours on extra jobs, we get the income from them. If the answer to G23 is NO, a follow-up question asks how much Head earned from her/his extra jobs in 1992.
<table>
<thead>
<tr>
<th>G25.</th>
<th>Did you receive any other income in 1992 from rent?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>YES</td>
</tr>
<tr>
<td>5</td>
<td>NO</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>G25.</th>
<th>(Did you receive any other income in 1992) from dividends?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>YES</td>
</tr>
<tr>
<td>5</td>
<td>NO</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>G25.</th>
<th>(Did you receive any other income in 1992) from interest?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>YES</td>
</tr>
<tr>
<td>5</td>
<td>NO</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>G25.</th>
<th>(Did you receive any other income in 1992) from trust funds or royalties?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>YES</td>
</tr>
<tr>
<td>5</td>
<td>NO</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>G25.</th>
<th>(Did you receive any income in 1992) from ADC or AFDC? REFERS TO HEAD ONLY.</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>YES</td>
</tr>
<tr>
<td>5</td>
<td>NO</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>G25.</th>
<th>(Did you receive any other income in 1992) from Supplemental Security Income?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>YES</td>
</tr>
<tr>
<td>5</td>
<td>NO</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>G25.</th>
<th>(Did you receive any other income in 1992) from other welfare?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>YES</td>
</tr>
<tr>
<td>5</td>
<td>NO</td>
</tr>
</tbody>
</table>
RENT: Head may own real estate or other property that is rented to others. The income should be net, i.e., after expenses are deducted but before income taxes. Expenses include maintenance, property taxes, mortgage payments, etc. Once again, here is the place to report money paid to the Head by non-FU Members for living in the HU (i.e., Head does no work for the money). Rent payments by a former Splitoff who has her/his own coversheet (and who lives in the HU) are fairly common here.

DIVIDENDS: Dividends are the amounts paid to stockholders by corporations. If Head owns a small incorporated business, she/he may have taken profits out of the business by paying a dividend to her/himself on common stock. These dividends, as well as any income received on other stocks Head owns, belong here. Sometimes companies pay dividends by giving stockholders more shares. These are stock dividends and should not be included here. However, all cash dividends must be included here, regardless of whether Head used them to buy more stock in the company. "Dividends" on insurance policies are not income and should not be included.

INTEREST: Receipts here include interest from all kinds of savings accounts, money market funds, income from government and corporate bonds, interest on mortgages owned (not those Head is paying on), as well as interest received on personal loans made.

TRUST FUNDS: A trust fund is money invested by a person or group of persons for another person known as a beneficiary. If Head is a beneficiary, these payments belong here.

ADC or AFDC (Aid to [Families with] Dependent Children) covers needy single parents with children under age 18, as well as two-parent families with the father present in the household but not working. Please read the acronyms ADC and AFDC to Rs, even though they are in uppercase letters—this isn’t an interviewer instruction! We are very interested in getting a good estimate of this form of welfare, as distinct from other types of welfare. If the family is covered by a number of programs, make sure the dollar amount for ADC/AFDC is separate from all other forms of public assistance.

SUPPLEMENTAL SECURITY INCOME (SSI): SSI is not Social Security, although the program is administered by the Social Security Administration and a person can receive both. Generally it’s for people who didn’t (or can’t) work long enough to qualify for Social Security. Three categories of recipients are:

1. The elderly, over 65, who did not work enough to qualify for Social Security.
2. The disabled
   a) adult (18 and older) with a physical or mental condition that keeps her or him from working for 12 months or is considered terminal.
   b) child (under 18) with a physical or mental condition that would keep an adult from working for 12 months or is considered terminal.
3. The blind, either adult or child, with severely limited or no vision.

This must be Head’s SSI only. Head must be the recipient (i.e., the check is in Head’s name). SSI checks received by children but cashed by Head still belong to the child and should be listed in the OFUM question sequence.

OTHER WELFARE covers general assistance usually funded by state and local governments. This is a catchall covering the needy who are not eligible for the "categorical" welfare programs asked about in the previous questions. If Head and Wife/*Wife* receive "other" welfare jointly and cannot separate the amounts, report the total here, not in the Wife’s/*Wife’s* income questions. Explain in an [F2] comment that it is joint income.
G31. Did you or anyone else in the family there receive any income in 1992 from Social Security?
1. YES
5. NO

G32. Who was that?

[IF EVER USE F3 TO CHANGE "NO" TO "YES" IF THE PERSON HAD S.S. INCOME]

<table>
<thead>
<tr>
<th>FIRST NAME</th>
<th>LAST NAME</th>
<th>RELATIONSHIP</th>
<th>HAD S.S. INCOME</th>
</tr>
</thead>
<tbody>
<tr>
<td>SUSAN</td>
<td>HOWE</td>
<td>NEW WIFE</td>
<td>NO</td>
</tr>
<tr>
<td>ANICIA</td>
<td>HOWE</td>
<td>DAUGHTER</td>
<td>NO</td>
</tr>
</tbody>
</table>

CONTINUE

[SOCIAL SECURITY OF ANICIA]

G33. Was that disability, retirement, survivors' benefits, or what?
1. DISABILITY
2. RETIREMENT
3. SURVIVORS' BENEFITS/dependent of deceased recipient
5. Dependent of disabled recipient
6. Dependent of retired recipient
7. OTHER(SPECIFY)
8. DX
9. RF

G37. Did you receive any income in 1992 from the Veteran's Administration for a servicemen's, (widow's,)
or survivor's pension, service disability or the GI bill?

REFERS TO HEAD ONLY.

1. SERVICEMEN'S, (WIDOW'S,) OR SURVIVOR'S PENSION
2. SERVICE DISABILITY
3. GI BILL
4. OTHER(SPECIFY)
5. NO
SOCIAL SECURITY: We want Social Security information about all FU Members here to help us avoid double-counting of benefits. If the answer to G31 is YES, the follow-up screen (G32) lists all FU Members and their relationships to Head. In the HAD S.S. INCOME column, use [F3] to change NO to YES for each individual who received Social Security.

Generally, there are three types of recipients of regular Social Security (not including Medicare):

1. **Retired** people 62 or older who are qualified.
2. **Disabled** workers who became severely disabled before age 65.  
   Disabled means having a severe physical or mental condition which  
   a) prevents one from working and  
   b) is expected to last at least 12 months or result in death.
3. **Dependents** of a covered worker who has retired, become disabled, or died. These are typically spouses, widows or widowers, and unmarried children under 18, or under 19 and full time high school students.

If R says someone is receiving "Dependent's" benefits "from Head", "from Mother", etc., determine whether they are dependents (receiving benefits as a result) of a retired, disabled, or deceased person. If the person upon whom they are dependent is retired or disabled, select the "Dependent of disabled recipient" or "Dependent of retired recipient" categories.

Note: Benefits received by unmarried children under 18, or under 19 and full-time high school students, are usually paid to the parents or guardian. In an [F2] comment, please indicate who the parent or guardian is by relationship and person number, if possible (no names, of course).

VETERAN'S PENSIONS: There are various armed service benefits and state and federal government pensions for ex-military personnel and their families.

1. Disability pension: for a permanent injury received in military service.
2. Retired service pension: an officer or enlisted person is eligible for such a pension after 20 years' service.
3. Widow's or survivor's pension: paid to the wife or husband and dependents of deceased military personnel.
4. GI Bill payments: may be for school tuition or student living expenses, grants to help buy a home or start a business.

Some people get military service benefits directly from the Navy, Army, or other branch in which they served, rather than from the Veterans Administration (VA). Include all military stipends here, even if the check doesn't come from the VA.
Did you receive any income in 1992 from other retirement pay, pensions, or annuities?

1. RETIREMENT PAY, PENSIONS
2. ANNUITIES, IRAs
3. OTHER (SPECIFY)
5. NO

Did you receive any income in 1992 from unemployment compensation?

1. YES
5. NO

(Did you receive any income in 1992) from workers compensation?

1. YES
5. NO

(Did you receive any income in 1992) from child support? REFERS TO HEAD ONLY.

1. YES
5. NO

(Did you receive any income in 1992) from alimony or separate maintenance? REFERS TO HEAD ONLY.

1. YES
5. NO
PENSIONS: From previous employers, federal and state employee pensions, etc. Money paid into a retirement plan is not income. It will only become income when it is paid out. Include permanent, long-term disability paid in regular payments by employer, but not amounts already reported as armed services related (G37) or Social Security Disability (G31).

ANNUITIES: Regular payments, usually for 10 years, 20 years, or life. Individual Retirement Annuity (IRA) payments are included here.

UNEMPLOYMENT COMPENSATION: All the states participate in this program, which is administered by them with funds from employer contributions and the federal government. States vary greatly in the amount of benefits.

WORKERS COMPENSATION: Money to replace lost wages for employees injured on the job.

CHILD SUPPORT: If Head receives child support payments, note it here. Be careful that child support is not confused with ADC payments. If child support is received by Wife/"Wife," it should not be included here.

ALIMONY or SEPARATE MAINTENANCE: Payments from an ex-spouse as a result of divorce or separate maintenance. Do not include child support here.
**G44.** Did you receive any help in 1992 from relatives?  **THIS MUST BE FROM NON-FU MEMBER.**

1. YES
   
5. NO

**G44.** Did anyone else not living with you help you and your family out by giving you money during 1992?

1. YES

5. NO

**G44.** Did you receive any other income in 1992 from anything else?

IF "YES", USE F2 TO SPECIFY.

1. YES

5. NO
HELP FROM RELATIVES: Include money received from relatives who are not FU Members. This is help in the form of cash, not goods, and does not include gifts for special occasions. The "twenty dollars my mother sends every month to help out" would go here; "a hundred dollars for a wedding present" would not. Be sure this amount isn't double-counted with rent received from former Splitoff children.

HELP FROM OTHERS: This question applies to financial help given to any 1992 FU Member, not just Head. Include both regular and irregular amounts of income given by unrelated individuals outside the FU, including gifts (cash only). An [F2] comment indicating regular or irregular, several times or one time, would be appreciated.

ANYTHING ELSE: Use [F2] to specify what this money is from, then enter 1 YES. Some examples:

1. Training Program Allowance: Manpower Development Acts provide vocational training, as well as paying subsistence allowances. Unemployed young adults sometimes receive this form of income.

2. Illegal sources of income: Record here if R mentions. If you can get them, any work hours involved would be greatly appreciated!

3. Family allotments: Dependents of armed services personnel on active duty receive allotments from the government. If R tells you her daughter or husband is in the service, be alert for income here.

4. Government grants of any kind: Be sure this income has not already been reported. Don’t include tax refunds, or GI Bill payments (see G37).

5. Land contracts or mortgages owned: If possible, try to find out how much of the payment is principal and how much is interest.
G50. Did your wife receive any income during 1992?
1  YES
5  NO

G51a. Was any of it earnings from her work?
1  YES
5  NO

G52. How much did she earn altogether from work in 1992, that is, before anything was deducted for taxes or other things?

[PROBE QUALIFIED ANSWER, RANGE, AND DK: What's your best estimate?]

EARNINGS FROM WORK: 1 - 9999997 DOLLAR AMOUNT
9999998 99,998 OR MORE
9999999 FINAL DK OR REFUSAL

[OFUM LISTING]

[IFER: ASK OFUM QUESTIONS FOR THE FOLLOWING PEOPLE]

RTH FIRST NAME LAST NAME FU/HU PERSON# 
DAUGHTER ANICIA HOWE FU M/I 006 
CONTINUE

[OFUM: ANICIA ]

G74. Is she working now, looking for work, retired, a student, keeping house or what? [CHECK ALL THAT APPLY.]

1, WORKING NOW
2, ONLY TEMPORARILY LAID OFF
3, LOOKING FOR WORK, UNEMPLOYED
4, RETIRED
5, DISABLED, PERMANENTLY OR TEMPORARILY
6, KEEPING HOUSE
7, STUDENT
8, OTHER (SPECIFY)
9, DON'T KNOW
Remember that work hours in Section D/E imply income here and vice versa. Make sure Wife's/'Wife's' income from all work sources is recorded, including tips, commissions, or bonuses.

If some or all of the Wife's/'Wife's' income is from work in a business in which she is full or part owner, it may already be included at G5-G11a. If this is the case, enter an [F2] comment "included in business income" and specify the amount. Wife's/'Wife's' business income, regardless of where it is reported, should be the amount after expenses were deducted but before income taxes were paid. Wage and salary amounts, however, should be "before any taxes or deductions."

This screen simply lists all those FU Members considered OFUMs, informing you about which individuals you will ask the OFUM question sequence.

Just like the Head/Wife/'Wife" employment status questions, you may enter as many as apply to the OFUM's current situation.

Note that the fill at the top of the screen reminds you about which OFUM you are asking the questions--this is done throughout the OFUM section.
G76. During 1992, how many full-time or part-time jobs did she have (not counting work around the house)?

1. ONLY ONE JOB
2. TWO JOBS
3. THREE JOBS
4. FOUR JOBS

G77. What kind of work did she usually do? What was her occupation?

G78. About how much money did she earn from that job last year?

IWER: PROBE QUALIFIED ANSWER, RANGE, OR DK:
What's your best estimate?

EARNING FROM JOB: $

RECEIVED PER: HOUR DAY WEEK 2 WEEKS MONTH YEAR OTHER [USE F2 TO RECORD]

G79. About how many weeks did she work on that job last year?

IWER: PROBE QUALIFIED ANSWER, RANGE, OR DK:
What's your best estimate?

USE F2 FOR COMMENT

1 - 97 ACTUAL WEEKS
98 DK
99 REFUSAL
If this person’s employment was irregular, try to get as much information as you can about the number of jobs held. If the OFUM had more than four different jobs in 1992, use an [F2] comment to record the exact number, then select 4 as the response and only collect information on the first four mentions.

We use occupation to help us assign missing income data; please be as specific as possible and probe as you would for occupation information on Head/Wife/'Wife."

Enter dollar amount and correct unit of time for each job.

This figure should be the number of weeks in which any work was done on that job.
GB3. Did she have any (other) income such as pensions, welfare, interest, gifts, or anything else, last year?
1 YES
5 NO

GB8. When did she last attend school?
JAN JUL "winter"
FEB AUG "spring"
MAR SEP "summer"
APR OCT "fall/autumn"
MAY NOV DK
JUN DEC RF

ENTER THE LAST TWO DIGITS OF ACTUAL YEAR (01 - 93)
19
97 BEFORE 1992, DK EXACT YEAR
98 DK YEAR AT ALL
99 REFUSAL

GB9. What is the highest grade or year of school that she has completed?
01 FIRST
02 SECOND
03 THIRD
04 FOURTH
05 FIFTH
06 SIXTH
07 SEVENTH
08 EIGHTH, GRADE SCHOOL
09 NINTH
10 TENTH
11 ELEVENTH
12 TWELVETH, HIGH SCHOOL, GED
13 ONE YEAR COLLEGE

GB9. What is the highest grade or year of school that she has completed?
14 TWO YEARS COLLEGE
15 THREE YEARS COLLEGE
16 GRADUATED, BACHELORS DEGREE
17 AT LEAST ONE YEAR POSTGRADUATE, OR MORE
"Income" in this sequence refers to non-labor income; all income from work should be included at G78, not here.

Retired or disabled adults may have income from pension plans or Supplemental Security Income (SSI). If they received Social Security, and you recorded it back at G31, do not record it again. But, if you missed this Social Security, collect it here.

If R mentions "welfare," ask whether the welfare is ADC, AFDC, or some other kind. Record the explicit source whenever possible in an [F2] comment.

Income from interest, dividends, and trust funds should also be included in this sequence.

These questions about OFUM's education are asked for each 1992 OFUM age 16 to 50.

Highest grade of education completed is asked for every OFUM age 16 or older. When recording the highest grade of school completed, please note that this question spans two screens. Use [F8] to switch to the second screen; you must be on the screen that contains the R's answer in order to enter it.
G99. Did you or anyone else in the family living there get any other money in 1992—like a big settlement from an insurance company, or an inheritance?

1  YES
5  NO

G102. Some people have expenses they can itemize and deduct on their income tax. Did you (HEAD) itemize deductions on your 1992 federal income tax, such as property taxes, interest payments, and charitable contributions?

1  YES
5  NO or DID/WILL NOT FILE

G103. In 1992, did you give any money toward the support of anyone who was not living with you at the time?

1  YES
5  NO

G104. How many people was that?

IWER: 01 - 30 FOR ACTUAL NUMBER, 98 IF DK, 99 IF RF.

G105. Who was the first person?

[STER: ASK THE NAME AND RELATIONSHIP TO THE HEAD]
FIRST NAME:  LAST NAME:
RELATIONSHIP TO HEAD:

G114. Was that person dependent on you for more than half of his/her total support?

1  YES
5  NO
This applies to anyone in the FU, and any kind of money not already covered. If you are not sure whether a sum belongs here, please include it and specify the source in an [F2] comment.

There are two ways of deducting expenses for federal income tax:

1. **the standard deduction** is an amount allowed taxpayers automatically for expenses. Those who file forms 1040EZ or 1040A use the standard deduction.

2. **itemized deductions** are used when the taxpayer's actual amounts exceed the standard deduction amount and they want to take advantage of this. People buying their own homes, for example, would itemize interest and property taxes which are usually greater than the standard deduction.

We are primarily interested in support given by Head/Wife/"Wife", but "you" can mean anyone in the FU. The support must be given in 1992 by anyone in the FU to anyone not in the FU at the time. Examples are: money to grown children away at college, child support for children from a previous marriage, or money to help parents or other relatives not living in the FU.

Regardless of who R is or who in the FU gave the support, we want the name and relationship to Head of each person who received the money. For example, if an OFUM son gave money to his grandfather (i.e., Head's father), the relationship to Head would be entered as "FATHER".

The information from G114 is used in our tax calculation program, so we mean "dependent on you for more than half of their total support" in the same way that the IRS does. In other words, would they be able to claim these persons as dependents on their 1992 income tax return? Again, we are primarily interested in Head/Wife/"Wife", but if another FU Member provided more than half of the support of these dependents, please indicate which OFUM that was (use person number and/or relationship to Head in an [F2] comment) and how many of the dependents in G114 are theirs.
H2. Do you have any physical or nervous condition that limits the type of work or the amount of work you can do?

1. YES
5. NO

HEAD AGE 55 OR OLDER

H6. The next questions are about your ability to do certain activities--by yourself and without special equipment.

Because of a health or physical problem, do you have any difficulty ...

1. bathing or showering?
2. dressing?
3. eating?
4. getting in or out of bed or a chair?
5. walking?
6. getting outside?
7. using the toilet, including getting to the toilet?
8. NO TO ALL OF THE ABOVE
Part 6: Section H—Health

H2

We'd like only work-limiting health problems. That is, problems that limit the kind or amount of work that Head can do on her/his job.

H6

These questions are only asked of Heads who are age 55 or older at the time of the interview. They determine the degree of difficulty the Head may have in performing basic activities of daily living. These have been found to be valuable indicators of the potential need for long-term care, either at home or in an institution.

If necessary, remind the R that these questions refer to performing the activity without help from another person and without using special equipment.

You may have a response to one of these that is "doesn't do." For example, to "Getting outside?" the Head may say "I never go outside. This area is too dangerous." In these instances, provide an [F2] comment of how the Head responded to this item, but do not select that item as a response to the question. However, if the response to an item mentions any health condition which limits their ability to do the activity, select that item as a response. For example, if the Head says "I can't bathe myself. My arthritis is so bad that my daughter has to bathe me," then select bathing or showering as a response.

If the Respondent is a proxy and reports that the Head "can't do anything," "can't even get out of bed," or words to that effect, you still must read all the response categories to confirm whether Head meets the survey definition of totally incapacitated.

Some definitions that may be helpful to you during the interviewing:

- **Bed:** Anything used for lying down or sleeping, including a sofa, cot, or mattress.

- **Getting outside:** Moving from inside to outside the unit, including to a patio, porch, or a building or hallway. It does not imply any real movement or exertion once the person has reached the outside.

- **Special equipment:** Aids or devices used to assist the person in a particular activity, such as a cane, walker, artificial limb, special plates, etc. Also include structural modifications to the home, such as lowered or raised commodes, lowered or raised kitchen equipment, ramps, etc.
H9. The next questions are about doing other activities by yourself. Because of a health or physical problem, do you have any difficulty preparing your own meals?

1 YES
5 NO
7 DOESN'T DO

H11. (Do you have any difficulty) shopping for personal toilet items or medicines?

1 YES
5 NO
7 DOESN'T DO

H13. (Do you have any difficulty) managing your own money, such as keeping track of expenses or paying bills?

1 YES
5 NO
7 DOESN'T DO

H15. (Do you have any difficulty) using the telephone?

1 YES
5 NO
7 DOESN'T DO

H17. (Do you have any difficulty) doing heavy housework, like scrubbing floors or washing windows?

1 YES
5 NO
7 DOESN'T DO

H19. (Do you have any difficulty) doing light housework, like doing dishes, straightening up, or light housecleaning?

1 YES
5 NO
7 DOESN'T DO
These questions determine the degree of difficulty the Head may have in performing instrumental activities of daily living. The general instructions provided for H6 also apply here. Note, however, one important difference. H9-19 refer to the Head performing these activities by herself/himself. Unlike H6, the special qualifier "without using special equipment" is not included in these questions. If Head is able to perform these activities by herself/himself, regardless of whether or not special equipment or aids are used, then do not consider this person as having difficulty. Do not, however, probe to determine this.

This question sequence is not asked for Heads who are currently in a nursing home or other institution or confirmed as being unable to do anything.
INTERVIEWER:

ARIZONA RESPONDENTS MAY MENTION ARIZONA HEALTH CARE COST CONTAINMENT SYSTEM (AHCCCS), WHICH IS EQUIVALENT TO MEDICAID.

CALIFORNIA RESPONDENTS CALL MEDICAID "MEDI-CAL".

H25. Is anyone in your family living there covered by (Medicaid or Medical Assistance/Medi-Cal)?

[DO NOT INCLUDE MEDICARE]

1 YES
5 NO

H26. Who is covered?

[INTER: USE [F3] TO CHANGE "NO" TO "YES" IF THE PERSON IS COVERED]

<table>
<thead>
<tr>
<th>FIRST NAME</th>
<th>LAST NAME</th>
<th>RELATION</th>
<th>COVERED</th>
</tr>
</thead>
<tbody>
<tr>
<td>MARSHALL</td>
<td>MURKLE</td>
<td>MALE HEAD</td>
<td>NO</td>
</tr>
<tr>
<td>EMMA</td>
<td>MURKLE</td>
<td>WIFE</td>
<td>NO</td>
</tr>
<tr>
<td>MARY</td>
<td>MURKLE</td>
<td>DAUGHTER</td>
<td>NO</td>
</tr>
<tr>
<td>SHIRLEY</td>
<td>MURKLE</td>
<td>DAUGHTER</td>
<td>NO</td>
</tr>
<tr>
<td>FADETTA</td>
<td>MURKLE</td>
<td>GRANDDAUGHTER</td>
<td>NO</td>
</tr>
</tbody>
</table>

CONTINUE

H28. Now I have a few questions about EMMA's health. Would you say her health in general is excellent, very good, good, fair, or poor?

1 EXCELLENT
2 VERY GOOD
3 GOOD
4 FAIR
5 POOR
We'd like to know if any FU Member gets Medicaid coverage. Medicaid is not private or employer provided insurance such as Blue Cross-Blue Shield—it is for low-income people who must meet eligibility requirements.

Unlike the Medicare program administered by the federal government, Medicaid is administered by states and has different names in different states. In most states it is called Medicaid and is administered through the state or county medical assistance department. However, it may also be called Medi-Cal (in California) or Medical Assistance from Welfare. Arizona has a new term for it: Arizona Health Care Cost Containment System (AHCCCS). A medical assistance program may be in the form of an HMO, but it must be administered by the state or county medical assistance or welfare departments, not a private or employer HMO plan.

Remember, no Medicare here.

For each covered FU Member, place your cursor in the COVERED column and use [F3] to change NO to YES.

This is R's broad assessment of Wife's/Wife's health.

From this point, for all Wives/Wives age 55 or older, the same sequence of health questions are asked as were asked regarding the Head. The same rules and definitions for H1-24 apply to these questions.
H53. Now about the rest of your family living there--are any family members there under age 55 not in good health?

1  YES
5  NO

H54. Who is that?

[IF THE PERSON IS NOT IN GOOD HEALTH]

<table>
<thead>
<tr>
<th>FIRST NAME</th>
<th>LAST NAME</th>
<th>RTH</th>
<th>NOT IN GOOD HEALTH</th>
</tr>
</thead>
<tbody>
<tr>
<td>MARY</td>
<td>CAPLE</td>
<td>DAUGHTER</td>
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<tr>
<td>SHIRLEY</td>
<td>CAPLE</td>
<td>DAUGHTER</td>
<td>NO</td>
</tr>
<tr>
<td>FADETTA</td>
<td>CAPLE</td>
<td>GRANDDAUGHTER</td>
<td>NO</td>
</tr>
</tbody>
</table>

CONTINUE
For other FU Members (not Head/Wife/"Wife") under age 55 who are not in good health, use [F3] in the NOT IN GOOD HEALTH column to change NO to YES.
Next we have questions about health care. This is a topic attracting national attention, and we are interested in learning more about the medical costs and help in covering them. Our questions are mostly about people living there who are 65 or older and parents and parents-in-law (of KATIE) who are 65 or older, whether or not they live there.

When we ask about the amount of costs or help with costs, we know it can be difficult to calculate or recall exact amounts, so just tell me your best estimate. If we ask about help covering someone's medical cost, please keep in mind that children, other relatives, or friends could help cover a person's cost either by paying the cost directly or by giving the person money to pay the cost. We would like you to count both as help covering the medical cost.

HOME-BASED CARE
S1. At any time during 1992 did you have a paid nurse or home health-care worker come to your home to help you with health-related or personal needs?

1 YES
5 NO

HOME-BASED CARE
S1b. Now thinking of the cost of the home health care you received in 1992, after Medicare, Medicaid and other insurance pay what they're supposed to, does the remainder total $200 or more?

HOME-BASED CARE
S1g. Did anyone help cover the cost?

1 YES
5 NO

HOME-BASED CARE
S1h. Thinking about everyone who provided the help, who helped the most? What is his/her relationship to you? (Anyone else?)

[PROBE FOR NAME AND RELATIONSHIP TO HEAD]

[USE F3 TO SELECT RELATIONSHIP, F10 TO FINISH ENTRY]

1ST NAME
1ST RELATIONSHIP TO HEAD

2ND NAME
2ND RELATIONSHIP TO HEAD

3RD NAME
3RD RELATIONSHIP TO HEAD
Part 7: Sections S&P—Health and Transfers Supplements and Medicare Permission

The questions in Section S are asked about Heads, Wives/"Wives", non-parent OFUMs and those who moved out or died since the last interview, who are age 55 and over. Most questions are concerned with those who are age 65 and over; only a small subset of the questions are asked about those aged 55-64. The focus of this supplement is on (1) the major health events of the elderly which include home-based health care, nursing home care, and other major health care, (2) medical expenditures for the elderly, and (3) financial and time help received by the elderly.

In this section we do ask for names. These names will be removed from the data set as soon as the interview reaches the study staff. If needed, reassure Rs that we will protect their privacy. If R gives you only a first name, do not probe for a last name.

S1
Here we are interested only in home-based health care services provided by someone for monetary reimbursement. Also include cases where no cash is received but the helper gets pay-in-kind or room and board regularly for helping. Do not include help here that is a relative or friend who provides the help but does not receive monetary reimbursement or pay-in-kind services. The care reported here must be only that received in 1992.

S1b
The response to this question gives us a rough estimate of the total non-reimbursed out-of-pocket costs for the care, including those covered by a relative or friend. Also include here any outstanding bills for services received in 1992, even if the bills have not been paid. The receipt of a health-related bill often lags far behind the time the service is rendered. Many times this is because the bill goes first to Medicare/Medicaid/other insurance for them to pay their part, and this can take several months. Even if they do not yet have their final bill, they may have a rough idea of how much they are likely to be billed, and it is that amount that we want to know.

S1g-h
The purpose here is to try to identify one person who helped the most. If the Respondent cannot isolate such a person, accept names for those who helped equally (up to 3 persons). We ask names here so that we can match them to persons already in our study. Accept whatever name R gives; do not probe for complete name. We want the relationship to the person who was helped, not necessarily the relationship to Head as it is in most other places in the questionnaire. (The objectives of these questions are repeated in S2g-S2h, S3g-S3h, and S5g-S5h.)
NURSING HOME CARE

PERSON(S) HELPED MOST:

1ST NAME: John       RELATIONSHIP: BROTHER

$1p. About how much did the help from (1st NAME+2nd NAME+3rd NAME) total?

ENTER 999998 FOR DK.

NURSING HOME CARE

$2. Did you live in a nursing home at any time during 1992?

Definition: A NURSING HOME IS A PLACE WHERE PEOPLE STAY WHEN THEY NEED NURSING CARE, BUT DON'T NEED TO BE IN A HOSPITAL. SOMETIMES CALLED A SKILLED OR INTER-MEDIATE CARE FACILITY.

1  YES
5  NO

NURSING HOME CARE

$s2ab. Had you lived in a nursing home at any time before January 1, 1992?

1  YES
5  NO

NURSING HOME CARE

$s2ac. Now thinking only about the nursing home care in 1992, how many weeks or months in total did you receive that care?

[ENTER 99 FOR DK TOTAL AMOUNT]

TOTAL IN 1992:

WEEKS
MONTHS
DK
S1p Count the total amount of help from all persons reported in S1h, if more than one person is reported.

S2 Nursing homes are institutions primarily for people who need constant nursing supervision or are incapable of living independently. Nursing supervision must be provided on a continuous basis for the institution to qualify as a nursing home. Do not include stays in adult foster care facilities or other short-term stays in a hospital. However, do include stays in a nursing home that is part of a hospital. Some hospitals now provide nursing home facilities in a separate wing or floor of the building. The facilities are to be considered a nursing home and not part of the hospital. The amount of time spent in the nursing home is to be counted separately from that in the hospital, even if the reason for the nursing home stay and the hospital stay were identical.

S2ab-ac Please pay close attention to the time references in these questions. S2ac refers only to the length of nursing home stays in 1992, even though the previous question (S2ab) asks about nursing home stays before 1992.
OTHER HEALTH CARE

$3. Now about other health-related costs such as prescription medications, doctor visits, special equipment or health-related changes to a house. Did those costs for you total $200 or more during 1992?

Definition: SPECIAL EQUIPMENT INCLUDES ATTACHMENTS TO THE BODY SUCH AS A LEG BRACE, BACK BRACE, OR ARTIFICIAL LIMB; OBJECTS SUCH AS A WHEELCHAIR OR HEARING AID; OR MODIFICATIONS TO APPLIANCES, VEHICLES, OR THE HOME SUCH AS RAISED TOILETS, RAMPS, AND HANDRAILS.

1 YES
5 NO

OTHER HEALTH CARE

$5g. Did anyone help cover the cost?

THIS REFERS TO ALL OTHER HEALTH-RELATED COSTS, NOT JUST PRESCRIPTION MEDICATION.

1 YES
5 NO

SUMMARY AMOUNT

$SUM. You have told me that your health-related expenses in 1992 were substantial. Did you have to sell assets, withdraw money that normally would not be touched or do anything else special to find the money to pay for those expenses?

[ENTER ALL THAT APPLY]

1, YES, SOLD ASSETS
2, YES, WITHDREW MONEY
5, DID NOT DO ANYTHING SPECIAL
7, YES, OTHER (SPECIFY)

TIME HELP: HEALTH

PERSON(S) HELPED MOST:

1ST NAME: john RELATIONSHIP: BROTHER

$5p. About how many hours did the help from (1st NAME/2nd NAME/3rd NAME) total?

ENTER 9998 FOR DK.

162
S3-3g  The costs in S3g refer to all other health-related costs reported in S3, including those for prescription medication.

Ssum  This question is asked only when the total expenses reported for home-bases care (in S1v), nursing home care (S2v) and other major health care costs for Head and Wife/"Wife" or for each OFUM are more than $1000. The emphasis here is whether any special measures had to be taken to pay for the medical expenses.

S5p  Include time help from all those reported at S5h (see S1h).
MONEY HELP: OTHER

OFUMS12. Now I have a question about money, property, or financial assistance received from others. Not counting health-related help, any shared food, or shared housing, did you (and your family) receive $200 or more from a friend or a relative in 1992?

COUNT THE MONEY VALUE OF ANY PROPERTY THAT WAS GIVEN, THE PAYING OF BILLS THAT ARE NOT HEALTH-RELATED, AND THE COVERING OF SPECIFIC TYPES OF COSTS SUCH AS HOME MAINTENANCE, RENT, ETC. THE FINANCIAL ASSISTANCE CAN BE CONSIDERED SUPPORT, A GIFT OR A LOAN.

1 YES
5 NO
This is a family-specific question, asked once for each Family Unit. If there are any parents in the FU, this question will be deferred until all questions about parents are asked in the Parent Health and Transfers Supplement (Section P) to avoid double counting the financial help received by the FU members. These loans, gifts, and support need not be actual cash. Household appliances, furniture, autos, etc. count here, as well as actual money. The total value of all these things must amount to at least $200.
HOME-BASED CARE

P1. At any time during 1992 did any of your or your wife's parents have a paid nurse or home health-care worker come to their homes to help them with health-related or personal needs?
1 YES
5 NO

HOME-BASED CARE (FOR HEAD'S FATHER)

P1b. Now thinking of the cost of the home health care your father received in 1992, after Medicare, Medicaid and other insurance pay what they're supposed to, does the remainder total $200 or more?
1 YES
5 NO

HOME-BASED CARE (FOR HEAD'S MOTHER)

P1h. Thinking about everyone who provided the help, who helped the most? What is his/her relationship to your mother?

[PROBE FOR NAME AND RELATIONSHIP TO HEAD'S MOTHER]

[USE F3 TO SELECT RELATIONSHIP, F10 TO FINISH ENTRY]

1ST NAME
1ST RELATIONSHIP TO HEAD'S MOTHER

2ND NAME
2ND RELATIONSHIP TO HEAD'S MOTHER

3RD NAME
3RD RELATIONSHIP TO HEAD'S MOTHER

HOME-BASED CARE

HEAD'S NAME: GWENDOLYN KING

PERSON(S) HELPED MOST:

1ST NAME: john RELATIONSHIP: SON

P1p. About how much did the help from (1st Name+2nd Name+3rd Name) total?

166
The questions in Section P are asked of biological and adoptive parents of Head/Wife/"Wife" who are still alive or who have died since the last interview, and are age 55 or older by the time of the 1993 interview. These parents can be FU Members, HU Members, or can be living somewhere else. Most questions are concerned with parents who are age 65 and above; only a small subset of these questions are asked about parents who are age 55-64.

The focus of the 1993 Health and Transfers Supplement for Parents is on major health events, medical expenses of the elderly parents, and time and money assistance parents received from Head/Wife/"Wife" and others. The questions asked in this section are based on information you collect about which parents of Head/Wife/"Wife" are eligible. For each parent indicated, the same set of questions are asked.

**P1**

Here we are interested only in home-based health care services provided by someone for monetary reimbursement. Also include cases where no cash is received but the helper gets pay-in-kind or room and board regularly for helping. Do not include help here that is a relative or friend who provides the help but does not receive monetary reimbursement or pay-in-kind services. The care reported here must be only that received in 1992.

**P1b**

This question gives us a rough estimate of the total non-reimbursed out-of-pocket costs for the care, including those covered by a relative or friend. Also include here any outstanding bills for services received in 1992, even if the bills have not been paid (same for P2b, P3, S1b, S2b, and S3).

**P1h**

The purpose here is to try to identify the one person who helped the most. If the respondent cannot isolate such a person, accept names for those who helped equally (up to 3 persons). We ask names here so that we can match them to persons already in our study. Accept whatever name R gives; do not probe for complete name. We want the relationship to the person who was helped—not the relationship to Head, as in most other places in the questionnaire. The person(s) reported here could be the Head/Wife/"Wife" or others (same for P2h, P3h, and P5h).

**P1p**

Count the total amount of help from all persons reported in P1h, if more than one person is reported (same for P2p and P3p).
HOME-BASED CARE
P1u. What is the relationship of each of those persons to your mother?

1ST RELATIONSHIP TO HEAD'S MOTHER

2ND RELATIONSHIP TO HEAD'S MOTHER

3RD RELATIONSHIP TO HEAD'S MOTHER

- HUSBAND
- EX-HUSBAND
- EX-WIFE
- DECEASED HUSBAND
- DECEASED WIFE
- "WIFE"
- BOYFRIEND

HOME-BASED CARE
P1v. About how much of the cost will your mother end up paying?

[ENTER 999998 FOR DK]

NURSING HOME CARE
P2. Did any of your or your wife's parents live in a nursing home at any time during 1992?

Definition: A NURSING HOME IS A PLACE WHERE PEOPLE STAY WHEN THEY NEED NURSING CARE, BUT DON'T NEED TO BE IN A HOSPITAL. SOMETIMES CALLED A SKILLED OR INTER-MEDIATE CARE FACILITY.

1 YES

NURSING HOME CARE (FOR WIFE'S MOTHER)
P2ac. Now thinking only about the nursing home care in 1992, how many weeks or months in total did your wife's mother receive that care?

[ENTER 99 FOR DK TOTAL AMOUNT]

TOTAL IN 1992:

WEKS
MONTHS
DK

168
For any others helped, record only the relationship to the parent who was helped but not the names here.

This question is meant to find out how much the parent her/himself had to pay after subtracting all the assistance from others reported in P1g-P1u (same for P2v, P3v and P5v).

Nursing homes are institutions primarily for people who need constant nursing supervision or are incapable of living independently. Nursing supervision must be provided on a continuous basis for the institution to qualify as a nursing home. Do not include stays in adult foster care facilities or other short-term stays in a hospital. However, do include stays in a nursing home that is part of a hospital. Some hospitals now provide nursing home facilities in a separate wing or floor of the building. The facilities are to be considered a nursing home and not part of the hospital.

The amount of time spent in the nursing home is to be counted separately from that in the hospital, even if the reason for the nursing home stay and the hospital stay were identical.

Please pay careful attention to the time reference in this question. It refers only to the length of nursing home stays in 1992, even though the previous question (P2ab) asks about nursing home stays before 1992.
OTHER HEALTH CARE

P3. Now I have a question about other health-related costs such as prescription medications, doctor visits, special equipment or health-related changes to a house. Did those costs for any of your or your wife's parents total $200 or more during 1992?

Definition: SPECIAL EQUIPMENT INCLUDES ATTACHMENTS TO THE BODY SUCH AS A LEG BRACE, BACK BRACE, OR ARTIFICIAL LIMB; OBJECTS SUCH AS A WHEELCHAIR OR HEARING AID; OR MODIFICATIONS TO APPLIANCES, VEHICLES, OR THE HOME SUCH AS RAISED TOILETS, RAMPS, AND HANDRAILS.

1 YES
5 NO

OTHER HEALTH CARE (FOR HEAD'S MOTHER)

P3g. Did anyone else help cover the cost?

1 YES
5 NO

TIME HELP: HEALTH

P5. Now I have a question about help from people not paid for the time they spend helping. At any time during 1992, did any of your or your wife's parents have anyone who was not a paid helper come to their homes to help them with health-related or personal needs such as dressing, eating or bathing?

1 YES
5 NO

TIME HELP: HEALTH (FOR HEAD'S FATHER)

P5b. Thinking about help given to your father, did you or your wife spend any time in 1992 helping him with health-related or personal needs?

1 YES
5 NO

TIME HELP: HEALTH (FOR HEAD'S FATHER)

P5c. Was that you or your wife or both who spent time helping?

[ENTER ALL THAT APPLY]

1, HEAD
2, WIFE/WIFE

TIME HELP: HEALTH (FOR HEAD'S FATHER)

P5d. (Thinking only about the help from you), how many hours did you spend?

[ENTER 9998 FOR DK]
P3-3g  Include all health-related costs here, including prescription medication.

P5-5d  This question sequence helps us determine first whether parents had non-paid help for any health-related or personal needs, then how many hours Head/Wife/"Wife" helped the parents respectively. When both Head and Wife/"Wife" helped, obtain hours helped by each separately. (Same for P6-P6d.)
P7. Now I have a question about giving any other money, property, or financial assistance. Aside from any health-related help, any shared food, or shared housing, did you and your wife give any of your or your wife's parents $200 or more in 1992?

COUNT THE MONEY VALUE OF ANY PROPERTY THAT WAS GIVEN, THE PAYING OF BILLS THAT ARE NOT HEALTH-RELATED, AND THE COVERING OF SPECIFIC TYPES OF COSTS SUCH AS HOME MAINTENANCE, RENT, ETC. THE FINANCIAL ASSISTANCE CAN BE CONSIDERED SUPPORT, A GIFT OR A LOAN.

1 YES
5 NO

P9. Think about all the different types of help we have talked about that you and your wife gave to a parent (or a parent in-law) in 1992. Did giving that help mean that you had to increase or decrease the hours you worked at a job for pay?

[PROBE FOR INCREASE OR DECREASE]

1 YES, INCREASED HOURS WORKED
2 YES, DECREASED HOURS WORKED
5 DID NOT CHANGE HOURS WORKED

P10. Did it mean that your wife had to increase or decrease the hours she worked at a job for pay?

[PROBE FOR INCREASE OR DECREASE]

1 YES, INCREASED HOURS WORKED
2 YES, DECREASED HOURS WORKED
5 DID NOT CHANGE HOURS WORKED

P12. Now I have a question about receiving any other money, property or financial assistance from others. Not counting health-related help, any shared food, or shared housing, in 1992 did you and your family there receive $200 or more from a friend or a relative?

1 YES
5 NO
This is a family-specific question, asked once for Head’s parents and once for Wife’s/"Wife’s" parents. These loans, gifts, and support need not be actual cash. Household appliances, furniture, autos, etc. count here, as well as actual money. The total value of all these things must amount to at least $200.

This question is an attempt to find out if the Head had to change her/his work hours in order to provide either time or money assistance to any of her/his elderly parents or parents-in-law.

This is the equivalent question of P9 for the Wife/"Wife".

This question is the equivalence of S12 in the supplement for Head/Wife/"Wife". This is a family specific question, asked once for each family unit. It is asked here only if there are any parents in the FU.
IWER CHECKPOINT:

**MED1.** IS THE NAME OF RESPONDENT MARSHALL MURKLE?

1. YES
2. NO

**MED3.** Now, I have a question about Medicare benefits. In previous years, MARSHALL gave us permission to obtain information from Medicare about medical bills Medicare paid on his behalf. We want to continue this as part of our study of how medical care expenditures affect family budgets. My instruction is to obtain the permission personally from him. I only need to ask him one question and then we will continue the rest of the interview with you for a few more questions. May I please speak to MARSHALL?

   IF THE PERSON YOU NEED TO SPEAK TO IS NOT AVAILABLE, FILL OUT A MEDICARE CALL BACK FORM. THEN SELECT 7 AND [ENTER] TO LEAVE THIS SCREEN.

1. YES
7. NOT AVAILABLE

IWER: YOUR MUST BE SPEAKING TO MARSHALL MURKLE.

**MED4.** Hello, I am (IWER NAME) from the Study of Family Economics at the University of Michigan.

In previous years, you gave us permission to obtain information from Medicare about medical bills Medicare paid on your behalf. We want to continue this as part of our study of how medical care expenditures affect family budgets.

May we have your permission to collect information from Medicare regarding the bills they pay on your behalf for your medical expenses in 1993 and 1994?

1. YES
5. NO

**MED5.** Thank you for your help. May I speak to (R's Name) again for a few more questions please?

   IF YOUR RESPONDENT IS NOT AVAILABLE, SUSPEND CASE AND SET APPOINTMENT.
The Medicare Permission questions request permission from specified FU Members for the PSID to obtain information about Medicare expenditures made on their behalf by the Health Care Financing Administration (HCFA). The data received from HCFA will be summarized and made available under special contractual conditions to researchers interested in the inter-relationships among age, income, occupation, ethnicity, gender, health and disability status, and medical care expenditures.

Only a relatively small subset of persons (about 800) will be asked these questions: those who are eligible to receive Medicare benefits and who have given us permission to obtain this information during their 1990-1992 interviews. There may be up to two such persons in an FU.

The Medicare Permission questions must be asked directly to the persons regarding whose Medicare benefits we want to obtain information. Although in the great majority of cases this will be the Respondent, there will be some cases where you will need to ask another person or persons to come to the phone.

Be sure to speak directly to the person for whom the permission is to be obtained whenever that person can possibly be spoken to. You may find that a Respondent will want to try to answer on behalf of their spouse, but this should not be accepted unless the person who should be asked directly is physically or mentally incapacitated. In such cases, you may ask the question and accept an answer from the person (usually a spouse or adult child) who has power of attorney for, or is guardian of, the person who is physically or mentally impaired. Please record an [F2] comment explaining the situation.

If the person who should be asked the Medicare Permission question is temporarily unavailable (e.g., out of the home on an errand), complete a PSID Medicare Question Form for use in a later callback, complete the interview, and file the Medicare Question Form in the Project Manager box (please see TelFac Forms for an example and instructions on how to complete the form).
J2. We are updating the information we collected last year. Have you and your husband had any children since January 1992? (DO NOT COUNT STILLBIRTHS, STEPCHILDREN, OR ADOPTED CHILDREN)

1 YES
5 NO

J3. How many is that?

01-05. ACTUAL NUMBER OF OWN CHILDREN
98. DK
99. RF

CHILD #3

J61/J62. What is the next child's name?

J63-OS1. Let's talk about Bill. Was the baby a boy or a girl?

1 BOY
2 GIRL
Part 8: Section J—Marriage and Children

Section J collects information on births, adoptions, and marriages for the Head, Wife/"Wife," and OFUMs. In this section, we do ask for the names of children and spouses. These names will be removed from the data set as soon as the interview reaches the study staff. If needed, reassure Rs that we will protect their privacy. We are asking for names only to help us clarify family relationships among the family members. If R gives you only a first name, do not probe for a last name.

J2 Both Head and Wife should be the natural parents of any children reported here.

Note: For all the questions on births/adoptions of children, different question sequences are followed depending on the FU composition. If Head and Wife are the same this year as last year, one sequence is followed. If there is a New Head or New Wife in the FU, a different sequence is followed. If there is a "Wife" in the FU, still another sequence is followed. We have reproduced here examples of all questions, but not from each individual sequence. The important thing for you as interviewers is to become familiar with what each question is asking, regardless of which sequence it is in or the question number with which it is labeled (we've included question numbers here in the QxQs to help you match the text with each question).

J3 Depending on how many children the R reports, CATI will ask the same question sequence for each of them.

J61/J62 As mentioned above, please do not probe for complete names if the R does not provide them.

J63-OS1 Since the answer to this question is usually (but not always!) quite obvious, you may confirm the gender of the child with the R. Please do not enter the child’s gender without at least a confirmation from the R.
J63-0S2. In what month and year was he born?

JAN  JUL  "Winter"
FEB  AUG  "Spring"
MAR  SEP  "Summer"
APR  OCT  "Fall/Autumn"
MAY  NOV  DK MONTH
JUN  DEC  REFUSAL

ENTER THE LAST TWO DIGITS OF ACTUAL YEAR (01-93)

19

96  1992 OR 1993 BUT DO NOT KNOW WHICH
97  BEFORE 1992, DK EXACT YEAR
98  DK YEAR AT ALL
99  REFUSAL

J63-0S3. How much did he weigh at birth?

ENTER: 98 IF DK, 99 IF RF.

pounds and ounces

J63-0S4. Is Bill living with you now, away with his mother, with some other relative, or what?

1  LIVING IN FU/HU NOW
3  LIVING WITH MOTHER
4  LIVING WITH OTHER RELATIVE
6  DECEASED
7  OTHER(SPECIFY)

J7. Have you and your husband legally adopted any children since January 1992?

1  YES
5  NO
If the R doesn’t know the month of birth, probe for the season. If this question were being asked of a child of a Head and Wife who were Head and Wife of this FU last year, 1992 and 1993 would be the only years available for selection.

Please enter both pounds and ounces, if the R can provide that information.

We want to know where this child resides now or whether she or he is deceased. The OTHER category is for children who are neither living in the FU/HU, with another relative, in their own home, nor deceased—for example, children away at college, in the armed services, or institutionalized. Please specify where these children are.

If any children have been adopted in 1992 or 1993, this sequence will ask about them. Only children whose adoptions have been finalized should be included here. Sometimes Rs confuse adoptions with legal custody; usually this confusion happens when the Head or Wife are the "adoptee’s" grandparents or other relatives. If necessary, probe such cases to find out if this is a real legal adoption.
J127. Now I am going to ask you some questions about marriage and children for other family members living there who are age 12 through 44.

J149. How many children has ANICIA HOWE ever given birth to?

[DO NOT COUNT STILLBIRTHS, STEPCHILDREN, OR ADOPTED CHILDREN]

00. NONE
01-35. ACTUAL NUMBER OF OWN CHILDREN
98. DK
99. RF
We ask complete marriage and child histories, where applicable, for all OFUMs who are age 12 through 44. These questions are asked even if they have been OFUMs in other years and we already have this information. These questions are not just updates.

This is an example of an OFUM "marriage and children" sequence question.

Marital status and births/adoptions are asked for each eligible OFUM, with the OFUM's name filled into each question so it is easy for both you and the R to reference the correct person.
**BACKGROUND AND EDUCATION OF NEW WIFE/WIFE**

**K2.** Now I have some questions about your wife's family and past experiences. How much education did her father have?

- [ ] 1. 0-5 GRADES
- [ ] 2. 6-8 GRADES/"GRADE SCHOOL"
- [ ] 3. 9-11 GRADES/JUNIOR HIGH
- [ ] 4. 12 GRADES/"HIGH SCHOOL"
- [ ] 5. 12 GRADES PLUS NON-ACADEMIC TRAINING
- [ ] 6. SOME COLLEGE/ASSOCIATE'S DEGREE
- [ ] 7. COLLEGE/BACHELOR'S DEGREE
- [ ] 8. COLLEGE, GRADUATE WORK/PH.D/PROFESSIONAL DEGREE
- [ ] 9. DK/RF

**K4.** How much education did her mother have?

- [ ] 1. 0-5 GRADES
- [ ] 2. 6-8 GRADES/"GRADE SCHOOL"
- [ ] 3. 9-11 GRADES/JUNIOR HIGH
- [ ] 4. 12 GRADES/"HIGH SCHOOL"
- [ ] 5. 12 GRADES PLUS NON-ACADEMIC TRAINING
- [ ] 6. SOME COLLEGE/ASSOCIATE'S DEGREE
- [ ] 7. COLLEGE/BACHELOR'S DEGREE
- [ ] 8. COLLEGE, GRADUATE WORK/PH.D/PROFESSIONAL DEGREE
- [ ] 9. DK/RF
Part 9: Section K—Background and Education of New Wife/"Wife"

K2 If Wife/"Wife" did not have a father, ask this question about the male who was stepfather or guardian, if any.

K4 If she had numerous guardians other than parents while growing up, ask about those with whom she lived longest. ACCEPT MOTHER/FATHER SUBSTITUTE means if she was raised by anyone in place of a parent, ask these questions about the man and/or woman who raised her, and explain the situation in an [F2] comment.
**K6.** How I have some questions about brothers and sisters. Did your wife have any brothers?  
[INCLUDE NATURAL SIBLINGS ONLY]

<table>
<thead>
<tr>
<th></th>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**K7.** How many brothers was that?

[CODE ACTUAL TOTAL NUMBER (01-35), 98 IF DK, 99 IF RF]

<table>
<thead>
<tr>
<th></th>
<th>CODE ACTUAL TOTAL NUMBER (01-35), 98 IF DK, 99 IF RF</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tr>
</tbody>
</table>

**K10.** How many of them are still living?

[CODE ACTUAL TOTAL NUMBER STILL LIVING (01-35), EXCEPT:]

<table>
<thead>
<tr>
<th></th>
<th>CODE ACTUAL TOTAL NUMBER STILL LIVING (01-35), EXCEPT:</th>
</tr>
</thead>
<tbody>
<tr>
<td>00</td>
<td>NONE</td>
</tr>
<tr>
<td>96</td>
<td>ALL</td>
</tr>
<tr>
<td>98</td>
<td>DK</td>
</tr>
<tr>
<td>99</td>
<td>RF</td>
</tr>
</tbody>
</table>

**K11.** Were any of her brothers older than she is?

<table>
<thead>
<tr>
<th></th>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**K12.** Did she have any sisters?  
[INCLUDE NATURAL SIBLINGS ONLY]

<table>
<thead>
<tr>
<th></th>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

184
We're asking about Wife's/"Wife's" natural brothers and sisters, including half-brothers and half-sisters, but not brother/sister substitutes (like cousins or adopted/step sisters/brothers).
K18. In order to get an idea of the different races and ethnic groups that participate in the study, I would like to ask you about your wife's ethnic origin. Is she of Spanish or Hispanic descent, that is, Mexican, Mexican American, Chicano, Puerto Rican, Cuban, or other Spanish? [IF NECESSARY: Which one?]

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>IS NOT SPANISH/HISPANIC</td>
</tr>
<tr>
<td>1</td>
<td>MEXICAN</td>
</tr>
<tr>
<td>2</td>
<td>MEXICAN AMERICAN</td>
</tr>
<tr>
<td>3</td>
<td>CHICANO</td>
</tr>
<tr>
<td>4</td>
<td>PUERTO RICAN</td>
</tr>
<tr>
<td>5</td>
<td>CUBAN</td>
</tr>
<tr>
<td>6</td>
<td>COMBINATION OF 1-5</td>
</tr>
<tr>
<td>7</td>
<td>OTHER SPANISH(SPECIFY)</td>
</tr>
</tbody>
</table>

K19. And, is she white, black, American Indian, Aleut, Eskimo, Asian, Pacific Islander, or another race? [ENTER ALL THAT APPLY]

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>WHITE</td>
</tr>
<tr>
<td>2</td>
<td>BLACK</td>
</tr>
<tr>
<td>3</td>
<td>AMERICAN INDIAN, ALEUT, ESKIMO</td>
</tr>
<tr>
<td>4</td>
<td>ASIAN, PACIFIC ISLANDER</td>
</tr>
<tr>
<td>5</td>
<td>LATINO origin or descent</td>
</tr>
</tbody>
</table>

K21. Now I would like to talk about the education your wife has received. Did she graduate from high school, get a GED, or neither?

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>GRADUATED FROM HIGH SCHOOL</td>
</tr>
<tr>
<td>2</td>
<td>GOT A GED</td>
</tr>
<tr>
<td>3</td>
<td>NEITHER</td>
</tr>
</tbody>
</table>

K22. In what year did she graduate?

ENTER THE LAST TWO DIGITS OF ACTUAL YEAR GRADUATED (01-93)

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>19</td>
<td></td>
</tr>
<tr>
<td>01-93</td>
<td>EXACT YEAR</td>
</tr>
<tr>
<td>97</td>
<td>BEFORE 1901</td>
</tr>
<tr>
<td>98</td>
<td>DK YEAR AT ALL</td>
</tr>
<tr>
<td>99</td>
<td>REFUSAL</td>
</tr>
</tbody>
</table>
We are interested in whether she has any Hispanic origins, but primarily in the groups named in the first five response categories. If any of these are mentioned, be sure to select them (if R mentions more than one of the first five categories, select 6 Combination of 1-5). The Other Spanish code should be used only for a Hispanic group other than these five or an unspecified Hispanic or Latino answer.

If R says YES and doesn't specify a Hispanic group, or says only "Latino" or "Spanish," ask "Which Hispanic group is that?"

Take whatever race R names here and do not question it. If R says ANOTHER RACE, ask "Which race is that?" and record the complete response (in [F2] if it doesn't fit the specified categories).

A GED means Wife/Wife" took an exam to earn a diploma that is the equivalent of a high school diploma. *GED* stands for General Equivalency Diploma.

If older Rs have problems remembering the year the Wife/Wife" finished school, probe for as much as she/he can remember (around what year or decade was it?) and record responses in an [F2] comment.
K28. Did she attend college?
1 YES
5 NO

K29. In what year did she last attend college?

ENTER THE LAST TWO DIGITS OF YEAR LAST ATTENDED COLLEGE (01-93)

19

01-93 EXACT YEAR
96 STILL IN SCHOOL
97 BEFORE 1901
98 DK YEAR AT ALL
99 REFUSAL

K30. What is the highest year of college she has completed?
0 LESS THAN ONE YEAR
1 ONE YEAR
2 TWO YEARS
3 THREE YEARS
4 FOUR YEARS
5 FIVE OR MORE YEARS

K31. Did she receive a college degree?
1 YES
5 NO

K32. What is the highest college degree she has received?

01 ASSOCIATE'S/AA
02 BACHELOR'S/BA/BS
03 MASTER'S/MA/MS/MBA
04 DOCTORATE/PhD
05 LLB, JD (LAW DEGREES)
06 MD, DDS, DVM, DO (MEDICAL DEGREES)
08 HONORARY DEGREE
97 OTHER(SPECIFY)

K35. In what year did she receive that degree?

ENTER THE LAST TWO DIGITS OF YEAR RECEIVED THAT DEGREE (01-93)

19

01-93 EXACT YEAR
97 BEFORE 1901
98 DK YEAR AT ALL
99 REFUSAL
This information is used to compare how people with different kinds of degrees from various types of higher education institutions do economically. "College" includes junior/community colleges, universities, and graduate school. At K32-35, we want information about Wife's/"Wife's" highest degree, which may not be the same as her last degree, or the last college attended.
**K36.** Did your wife receive any other degree or a certificate through a vocational school, a training school, or an apprenticeship program?

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>YES</td>
</tr>
<tr>
<td>5</td>
<td>NO</td>
</tr>
</tbody>
</table>

**[FIRST OTHER DEGREE/CERTIFICATE]**

**K37.** What type of degree or certificate was that?

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>DEGREE</td>
</tr>
<tr>
<td>2</td>
<td>CERTIFICATE</td>
</tr>
<tr>
<td>3</td>
<td>LICENSE</td>
</tr>
<tr>
<td>4</td>
<td>DIPLOMA (NOT HIGH SCHOOL)</td>
</tr>
<tr>
<td>7</td>
<td>OTHER(SPECIFY)</td>
</tr>
</tbody>
</table>

**K38.** In what field was that?

**K39.** From what type of institution or organization was that?

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>VOCATIONAL/TRADE SCHOOL</td>
</tr>
<tr>
<td>02</td>
<td>COMMUNITY/JUNIOR COLLEGE</td>
</tr>
<tr>
<td>03</td>
<td>BUSINESS/SECRETARIAL SCHOOL</td>
</tr>
<tr>
<td>04</td>
<td>ARMED FORCES</td>
</tr>
<tr>
<td>05</td>
<td>HIGH SCHOOL</td>
</tr>
<tr>
<td>06</td>
<td>HOSPITAL/HEALTH CARE FACILITY OR SCHOOL</td>
</tr>
<tr>
<td>07</td>
<td>COSMETOLOGY/BEAUTY/BARBER SCHOOL</td>
</tr>
<tr>
<td>08</td>
<td>POLICE/FIREFIGHTER TRAINING PROGRAM</td>
</tr>
<tr>
<td>09</td>
<td>JOB TRAINING THROUGH GOV'T, EXCEPT 08</td>
</tr>
<tr>
<td>10</td>
<td>TRAINING BY PRIVATE EMPLOYER</td>
</tr>
<tr>
<td>11</td>
<td>RELIGIOUS INSTITUTION, BIBLE COLLEGE/SCHOOL</td>
</tr>
<tr>
<td>97</td>
<td>OTHER(SPECIFY)</td>
</tr>
</tbody>
</table>

**K41.** Did she receive any other training degree or certificate?

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>YES</td>
</tr>
<tr>
<td>5</td>
<td>NO</td>
</tr>
</tbody>
</table>
We’ve left room here for you to record up to eight certificates for Wife/"Wife," going through the question sequence for each one. We want such training here as trade school, secretarial school, cosmetology school, ministry training, professional apprenticeships, etc., that result in skills and certification for jobs. We do not want mini-courses in cooking, skiing, or other one-time, self-improvement courses. Also, we do not want other college degrees "lower" than the one reported at K32-35. But, if R insists upon giving it, verify (i.e., probe) that the degree at K32-35 is the highest and record the other here.
**K42.** Is your wife's religious preference Protestant, Catholic, or Jewish, or what? SELECT PROTESTANT IF R ANSWERS ANY PROTESTANT DENOMINATION.

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>CATHOLIC</td>
</tr>
<tr>
<td>02</td>
<td>JEWISH</td>
</tr>
<tr>
<td>08</td>
<td>PROTESTANT/ANY PROTESTANT DENOMINATION</td>
</tr>
<tr>
<td>10</td>
<td>NON-CHRISTIAN/MUSLIM/BUDDHIST</td>
</tr>
<tr>
<td>13</td>
<td>GREEK/ RUSSIAN/EASTERN ORTHODOX</td>
</tr>
<tr>
<td>97</td>
<td>OTHER(SPECIFY)</td>
</tr>
<tr>
<td>00</td>
<td>NONE/ATHEIST/AGNOSTIC</td>
</tr>
</tbody>
</table>

**K43.** What denomination is that?

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>03</td>
<td>BAPTIST</td>
</tr>
<tr>
<td>04</td>
<td>LUTHERAN</td>
</tr>
<tr>
<td>05</td>
<td>METHODIST/AFRICAN METHODIST</td>
</tr>
<tr>
<td>06</td>
<td>PRESBYTERIAN</td>
</tr>
<tr>
<td>07</td>
<td>EPISCOPALIAN</td>
</tr>
<tr>
<td>12</td>
<td>JEHOVAH'S WITNESSES</td>
</tr>
<tr>
<td>14</td>
<td>&quot;CHRISTIAN&quot;</td>
</tr>
<tr>
<td>18</td>
<td>PENTECOSTAL/ASSEMBLY OF GOD</td>
</tr>
<tr>
<td>08</td>
<td>PROTESTANT UNSPECIFIED</td>
</tr>
<tr>
<td>97</td>
<td>OTHER(SPECIFY)</td>
</tr>
</tbody>
</table>

**K44.** How many years altogether has your wife worked for money since she was 18?

[CODE ACTUAL NUMBER OF YEARS (01-98)]

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>00</td>
<td>NONE</td>
</tr>
<tr>
<td>01</td>
<td>ONE YEAR OR LESS</td>
</tr>
<tr>
<td>98</td>
<td>NINETY-EIGHT YEARS OR MORE</td>
</tr>
<tr>
<td>99</td>
<td>DK, RF</td>
</tr>
</tbody>
</table>

**K45.** How many of these years did she work full-time for most or all of the year?

YEARS WORKED FOR MONEY: 20

[CODE ACTUAL NUMBER OF YEARS WORKED FULL-TIME (01-98), IF RESPONDENT MENTIONS 'ALL', ENTER NUMBER DISPLAYED]

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>00</td>
<td>NONE</td>
</tr>
<tr>
<td>01</td>
<td>ONE YEAR OR LESS</td>
</tr>
<tr>
<td>98</td>
<td>NINETY-EIGHT YEARS OR MORE</td>
</tr>
<tr>
<td>99</td>
<td>DK, RF</td>
</tr>
</tbody>
</table>
This is Wife's/"Wife's" religious preference--NONE is an acceptable answer, and if the Respondent prefers not to answer, don't probe.

If you select the PROTESTANT code, K43 is a follow-up question asking for the specific denomination. If the R gives the specific Protestant denomination at K42, please go ahead and select the PROTESTANT code (do not select OTHER).

This means the number of years in which any work was done, not total work time. For instance, if New Wife/"Wife" worked two months in 1982 and six months in 1992, that amounts to two years worked for the purposes of this question. Count time in the armed services as work years.

Thirty-five hours or more per week is full-time.
BACKGROUND AND EDUCATION OF NEW HEAD

L2/3. Now I have some questions about your family and past experiences. Where did your father grow up?
[MOST OF THE YEARS FROM AGES 6 TO 16--ACCEPT FATHER SUBSTITUTE]

NAME OF STATE; COUNTRY, IF FOREIGN:
COUNTY:
OR TOWN:

Where did your mother grow up? [ACCEPT MOTHER SUBSTITUTE]

NAME OF STATE; COUNTRY, IF FOREIGN:
COUNTY:
OR TOWN:

L4. What was your father’s usual occupation when you were growing up?
[ACCEPT FATHER SUBSTITUTE]

L5. Thinking of your first full-time regular job, what did you do?

clerk in a drug store

IWER: IF HEAD HAS NEVER WORKED, DON’T ASK THIS QUESTION AND ENTER 0 CODE FOR THIS RESPONSE.

L6. Have you had a number of different kinds of jobs, or have you mostly worked in the same occupation you started in, or what?

1 NUMBER OF DIFFERENT KINDS OF JOBS
3 BOTH/NUMBER OF DIFFERENT JOBS BUT SAME OCCUPATION
5 MOSTLY THE SAME OCCUPATION
7 OTHER(SPECIFY)
Part 10: Section L—Background and Education of New Head

L2/3 If New Head had numerous guardians other than parents while growing up, ask about those with whom New Head lived longest. Note that we want the state and county where New Head's mother and father (or guardian) grew up. ACCEPT MOTHER/FATHER SUBSTITUTE means if Head was raised by anyone in place of a parent, ask these questions about the man and/or woman who raised Head, and explain the situation in an [F2] comment.

L4-5 Probe to get as clear a picture as possible of the occupation (see objectives for B9-11 regarding collection of occupation information).

L6 We are interested in the similarity of occupations the New Head has had. That is, has New Head mostly worked in the same profession (construction, teacher, clerical, sales, etc.) or held a number of diverse professions? These occupations should include things at which the New Head worked full time, not part-time jobs held during high school, etc. This question applies regardless of whether or not New Head was in the labor force continuously.
L7. Did you grow up on a farm, in a small town, in a large city, or what? (MOST OF THE YEARS FROM AGES 6 TO 16)

1 FARM/COUNTRY
2 SMALL TOWN/SUBURB
3 LARGE CITY
4 OTHER(SPECIFY)

L8/9. In what state and county was that?  
[EXAMPLE: ILLINOIS, COOK COUNTY]

STATE:  
COUNTY:  

[IF DON'T KNOW COUNTY, ASK:]  
What was the name of the nearest town?

L11. Have you ever moved out of a community where you were living in order to take a job somewhere else?

1 YES  
5 NO

L13. Were your parents poor when you were growing up, pretty well off, or what?

1 POOR  
3 AVERAGE, "IT VARIED"  
5 PRETTY WELL OFF  
8 DK, DIDN'T LIVE WITH PARENTS
"Grow up" refers roughly to the ages of 6 to 16. If R mentions several places, say we want the place where the most years between ages 6 and 16 were spent.

We want the name of the county, but if R doesn't know it, ask for the nearest town; be sure to find out the name of the state in any case. If New Head grew up outside the U.S., ask for the name of the country.

There are two key phrases here. "Moved out of a community where you were living" means moving far enough to be out of easy contact. This may be a move to the other side of a city or across the country.

"In order to take a job somewhere else" means just that. We are not interested in moves made if New Head did not change jobs at the same time. Moving to take a different position with the same company does count.

We want R's subjective estimate. If the New Head was not living with parents, then the question applies to the family in which she/he grew up.
L14. How much education did your father have?
[Accept Father Substitute]

1 0-5 Grades
2 6-8 Grades/"Grade School"
3 9-11 Grades/Junior High
4 12 Grades/"High School"
5 12 Grades Plus Non-Academic Training
6 Some College/Associate's Degree
7 College/Bachelor's Degree
8 College, Graduate Work/Ph.D/Professional Degree
9 DK/RF

L18. Now I have some questions about brothers and sisters. Did you have any brothers?
[Include Natural Siblings Only]

1 Yes
5 No

L30. Were you living with both your natural parents most of the time until you were age 16?

1 Yes
5 No

L55. Is your religious preference Protestant, Catholic, or Jewish, or what?
Select Protestant if R Answers Any Protestant Denomination.

01 Catholic
02 Jewish
08 Protestant/Any Protestant Denomination
10 Non-Christian/Muslim/Buddhist
13 Greek-Russian/Eastern Orthodox
97 Other(Specify)
00 None/Atheist/Agnostic

L56. What denomination is that?

03 Baptist
04 Lutheran
05 Methodist/African Methodist
06 Presbyterian
07 Episcopalian
12 Jehovah's Witnesses
14 "Christian"
18 Pentecostal/Assembly of God
08 Protestant Unspecified
97 Other(Specify)
From this point to the end of the New Head section, the questions duplicate Section K for New Wife/"Wife." See Section K for instructions on specific questions, but remember that here we're gathering the information about the New Head.
Thank you for talking with me. You will receive a check for $15.00 from the University of Michigan for your participation in this interview. You will also receive an address postcard next winter worth $5.00 when you complete and return it to us. In order for the University to send your check and postcard, I must make sure that I have your name spelled correctly, as well as your correct address.

**R IS FU MEMBER**

**ENTER/VERIFY** Your name is? complete address? area code and phone number?

<table>
<thead>
<tr>
<th>TITLE</th>
<th>FIRST NAME</th>
<th>MIDDLE NAME</th>
<th>LAST NAME</th>
<th>SUFFIX</th>
</tr>
</thead>
<tbody>
<tr>
<td>1993R:</td>
<td>DANIEL</td>
<td>P</td>
<td>RHOSTLE</td>
<td>JR</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>NUMBER AND STREET</th>
<th>123 PLEASANT VALLEY</th>
</tr>
</thead>
<tbody>
<tr>
<td>CITY</td>
<td>ANYTOWN</td>
</tr>
<tr>
<td>ZIP CODE</td>
<td>28215 --</td>
</tr>
<tr>
<td>AREA CODE</td>
<td>222 PHONE NUMBER</td>
</tr>
<tr>
<td></td>
<td>555-6666 EXT.</td>
</tr>
</tbody>
</table>

In whose name is this phone listed? (unlisted?)

LISTED UNDER/UNLISTED

COMMENT

An interviewer for the Study of Family Economics may telephone you again about this time next year. You will be paid for that interview too. Just in case you should move before then and forget to return your address postcard, we would like the name of someone, such as a close friend or relative not living with you, who will know where we can reach you.

**CONTACT PERSON**

Who would you like to have listed as a contact person for you?

His/her relationship to you? And his/her complete address?

Area code and phone number?

<table>
<thead>
<tr>
<th>TITLE</th>
<th>FIRST NAME</th>
<th>MIDDLE NAME</th>
<th>LAST NAME</th>
<th>SUFFIX</th>
</tr>
</thead>
</table>

RELATIONSHIP TO R

<table>
<thead>
<tr>
<th>NUMBER AND STREET</th>
<th>(APT/SUITE NO.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>CITY</td>
<td>--</td>
</tr>
<tr>
<td>ZIP CODE</td>
<td>--</td>
</tr>
<tr>
<td>AREA CODE</td>
<td>PHONE NUMBER</td>
</tr>
<tr>
<td></td>
<td>EXT.</td>
</tr>
</tbody>
</table>

COMMENT
Part 11: Address, Payment, Recontact, and Thumbnail Information

This is your chance to tell our Respondents how much we appreciate their continued cooperation in our research, and to remind them of our payment procedures. Respondents are paid $15.00, usually by a check mailed from the University. If a Respondent tells you that she/he was never paid for the last interview, assure R that we will pay for both this and last year’s interview by check, through the mail. Be sure to note this on the screen that asks if there are any special payment instructions, and in the comment field of R’s address update screen (see below). Respondents are also paid $5.00 for returning an address update postcard to us around the first of the year. If an R says she/he did not receive this payment, again, please let us know.

If the R is an FU-Member, this address update screen will be displayed. If the interview was conducted with a proxy R, a slightly different screen will appear, asking the Proxy how the payment for the interview should be handled. In the case of Proxy interviews, an additional screen asks for the current address of the Head of the FU, so we can track the family again next year.

For Reinterview cases, the previous year’s Respondent information is already loaded. If the same R conducted this year’s interview, you need to simply read through the information to verify—and, of course, make any necessary changes. If this year’s Respondent is different, enter her/his information directly over the loaded information. For Splitoff and Recontact cases, you will need to enter all of the information. Please note that the first line contains a field for Title. This field will always be blank, so you need to ask the R how they prefer to be addressed (Ms., Dr., etc.), and record that here.

Just like the address update screens in the Coverscreen, these contain a two-line comment field. Please use this area to record any additional information that doesn’t “fit” or notes relating to any of the items on the screen. If the comment field isn’t large enough, continue your note by using [F2]. Examples are additional lines of overseas addresses, R requests payment by money order or payment be sent to another address.

Each year we ask the Respondents to give us the name and address of someone not living with them to be used as a Contact Person should we need to track the FU next year. None of this contact information is pre-loaded, so, even if R gives you the same person that is listed on the back of last year’s coversheet, you need to enter it into CATI at this point in the interview. Also, please do not just verify last year’s information—ask each question as it appears on the screen.

Again, please note the two-line comment field. Use this space to enter any additional information.
**IWER CHECKPOINT**

**ARE THERE OTHER PANEL FAMILIES IN THE FAMILY FOLDER THAT NEED AN UPDATE ON ADDRESS OR PHONE NUMBER?**

1 YES, NEED TO UPDATE OTHER FU'S ADDRESS/PHONE NUMBER
5 NO OTHER FUs IN FOLDER/NO UPDATE NEEDED

**Are there any payment problems or special instructions for paying this R that study staff or the control office should review?**

1 YES
5 NO

**Did you offer a Finder's Fee to get this interview?**

1 YES
5 NO

**FINDER/ SECOND CONTACT**

**TRANSCRIBE INFORMATION FROM FINDER'S FEE FORM TO FIELDS BELOW**

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<thead>
<tr>
<th>TITLE</th>
<th>FIRST NAME</th>
<th>MIDDLE NAME</th>
<th>LAST NAME</th>
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<td>RELATIONSHIP TO R</td>
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<td>NUMBER AND STREET (APT/SUITE NO.)</td>
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<td>AREA CODE</td>
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<td>FINDER'S FEE OFFERED $</td>
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<td>COMMENT</td>
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Family Folder Update

This screen is a checkpoint for you. If there are remaining coversheets in the Family Folder that need address/phone updates, ask the Respondent for help with this information and record these updates at Item 4 on the paper coversheets (to be updated in CATI later). This step is especially important when there are Recontact cases in the Folder, since we are starting with no address/phone information at all on these FUs.

Payment Problems

At this screen, indicate whether the case needs to be reviewed because of any problems or unusual circumstances involving payment. If you select NO at this screen, the case will go through an automatic payment procedure. If you select YES, a follow-up screen asks you to describe the situation. Please include as much detail as possible.

Finder's Fee

We offer a $5.00 Finder's Fee to anyone who gives us address/phone information that leads to a completed interview. If a Finder's Fee was offered, the information should be recorded at Item 44 on the back page of the paper coversheet. Always check the coversheet—an interviewer before you may have offered a Finder's Fee of which you aren't aware.

If a Finder's Fee was offered, transcribe the information from the coversheet into CATI. Always record the amount of money offered, since we allow interviewers to offer up to $10.00 if needed.
IWER: INDICATE LANGUAGE(S) USED TO CONDUCT THIS IW. ENTER ALL THAT APPLY.

1. ENGLISH
2. SPANISH
3. OTHER THAN ENGLISH OR SPANISH (SPECIFY)

IWER: SHOULD STUDY STAFF REVIEW THIS CASE DURING EDITING?

IF "YES", PLEASE DETAIL SPECIAL CIRCUMSTANCES IN THE THUMBNAIL AND COVERSSCREEN SUMMARY ITEMS THAT FOLLOW.

1. YES
5. NO
Language Used

Indicate here which languages you used to conduct the interview. In most cases, it will be either English or Spanish, but in some cases you will use both (indicate this by selecting 1 and 2). The Other category should be selected only for languages other than English or Spanish. You must get Project Manager approval prior to conducting an interview in a language other than English or Spanish. A specify box will appear automatically at this screen for you to specify the language.

Edit Flag

Review your notes from the paper coversheet or elsewhere. If anything unusual or problematic happened during the interview that would be helpful for the editors to know while they are reviewing the data, select YES at this screen.

Give the details of where and what we should look at in the Thumbnail items. Reasons for selecting YES here include an incorrect FU/HU composition (not including individuals in the FU who should have been, including individuals in the FU who shouldn’t have been, incorrect relationship to Head codes), incorrect employment and/or income information for anyone in the FU, answers to a particular question recorded at a different question, etc. If you are in doubt about whether or not to select YES, please select it! We would rather carefully look at more cases than necessary than have incorrect data. If you select NO, the case will go through an automatic editing process.
The coverscreen indicates that only family unit (FU) members are living in this household unit. Please verify and/or explain the situation.

1 YES, ONLY FU MEMBER
5 NO, OTHERS IN HU (SPECIFY)

Please provide a few words about this FU which might help study staff understand any potentially confusing family situations or relationships (such as the fact that parents of grandchildren do not live in HU, who the actual parents of the stepchildren and grandchildren are, etc.)

Elaborate on any ambiguous or conflicting information in this interview that you want study staff to know about.

How would you describe the interview situation? Please add any other clarifying remarks that will be helpful to study staff when this interview is processed. If the FU should be recontacted for missing information from Ann Arbor, is there something else we should be aware of?
The Thumbnail consists of four screens; this is where you record any pertinent information about the interview situation or family relationships. If you indicated at the previous screen that an editor should review the case, these screens are where you explain why.

Please include as much detail as possible at each question. These screens are used to correctly interpret the data in the questionnaire, and to help with identifying problem cases that need to be flagged for next year.

As noted at the top of each screen, do not include any identifying information here. If you need to refer to an individual person, use their relationship to Head and their age and/or person number.

As with all open-ended questions, you need to enter something at each screen. If there are no special or notable circumstances, type None and go on.
[IWER: YOU MAY ENTER NAMES, ADDRESSES, AND PHONE NUMBER IN THE FOLLOWING COVERSHEET SUMMARY ITEMS.]

Others who can help locate this R: Include friends, neighbors, employer/business name and phone number.

[SPECIAL CIRCUMSTANCES: Indicate unusual family situations; best time/place for interview; future plans such as plan to move, retire, etc.; language or hearing problem; R would prefer personal IW and directions to residence.]

Did this IW have a Problem/Sensitive IW code assigned from a previous year indicated on the coversheet?

1 YES
5 NO

Should this IW have a Problem/Sensitive IW code assigned for next year? Study staff review needed?

1 YES
5 NO
Coversheet Summary

These two screens replace paper Coversheet Summary items that interviewers have been completing every year. At these screens, you may enter identifying information (including names and addresses). Special data processing procedures protect the confidentiality of these data items. It is important to include anything that helps to explain the interview situation, since this is the information that next year’s interviewers will have to review.

Problem/Sensitivity Codes

At the first screen, you simply refer to the Respondent label of the paper coversheet and note whether a problem/sensitivity code was assigned to the case in a previous year.

Whether or not a code is indicated on the label, the second question asks whether a code should be assigned for next year. Indicate, based on your experience in conducting the interview this year, whether you think a Problem/Sensitivity code is needed for next year. Then describe in the box provided what the problem or situation is. Whenever you select YES here, someone will review the case carefully and assign the correct code. Please see the list of problem/sensitivity codes in Appendix 4 of your Study Guide and posted in each Telephone Facility carrel to familiarize yourself with what we are looking for here. If a code was indicated this year, but it no longer applies, you should select NO on the second screen.