

## T-2 Income and Transfers in Main Interview: 1999-2023

Domain	Question Text	Family member and waves available: RP=Reference Person*, SP=Spouse/Partner*, FUM=Family members
<b>T-2 Total Family Income</b>	R23. What was the total income from all sources (for you and your family living there)? R24. Was it about the same as in [PPY-1], much lower, slightly lower, slightly higher, or much higher? R24a-c. Would income amount to \$25,000 or more/\$40,000 or more/\$65,000 or more?	1999 1999-2001 2003
<b>T-2 Individual Earnings</b>	R26/R33/R41/R2. About how much did (you/he) earn altogether from working at [that/those job(s)]?  R2. Accuracy of earnings R27/R34/R42/ (2005-R12). About how many weeks did (you/he) work [on any jobs]?  BCDE14D. For the year before last, [P2YEAR], from the information you have given me on [both of / all of] [your / your / [RP / SP]'s] [job / jobs], [you were / [he / she] was] employed approximately [#WEEKS] out of 52 weeks in [P2YEAR]. Does this sound correct? BCDE14E. Thinking about [your / your / [RP / SP]'s] work in [P2YEAR], how many weeks did [you / he / she] actually work on [all of] [your / his / her] [job / jobs] in [PYEAR], not counting time off for vacations, sick time, unemployment, etc.? R28/R35/R43/(2005-R13). During which months of [PPY] did you earn that income?  Total months receiving earnings  BCDE14EE. On average, how many hours a week did [you / he / she] work on 2+ JOBS: all of] [your / his / her] [1 JOB: job / 2+ JOBS: jobs] during [P2YEAR]? Accuracy of hours/week worked R30/R37/R45/(2005-R15). Were there any months in which you were unemployed and looking for work at least one week? Weeks Unemployed Weeks Out of the Labor Force	H, W, FUM 18+: 1999-2007; H/RP, W/SP: 2009-2023 H/RP, RP, SP: 2005-2023 H, W: 1999-2001; FUM 18+: 1999-2007; H/RP, W/SP: 2009-2023  H/RP, W/SP: 2009-2023  H, W: 1999-2001, 2005-2007; FUM 18+: 1999-2007 ; H, W: 1999-2001; FUM 18+: 1999-2003  H, W: 1999-2001; FUM 18+: 1999-2007; H/RP, W/SP: 2009-2023 H/ RP, W/SP: 2009-2023 H, W: 1999-2001; FUM 18+: 1999-2007 ; H/ RP, W/SP: 2009-2023 H/ RP, W/SP: 2009-2023
<b>T-2 Asset Income</b>	R4 (2005). Did you receive any income from rent, dividends, interest, trust funds or royalties? R4. Type of asset income R5 (2005). How much did you receive altogether from (all of) these assets?  R6 (2005). During which months did you receive any of this income?	H, W, FUM 18+: 2005-2007 H, W: 2005 H, W, FUM 18+: 2005; H, W, FUM 18+: 2007 H, W, FUM 18+: 2005; H, W FUM 18+: 2007
<b>T-2 Transfer Income</b>	R1/(2005 - R41). At any time, even for one month, did you (or anyone else living with you) receive any public assistance or welfare payments from the state or local welfare office?	1999-2015

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<b>T-2 Transfer Income</b>	R2/(2005-R42). Who received that public assistance or state or local welfare?	1999 -2007
	R3/(2005-R43). In which state were you living at the time you received that public assistance?	1999 -2007
	R4/(2005-R44). Which type of public assistance did you receive?	1999 -2007
	R5/(2005-R45). How much did you receive altogether from all of the public assistance or welfare program(s) you just mentioned?	1999-2001; 2003-2007
	R6/(2005-R46). During which months did you receive any type of public assistance or welfare?	1999-2001; 2003-2007
	Total months receiving public assistance	1999-2001
	Annualized public assistance amount	1999-2001
	Accuracy of annualized public assistance amount	1999-2001
	R7/(2005-R47). At any time did you (or anyone else living with you) receive Supplemental Security Income?	1999-2015
	R8/(2005-R48). Who (in the family) received Supplemental Security Income?	1999-2007
	R9/(2005-R49). How much did you (and your family) receive altogether from Supplemental Security Income?	1999-2007
	R10/(2005-R50). During which months did you receive it?	1999-2007
	R11/(2005-R55). At any time did you (or anyone else living with you) receive income from child support?	1999-2015
	R12/(2005-R56). Who (in the family) received child support?	1999-2007
	R13/(2005-R57). How much did you (and your family) receive altogether from child support?	1999-2007
	R14/(2005-R58). During which months did you receive it?	1999-2007
	R15/(2005-R59). At any time during 1997 did you (or anyone else living with you) receive help from relatives?	1999-2007
	R16/(2005-R60). Who (in the family) received that help?	1999-2007
	R17/(2005-R61). How much help did you (and your family) receive altogether?	1999-2007
	R18/(2005-R62). During which months did you (and your family) receive it?	1999-2007
	R19. At any time, did anyone (else) not living there help you (and your family) out by giving you money?	1999-2003
	R20. Who (in the family) received that help?	1999-2003
	R21. How much help did you (and your family) receive altogether?	1999-2003
	R22. During which months did you receive it?	1999-2003
	R20 (2005). Did you (or anyone else in the family there) receive any income from Social Security?	2005-2015
R21 (2005). Who received that Social Security?	2005-2007	
R22 (2005). Which type(s) of Social Security did you receive?	2005-2007	
R23 (2005). How much did you receive altogether from all Social Security?	2005-2007	
R24 (2005). During which months did you receive any type of Social Security?	2005-2007	
R25 (2005). At any time did you (or anyone else living with you) receive any pension income from a	2005-2015	

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	former employer (not including a veteran's pension)?	
	R26 (2005). Who received that pension income?	2005-2007
	R27 (2005). How much did you receive altogether from all pensions?	2005-2007
	R28 (2005). During which months did you receive this pension income?	2005-2007
	R29 (2005). At any time did you (or anyone else living with you) receive any income from the Veterans Administration - such as pension or disability payments?	2005-2015
<b>T-2 Transfer Income</b>	R30 (2005). Who received that veteran's income?	2005-2007
	R31 (2005). How much did you receive altogether from the Veterans Administration?	2005-2007
	R32 (2005). During which months did you receive this income?	2005-2007
	R33 (2005). At any time did you (or anyone else living with you) receive income from Unemployment Compensation?	2005-2015
	R34 (2005). Who received that Unemployment Compensation?	2005-2007
	R35 (2005). How much did you receive altogether from Unemployment Compensation?	2005-2007
	R36 (2005). During which months did you receive Unemployment Compensation?	2005-2007
	R37 (2005). At any time did you (or anyone else living with you) receive income from Workers Compensation?	2005-2015
	R38 (2005). Who received that Workers Compensation in?	2005-2007
	R39 (2005). How much did you receive altogether from Workers Compensation?	2005-2007
	R40 (2005). During which months did you receive this income?	2005-2007
	R51 (2005). At any time did you (or anyone else living with you) receive income from any other welfare or assistance program?	2005-2015
	R52 (2005). Who received that?	2005-2007
	R53 (2005). How much did you receive altogether from other welfare?	2005-2007
	R54 (2005). During which months did you receive it?	2005-2007
	R63 (2007). Did you (or anyone else in your family there) receive any other income from anything else?	2007
	R64 (2007). Who was that?	2007
	R65 (2007). What was that other income from?	2007
	R66 (2007). How much did you get altogether from other income?	2007
	R67 (2007). During which months did you get this other income?	2007
<b>T-2 Use of Assistance Programs</b>	R48. Since January, was there any time when you, or anyone receiving benefits, stopped receiving welfare or public assistance checks for more than one month?	1999-2003
	R48a. Who was that?	1999-2003
	R49. The last time that happened, did the welfare office cut you off, or was it your decision to leave welfare?	1999-2003

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<b>T-2 Use of Assistance Programs</b>	R50. Why did you leave welfare?	1999-2003
	R51. Why did the welfare office cut you off?	1999-2003
	R52. Have you ever reapplied for public assistance since then?	1999-2003
	R53. Why didn't you reapply?	1999-2003
	R54. Is anyone in the family receiving public assistance right now?	1999-2003
	R55. Is anyone in the family required to work, go to school, or do anything else to receive these benefits?	1999-2003
	R56. What are you/they required to do?	1999-2003
	R58. Since January, was there any time when you, or anyone receiving food stamps, stopped for more than one month?	1999-2003
	R58a. Who was that?	1999-2003
	R59. The last time that happened, did the food stamp office cut you off or was it your decision to leave the food stamp program?	1999-2003
	R60. Why did you leave the food stamp program?	1999-2003
	R61. Why did the food stamp office cut you off?	1999-2003
	R62. Have you/they ever reapplied for food stamps since then?	1999-2003
	R63. Why didn't you reapply?	1999-2003
	R64. Are you (or anyone else in the family) receiving food stamp benefits right now?	1999-2003
	R65. Are you (or anyone else in the family) required to work, go to school or do anything else in order to receive food stamps?	1999-2003
	R66. What are you required to do?	1999-2003
	R68. Since January, did you (or anyone else in your family living there) complete an application to receive any government assistance because you had income that was too low?	1999-2003
	R69. For which government programs did you complete an applications?	1999-2003
	R69a. Why didn't you apply?	2003
	R70. Has the application for [PROGRAM NAME] been approved, denied or are you waiting to hear?	1999-2003
	R71. If you application was approved, why didn't you receive those benefits?	1999-2003
	R72. What reasons were given for you being denied the assistance?	1999-2003
	R74. Did you (or anyone in your household) receive any of the following types of government assistance because your income was too low:	1999-2003
a. Transportation	1999-2003	
b. Housing	1999-2003	
c. Child Care	1999-2003	
d. Health Care (not including Medicaid)	1999-2003	
e. Finding a job or getting job training	1999-2003	
f. Food or meals (not including Food Stamps)	1999-2003	

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Domain	Question Text	Family member and waves available: RP=Reference Person*, SP=Spouse/Partner*, FUM=Family members
	g. Clothing	1999-2003
	h. Paying other expenses	1999-2003
<b>T-2 Use of Assistance Programs</b>	R75. What about help from anyone else, such as a church, family, or a community group. Did you (or anyone in your household) receive help with any of the following in [PPY] and [PY] from such groups because your income was too low:	1999-2003
	a. Transportation	1999-2003
	b. Housing	1999-2003
	c. Child Care	1999-2003
	d. Health Care (not including Medicaid)	1999-2003
	e. Finding a job or getting job training	1999-2003
	f. Food or meals (not including Food Stamps)	1999-2003
	g. Clothing	1999-2003
	h. Paying other expenses	1999-2003
	R76. Was that help from a church, family, community group, or what?	1999-2003
	R78. During [PY], did you (or anyone in your family) receive free or reduced-cost meals for the elderly?	1999-2003
	R80. During [PY], did any child in the family between 5 and 18 years old receive free or reduced-cost lunch at school?	1999-2003
	R81. During [PY], did any child in the family receive free or reduced-cost breakfasts at school?	1999-2003
	R82. During [PY], did anyone in your family get food through the WIC program?	1999-2003

\*Prior to 2017, Reference Person was referred to as Head and prior to 2015 Spouse or Partner was referred to as Wife or "Wife"

## Summary of T-2 Weeks, Hours and Labor Income in the PSID Data

### Overview

When the PSID transitioned to biennial interviewing in 1999, Section R was added to capture information on labor, transfer and asset income in the “off” year (the T-2 year, two years before the year of the interview). Beginning in 2003, we also began collecting employment data for the T-2 year for response persons\* and spouses\* or partners\* in the Employment Event History Calendar (EHC).

T-2 variables are spread over the family and individual files. If only response persons and spouses or partners are asked a particular question, then these variables generally are stored on the Family File. However, if OFUMs (other family unit members) are also asked then by necessity these variables must be stored on the Cross Year Individual File. Sometimes we have replicated the same information in both places. For example, if we have an individual earnings question that includes OFUMs then there will be an individual level variable that has data for response persons and spouses or partners and OFUMs; additionally we may repeat response person’s earnings on the family file under response person’s income and then a second family level variable for spouse or partner earnings (*see R26/R33 (ER33727B/ ER23702F2/ ER23702L5) in 2003 as an example*).

Section R, which focuses on T-2 income, weeks, and transfers continued to evolve from 1999 forward. In some waves we ask certain questions about all individuals at the same question (response persons and spouses or partners and OFUMs) but once the EHC was added in 2003 then questions pertaining specifically to heads and wives were moved to that section. From 2003 forward, some questions in Section R that had been asked of response persons and spouses or partners and OFUMs were now only asked of OFUMs in section R and then response persons and spouses or partners in BC/DE (EHC) module. Users must use great caution when using T-2 variables as the number of observations can fluctuate significantly for the same question because of the shifting universe of individuals being asked a specific series.

Due to concerns about the quality of the T-2 data, much of it was not released as part of the regular Family and Individual releases each wave. In March 2014 and in January 2016, PSID Staff have released all the T-2 variables asked in Section R or derived from the EHC module. Users may find a complete list of these variables [listed here](#). We nevertheless still remind the user to exert caution in analyzing T-2 information that may be subject to significantly higher measurement error (e.g. through recall errors) than the corresponding core PSID variables.

### EHC Summary

In the Employment EHC, we ask response persons and spouses or partners about employment as of Jan 1st in the T-2 year. We collect the employer name and the start and stop dates for any employment spells in T-2 (see BC/DE4).

We also ask about unemployment (UNEMP) and out of the labor force (OOLF) time for T-2 (see BC/DE7/8). Respondents may answer these questions using start and stop dates as they do with employment spells, but, in addition, they may answer in days, weeks or months (if the R doesn't know when exactly but they know it was sometime in the T-2 year). For editing purposes we combine the times for the spells and periods of 'Don't Know When' in terms of days, weeks, and months unemployed and out of the labor force.

From the start and stop dates for each job record we can calculate the number of weeks employed. Please note that we cannot calculate the number of weeks worked because for T-2 we do not ask about time away from the job such as vacation, sick time and so forth as we do for T-1. We also determine whether the response persons and spouses or partners were employed, unemployed, or out of the labor force, by month.

The January 2016 release updates the family files from 2003-2011 to include the full set of T-2 EHC variables for all years that the EHC was used (2003-2013). The full set of the T-2 EHC variables was only previously included in the 2013 data; the 2011 and 2009 data had a portion of the T-2 EHC data, and no T-2 EHC data had previously been released for 2007, 2005 or 2003.

#### List of Variables Derived from the EHC module

For 2003-2013, we have generated the following list of variables for T-2 work, unemployment and out of labor force time.

- 1) Whether RP was employed in T-2
- 2) Number of jobs employed at in T-2
- 3) Number of weeks RP was employed in T-2 (BC/DE4)
- 4) Average hours a week RP worked (BC/DE14EE)
- 5) Accuracy code for hours a week worked
- 6) Labor income for T-2 amt (R2)
- 7) Labor income per
- 8) Accuracy code for labor income
- 9) WTR RP was employed in Jan T-2
- 10) WTR RP was employed in Feb T-2
- 11) WTR RP was employed in Mar T-2
- 12) WTR RP was employed in Apr T-2
- 13) WTR RP was employed in May T-2
- 14) WTR RP was employed in Jun T-2
- 15) WTR RP was employed in Jul T-2
- 16) WTR RP was employed in Aug T-2
- 17) WTR RP was employed in Sep T-2
- 18) WTR RP was employed in Oct T-2
- 19) WTR RP was employed in Nov T-2

- 20) WTR RP was employed in Dec T-2
- 21) Whether RP was unemployed in T-2
- 22) Number of weeks RP was unemployed (BC/DE7)
- 23) WTR RP was unemp in Jan T-2
- 24) WTR RP was unemp in Feb T-2
- 25) WTR RP was unemp in Mar T-2
- 26) WTR RP was unemp in Apr T-2
- 27) WTR RP was unemp in May T-2
- 28) WTR RP was unemp in Jun T-2
- 29) WTR RP was unemp in July T-2
- 30) WTR RP was unemp in Aug T-2
- 31) WTR RP was unemp in Sep T-2
- 32) WTR RP was unemp in Oct T-2
- 33) WTR RP was unemp in Nov T-2
- 34) WTR RP was unemp in Dec T-2
- 35) Whether RP was out of the labor force in T-2
- 36) Number of weeks RP was out of the labor force in T-2. (BCDE8)
- 37) WTR RP was oolf in Jan T-2
- 38) WTR RP was oolf in Feb T-2
- 39) WTR RP was oolf in Mar T-2
- 40) WTR RP was oolf in Apr T-2
- 41) WTR RP was oolf in May T-2
- 42) WTR RP was oolf in Jun T-2
- 43) WTR RP was oolf in Jul T-2
- 44) WTR RP was oolf in Aug T-2
- 45) WTR RP was oolf in Sep T-2
- 46) WTR RP was oolf in Oct T-2
- 47) WTR RP was oolf in Nov T-2
- 48) WTR RP was oolf in Dec T-2

A parallel list of variables is available for SP.

### Variable Generation and Cleaning

If response person and spouse or partner is marked as having at least one job record in T-2 then “whether employed” is coded as ‘yes’. The total number of weeks unemployed and OOLF was constructed by bringing months and days marked to the week level and generating the sum of weeks unemployed and weeks out of the labor force (OOLF), rounded to the nearest whole week. For T-2 we do not enforce the same types of consistency checks as we do in T-1. Therefore the most efficient way to account for all 52 weeks of the year for those who had at least one job was to subtract the number of weeks unemployed and the number of weeks OOLF from 52.



In Stage 1, we check that for those not reporting any job, they must have all 52 weeks covered by UNEMP or OOLF time. For cases with no job but fewer than 52 weeks reported, we made adjustments based on interviewer notes, the T-1 job and labor force data, and the T-2 data reported. For example, if only part of T-2 was marked unemployed and this person reported no job, then we marked the rest of the year as OOLF. If the person had no job, and had neither UNEMP nor OOLF marked, then we flagged this person as having both UNEMP and OOLF time, but marked the months of each to N/A.

Similarly, if response persons and spouses or partners reported 52 weeks of employment but also marked weeks of UNEMP or OOLF time then we corrected the UNEMP /OOLF time so that employed time and UNEMP/OOLF time do not overlap. During Stage 1 cleaning, we also flagged cases where at least one job was mentioned but average hours a week across jobs was zero. If we had enough information from T-1 then we used this to code average hours a week in T-2 with an accuracy code of 1. If we had no information, then we coded average hours a week as N/A.

Stage 2 cleaning involved picking up labor income amounts from Section R. We combined this amount with whether employed and checked that we had a non-zero value for labor income if whether employed was 'yes'. If we had no report for labor income, and we had information for T-1 then we used that information in addition to the weeks employed in T-2 to code labor income with an accuracy code of 1. If we had no information about earnings, then labor income was coded N/A. Conversely, we also checked that we had a zero value for T-2 labor income if the response person and spouse or partner was not employed. During this stage, we also checked and cleaned all cases with labor income amounts coded as \$1.

### Limitations

We were not able to generate weeks worked in T-2 due to the lack of information collected about sick time, vacation time and any other time away from work. The weeks reported in the T-2 EHC data are weeks employed, based on the job start and end dates. Without weeks worked, we are not able to generate an hourly rate for RP or SP in T-2. We do not perform extensive checking or cleaning of T-2 labor income.

Weeks employed, weeks OOLF, and weeks unemployed are rounded to the nearest week even though sometimes OOLF and unemployment time are reported in units of days or months. We do not have accuracy codes for weeks employed, weeks unemployed or weeks OOLF. If we were not given an actual report of weeks, we do not make any assignments of weeks. If no weeks were reported then weeks are marked N/A.

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