2007 THE PANEL STUDY OF INCOME DYNAMICS

1. INTERVIEWER'S LABEL

OR

TF INTERVIEWER ID: _____ _____ _____

2. Your Iw. No. ________________

3. Iw. Date ________________

4. Iw. Length _______ MINUTES

5. Post-edit Length _______ MINUTES

6. SAMPLE ID# _______ _______ _______

   IF SPLITOFF: PERSON NUMBER _______ _______

7. Who was your Respondent? 

   1. HEAD  2. WIFE  3. "WIFE"  7. OTHER (SPECIFY)

8. Total number of calls required to obtain interview (see item 19 of Coversheet):

9. Language of interview was ENTER all that apply:

   1. ENGLISH  2. SPANISH  7. OTHER (SPECIFY)
SECTION A: HOUSING

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. MOBBLE HOME; TRAILER  6. ROW HOUSE TOWN HOUSE
   7. OTHER (SPECIFY)

A5. INTERVIEWER CHECKPOINT: WHETHER HEAD/WIFE/"WIFE" IN FU IS AGE 55 OR OLDER
   1. HD OR WF/"WF" IS AGED 55 OR OLDER  5. ALL OTHERS → GO TO A8

A6. Do you live in a retirement community, senior citizens' housing complex, nursing home, assisted living, or adult foster care facility?
   1. YES  5. NO → GO TO A8

A7. Which kind is that?
   1. RETIREMENT COMMUNITY  2. SENIOR CITIZENS' HOUSING COMPLEX  3. NURSING HOME  5. ADULT FOSTER CARE FACILITY  6. ASSISTED LIVING

A8 (A16). How many rooms do you have [for your family] not counting bathrooms?
   (2-DIGIT VARIABLE)
   [WHEN HU/HUCS PRESENT: Remind R not to include rooms used by HU or HUCS people]
   CODE 1 – 19 = Actual number of rooms
   CODE 20 = Twenty or more rooms
   CODE 00 = FU shares a one-room HU with non-FU persons
A19. Do you [or anyone else in your family living there] own the [home/apartment], pay rent, or what?

(NOTE: DK/RF not allowed here)

<table>
<thead>
<tr>
<th>1. ANY FU MEMBER OWNS OR IS BUYING (FULLY OR JOINTLY)</th>
<th>5. FU PAYS RENT</th>
<th>8. FU NEITHER OWNS NOR RENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO A31</td>
<td></td>
<td>GO TO A34</td>
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</tbody>
</table>

A20. Could you tell me what the present value of [your/their] [house/apartment] is--I mean about how much would it bring if [you/they] sold it today?

$ 7 DIGITS

GO TO A21

A20a. Would it amount to $100,000 or more?

<table>
<thead>
<tr>
<th>1. YES</th>
<th>5. NO</th>
<th>8. DK</th>
<th>9. RF</th>
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<td>GO TO A21</td>
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A20b. $200,000 or more?

<table>
<thead>
<tr>
<th>1. YES</th>
<th>5. NO</th>
<th>DK/RF</th>
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<tbody>
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<td>GO TO A21</td>
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A20c. $400,000 or more?

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<th>1. YES</th>
<th>5. NO</th>
<th>DK/RF</th>
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<td>GO TO A21</td>
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A20d. $75,000 or more?

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<th>1. YES</th>
<th>5. NO</th>
<th>DK/RF</th>
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<td>GO TO A21</td>
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</table>

A20e. $25,000 or more?

<table>
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<tr>
<th>1. YES</th>
<th>5. NO</th>
<th>DK/RF</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td>GO TO A21</td>
</tr>
</tbody>
</table>

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

(5 DIGITS 0…99,999)

A22. How much is [your/their] total yearly homeowner's insurance premium?

(4 DIGITS 0…9,999)

A23. Do [you/they] have a mortgage or loan on this property?

<table>
<thead>
<tr>
<th>1. YES: MORTGAGE, LAND CONTRACT, HOME EQUITY LOAN, ETC.</th>
<th>5. NO</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>DK/RF</td>
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<tr>
<td></td>
<td>GO TO MORTGAGE BLOCK, A23a</td>
</tr>
</tbody>
</table>
MORTGAGE BLOCK (ID=AQCASE, MTGENUM):

A23a. Is that a mortgage, a land contract, a home equity loan, or what?

A23a. [FOR 2ND MTGE]: For the second mortgage, what type of loan is that?

1. MORTGAGE  2. LAND CONTRACT, LOAN FROM SELLER
GO TO A23b  GO TO A23b

3. HOME EQUITY  4. HOME IMPROVEMENT  5. LINE OF CREDIT LOAN  7. OTHER (SPECIFY)

GO TO A24

A23b. Is that the original loan and terms, or have you refinanced?

1. ORIGINAL  2. REFINANCED

A24. About how much is the remaining principal on this loan? (7 DIGITS 0...9,999,999)

A25. How much are [your/their] monthly loan payments? (5 DIGITS 0...99,999)

A25A-1. Is the interest rate on that mortgage or loan fixed or variable?

1. FIXED  2. VARIABLE

A25a. What is the current interest rate on that loan? [TWO 2-DIGIT VARS]

A25a WHOLE NUMBER PORTION [0...99]

A25b CODE BUILT FROM A25a AND FRACTIONAL PORTION AS FOLLOWS:

0= [A25a].0  5= [A25a] 5/8 OR [A25a].625
3= [A25a] 3/8 OR [A25a].375  8= OTHER (SPECIFY)
4= [A25a] 1/2 OR [A25a].5

A26. What year did [you/they] [obtain that loan/refinance]? (4 DIGITS 1901… 2007)

A27. About how many more years will you have to pay on it? (2 DIGITS 1…99)

A28. Do [you/they] also have a second mortgage?

1. YES  ASK A23a-A27 AGAIN, THEN GO TO A29  5. NO  GO TO A29

A29. Do your mortgage payments include property taxes?  1. YES  5. NO

A30. Do your payments include insurance premiums?  1. YES  5. NO

GO TO A38
IF FU PAYS RENT

A31. About how much rent do you pay a month?  
(THREE VARS: A31 5 DIGITS 1...99,999; A31PER= TPERWK; A31PERSPEC)  

If FU lives with non-FU members, PROBE: Is that only for your (FU's) share of the rent?

A31a (A32). Is this [house/apartment] rented fully furnished?  
1. YES  5. NO

A31b (A33). Is heating included in your monthly rent?  
1. YES  5. NO

A32 (A34). Is this [house/apartment] in a public housing project, that is, is it owned by a local housing authority or other public agency?  
1. YES  GO TO A38  5. NO

A33 (A35). Are you paying lower rent because a Federal, State, or local government housing program is paying part of the cost?  
1. YES  5. NO

GO TO A38

IF FU NEITHER OWENS NOR RENTS

A34 (A36). How is that? (Could you tell me a little more about your situation?)  (STRING 400)

A35 (A37). How much would it rent for if it were rented?  
(THREE VARS: A37 4 DIGITS 1...9,999; A37Per=TPERWK; A37PerSpec)  

If FU lives with non-FU members, PROBE: Is that only for your (FU's) share of the rent?

A36 (A38). Is this [house/apartment] in a public housing project, that is, is it owned by a local housing authority or other public agency?  
1. YES  GO TO A38  5. NO

A37 (A39). Are you paying no rent because a Federal, State, or local government housing program is paying all of it?  
1. YES  5. NO

GO TO A38
A38 (A40). Do you have air conditioning?

1. YES  5. NO  → GO TO A40

A39 (A41). Do you have it in all your rooms, or only in some of them?

1. ALL  2. SOME

A40 (A15). The next few questions are about [your/their] utilities, such as heating, electricity and water. How is [your/their] [home/apartment] heated--with gas, electricity, oil or what?

ENTER all that apply

01. GAS  02. ELECTRICITY  03. OIL  04. WOOD  05. COAL

06. SOLAR  10. BOTTLED GAS; PROPANE  11. KEROSENE  97. OTHER (SPECIFY)

A42-1. Now some questions about utility costs. Do you [and your family living there] pay for gas and electricity on one bill? If “YES”, ASK: Would you be able to separate those amounts?

1. YES, AND R IS ABLE TO SEPARATE AMOUNTS  2. YES, BUT R CANNOT SEPARATE AMOUNTS  5. NO, GAS & ELECTRIC ARE NOT COMBINED

GO TO A42A

A41 (A43). How much do you [and your family living there] usually pay for gas or other types of heating fuel per month on average?

(THREE VARS:  A41 4 DIGITS 0...9,999; A41Per USES TPERMO; A41PerSpec is STRING 100)

[WHEN HU/HUCS PRESENT: Remind R not to include amounts paid by HU or HUCS people]

A42. How much do you [and your family living there] usually pay) for electricity per month?

(THREE VARS:  A42 4 DIGITS 0...9,999; A42Per USES TPERMO; A42PerSpec is STRING 100)

[WHEN HU/HUCS PRESENT: Remind R not to include amounts paid by HU or HUCS people]

GO TO A43

A42a. How much do you [and your family living there] usually pay for gas and electricity combined?

(THREE VARS:  A42A 4 DIGITS 0...9,999; A42APer USES TPERMO; A42APerSpec is STRING 100)

[WHEN HU/HUCS PRESENT: Remind R not to include amounts paid by HU or HUCS people]

A43 (A44). How much do you [and your family living there] usually pay) for water and sewer per month?

(THREE VARS:  A43 4 DIGITS 0...9,999; A43Per USES TPERMO; A43PerSpec is STRING 100)

[WHEN HU/HUCS PRESENT: Remind R not to include amounts paid by HU or HUCS people]

A44. How much do you [and your family living there] usually pay) for telephone, including cell phone, cable or satellite TV, and internet service per month?

(THREE VARS:  A44 4 DIGITS 0...9,999; A44Per USES TPERMO; A44PerSpec is STRING 100)

[WHEN HU/HUCS PRESENT: Remind R not to include amounts paid by HU or HUCS people]

A45. And do you have any other utility expenses?

1. YES  5. NO  → GO TO A46

A45a (A46). What were those other utilities expenses? (STRING 100)

A45b (A47). On average, how much are these other utility expenses per month?

(THREE VARS:  A45 3 DIGITS 1...999; A45bPer USES TPERMO; A45bPerSpec is STRING 100)

[WHEN HU/HUCS PRESENT: Remind R not to include amounts paid by HU or HUCS people]
A46 (A17). There are government programs that give money to people to help them pay for heating and cooling their homes. Did you receive help from such a program last year (2006)?

1. YES  5. NO  GO TO A47

A46a (A18). About how much did that amount to altogether?
(4 DIGITS 1...9,999)

A47. INTERVIEWER CHECKPOINT - WHETHER RESPONDENT IS PROXY

1. RESPONDENT IS PROXY  GO TO A48-EHC1  5. ALL OTHERS

A47a. Now, I have a few questions about the availability and use of computers in your home during the last year. [Do you/Does HEAD/Does WIFE/"WIFE"] have a computer or laptop that [you/he/she] can use in your home? Including any computers [you/he/she] might bring home to do work related to [your/his/her] your job?

1. YES  5. NO  GO TO A48-EHC1

A47b. In the past year, [have you/has he/has she] connected to the Internet or World Wide Web through a computer or laptop at home?

1. YES  5. NO

A48. INTERVIEWER CHECKPOINT - WHETHER WIFE/"WIFE" IN THE FU

1. WF/"WF" IN THE FU  ASK A47a -A47b AGAIN, ABOUT WF/"WF" THEN GO TO A48-EHC1  5. ALL OTHERS  GO TO A48-EHC1
A48. Now, did any major events happen in 2005 or 2006 for which you can EASILY remember the month and year when they took place? Consider any events that happened to you or to others whom you know well, such as births, deaths, marriages, divorces, a vacation, an accident, a move, a job change, promotion or pay raise. Can you provide any events for 2005 and 2006?

If R can't remember month and year, ASK: How long ago did that happen?

A49. Now I'd like to ask you about the places that you have lived in from January, 2005 until the present. If you could, please give me the street address, city, and state of each of the places in which you have lived during this time. Let's start with the move-in date of your current place, and then feel free to deal with any other residence in which you have lived since January, 2005.

**PANE FOR PRIOR MOVES:**

A50. Why did [you/HEAD] move?

ENTER all that apply

- 1. TAKE A JOB; STOPPED SCHOOL
- 2. NEARER TO WORK
- 3. MORE SPACE; BETTER PLACE
- 4. SMALLER; LESS EXPENSIVE
- 5. OWN A HOME; GOT MARRIED
- 6. BETTER AREA; CLOSE TO FAMILY
- 7. EVICTED; DIVORCED; JOB TRANSFER
- 8. OTHER (SPECIFY)

**PANE FOR FUTURE MOVES:**

A51. Do you think you might move in the next couple of years?

- 1. YES, MIGHT OR MAYBE
- 2. NEARER TO WORK
- 3. MORE SPACE; BETTER PLACE
- 4. SMALLER; LESS EXPENSIVE
- 5. OWN A HOME; GOT MARRIED
- 6. BETTER AREA; CLOSE TO FAMILY
- 7. EVICTED; DIVORCED; JOB TRANSFER
- 8. OTHER (SPECIFY)

A52. Would you say you definitely will move, probably will move, or are you more uncertain?

- 1. DEFINITELY
- 2. PROBABLY
- 3. MORE UNCERTAIN

A53. Why [will/might] you move? [OPENEND]
**SECTION BC: EMPLOYMENT OF HEAD**

--- EMPLOYMENT TAB ---

**BC1.** We would like to know about what [you do/Head does]—[are you/ is HEAD] working now, looking for work, retired, keeping house, a student, or what?

01. WORKING NOW  
02. ONLY TEMPORARILY LAID OFF, SICK LEAVE OR MATERNITY LEAVE  
03. LOOKING FOR WORK, UNEMPLOYED  

GO TO BC4  

04. RETIRED  

BC2. In what year did [you HEAD] retire?

(4 DIGITS 1901-2007)

05. DISABLED, PERMANENTLY OR TEMPORARILY

06. KEEPING HOUSE  

GO TO BC3

07. STUDENT

08. OTHER (SPECIFY):

**BC3.** [Are you/Is he] doing any work for money now?

1. YES  
5. NO

**BC3A.** [Have you/Has HEAD] done any work for money since January 1, 2005? Please include any type of work, no matter how small.

1. YES  
5. NO  

GO TO NOT WORKING TAB - BC7

**BC4.** I'd like to know about all of the work for money that [HEAD has/ you have] done for the past two years, from January 1, 2005, to the present. Please include self-employment and any other kind of work that [HEAD has/ you have] done for pay. Start with any job that [HEAD /you] had during this time.

ASK BC5- BC6a FOR EACH EMPLOYER:

**BC5.** What was the name of this employer?

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

*IWER:* If no employer name is given by R, ask for job title or anything that can help identify the job.

**BC6.** When did [HEAD /you] start and when did [HEAD /you] stop working for this employer? Please give me all of [HEAD/your] start and stop dates if [HEAD has/you have] worked for [this employer/yourself] more than once.

**BC6a.** Is this a current job?

**BC6b.** [Has HEAD/Have you] started a new job this month?

*IF YES, please record info in the last cell of new job line.*
BC7. Now I’d like to know about times during 2005 and 2006 in which [HEAD was /you were] not working at all for pay. First, I’d like to know about any times when [HEAD was /you were] NOT LOOKING for work, and next I’d like to know about any times when [HEAD was/you were] LOOKING for work.

Was there any time in 2005 or 2006 when [HEAD/you] did not have a job and [was/were] not looking for work?

IF YES: When was that?

BC8. Was there any time last year, in 2006, when [HEAD was/you were] unemployed and looking for work?

THREE VARS: BC8DAYS=1-365, BC8WKS=1-52, BC8MOS=1-12

IF YES: When was that?
IF DK WHEN: How much time was that in 2005?

BC9. Was there any time in the year before last, in 2005, when [HEAD was/you were] unemployed and looking for work?

THREE VARS: BC9DAYS=1-365, BC9WKS=1-52, BC9MOS=1-12

IF YES: When was that?
IF DK WHEN: How much time was that in 2005?

BC10. We’re interested in time [HEAD/you] spent away from work last year, during 2006.

Did [HEAD/you] miss any work because someone else was sick?

THREE VARS: BC10DAYS=1-365, BC10WKS=1-52, BC10MOS=1-12

IF YES: When was that?
IF DK WHEN: How much work did [HEAD/you] miss in 2006?

BC11. Did [HEAD/you] miss any work because [HEAD was/you were] sick?

THREE VARS: BC11DAYS=1-365, BC11WKS=1-52, BC11MOS=1-12

IF YES: When was that?
IF DK WHEN: How much work did [HEAD/you] miss in 2006?

BC12. Did [HEAD/you] take vacation or time off?

THREE VARS: BC12DAYS=1-365, BC12WKS=1-52, BC12MOS=1-12

IF YES: When was that?
IF DK WHEN: How much time off did [HEAD/you] take in 2006?

BC13. Did [HEAD/you] miss any work because [HEAD was/you were] on strike?

THREE VARS: BC13DAYS=1-365, BC13WKS=1-52, BC13MOS=1-12

IF YES: When was that?
IF DK WHEN: How much work did [HEAD/you] miss in 2006?

BC14. Did [HEAD/you] miss any work because [HEAD was/you were] temporarily laid off from work?

THREE VARS: BC14DAYS=1-365, BC14WKS=1-52, BC14MOS=1-12

IF YES: When was that?
IF DK WHEN: How much work did [HEAD/you] miss in 2006?
QUESTIONS ARE FOR PERSON WITH CYFU=1.4 AND CYAQRTH=101, 102; INCLUDE AQSN ON ALL OUTPUT FILES FROM THIS SECTION. VARNAME=BCAQS.

EXPORTED DUMMIES FROM EHC:
BCWTRWRK=1 IF BC3=0, 1; IF 5,8,9 THEN = 0. MEANS WHETHER WORKED SINCE 01/01/2005.

THEN, FOR EACH JOB, WE GET:
BCJOBNUM (A SEQUENTIAL ID, UNCLEAR WHAT THE MAX WE SHOULD ALLOW IS. 10 SEEMS SUFFICIENT); BCEMPNAME (EMPLOYER NAME, NEEDED FOR FILL/IWER REFERENCE);
BCWTR2005 (WHETHER EMPLOYED DURING 2005 FOR THIS EMPLOYER--CODES=1 & 0);
BCWTR2006 (WHETHER EMPLOYED DURING 2006 FOR THIS EMPLOYER--CODES=1 & 0);
BCWTR2007 (WHETHER EMPLOYED DURING 2007 FOR THIS EMPLOYER--CODES=1 & 0);
BCCUR (WHETHER CURRENTLY WORKING FOR THIS EMPLOYER--CODES=1 & 0);
BCMOSTREC (WHETHER MOST RECENT EMPLOYER--CODES=1 & 0; NOTE THAT IF ANY JOB IS MARKED AT BCCUR, THEN THIS VARIABLE IS ALWAYS ZERO FOR ANY JOBS THAT HAVE ENDED);
BCACCDATE (WHETHER START [AND STOP DATE, IF APPLICABLE] ARE KNOWN TO MONTH LEVEL--CODES 1 & 0);

OVERALL INDICATORS FOR ASKING "GROUP" WEEKS AND HOURS QUESTIONS:
BCDKJOBS2006 (WORKED BUT NO JOBS SPECIFIED, OR JOB LISTED BUT NA YEAR OR MONTH START-STOP, OR TIME-OFF COMPONENTS NA--CODES 1 & 0)
BCDKJOBS2005 (WORKED BUT NO JOBS SPECIFIED, OR JOB LISTED BUT NA YEAR OR MONTH START-STOP--CODES 1 & 0)
BCDKHOURS (WORKED BUT NO JOBS SPECIFIED, OR JOB LISTED BUT HAS NA START-STOP YEAR--CODES 1 & 0).

BC15. INTERVIEWER CHECKPOINT

SEE EXPORTED EHC VARS BCWTRWRK, BCCUR AND BCMOSTREC -- WHETHER ANY EMPLOYERS AND CMJ/MRMJ INDICATORS

EMPLOYERS EXPORTED FROM EHC (BCWTRWRK=1)

5. ALL OTHERS)
GO TO BC61

1. ONLY 1 CMJ
   (1 JOB HAS BCCUR=1)
GO TO BC18

2. 2 OR MORE CMJ'S
   (2+ JOBS MARKED 1 AT BCCUR)

3. ONLY 1 MRMJ
   (1 JOB HAS BCMOSTREC=1)
GO TO BC18

4. 2 OR MORE MRMJ'S
   (2+ JOBS MARKED 1 AT BCMOSTREC)
GO TO BC18

BC16. You have just told me that [you/HEAD] [are/is] working now for more than one employer.
Which one of these jobs do you consider to be [your/his] main job?
GO TO BC18 AND MARK CMJ

BC17. You mentioned [NUMBER OF JOBS] jobs that ended at the same time-- [EMPLOYER NAMES.] Which one of these jobs do you consider to have been [your/his] main job?
GO TO BC18 AND MARK MRMJ
BC18. JOB #: ________ EMPLOYER NAME: __________ CMJ/MRMJ? ________
(3 VARS: BCJOBNUM, 2 DIGITS; BC18EMPNAME, 25 CHARACTERS; BC18CMJ=1 FOR CMJ, 2 FOR MRMJ, 3
FOR OTHER JOB)

BC19. INTERVIEWER CHECKPOINT

SEE START-STOP INDICATORS FROM EHC--BCWTR2006 AND BCWTR2007

1. WORKED DURING 2006 OR 2007 ON THIS JOB (BCWTR2006=1 OR BCWTR2007=1)

5. ALL OTHERS

GO TO BC47

BC20. Now I have a few questions about each of the jobs you have told me about. In [your/his] work for [EMPLOYER NAME], what [is/was] [your /HEAD'S] occupation [when [you/he] left that employer]? What sort of work [do/does/did] [you/he] do? What [are/were] [your/his] most important activities or duties? (OPENEND)

BC21. What kind of business or industry [is/was] that in? (OPENEND)

BC22. [Are/Were/Is/Was] [you/HEAD] self-employed, [are/were/is] [you/he] employed by someone else, or what?

3. SELF-EMPLOYED ONLY

2. BOTH SOMEONE ELSE AND SELF

1. SOMEONE ELSE ONLY

8. DK

9. NA

GO TO BC25

BC23. [Is/Was] that an unincorporated business or a corporation?

1. UNINCORPORATED

2. CORPORATION

BC24. [Do you/ Did HEAD] work for the federal, state, or local government, a private company, or what?

1. FEDERAL GOV'T

2. STATE GOV'T

3. LOCAL GOV'T

4. PRIVATE NON-GOV'T

7. OTHER (SPECIFY)

BC25. CAI CHECKPOINT (VAR=BC25CKPT)

SEE BC18 AND BC22--WHETHER CMJ AND WHETHER WORKS FOR SELF

CMJ, WORKS FOR SOMEONE ELSE (BC18CMJ=1 AND BC22=1)

CMJ, WORKS FOR SELF (BC18CMJ=1 AND BC22 NE 1)

ALL OTHERS

GO TO BC42

BC25a. About how many people are employed by [Employer’s Name] at the location were you work?

9 DIGITS

GO TO BC26

BC25b. Are there 200 or more?

1. YES

5. NO

8. DK

9. RF

BC25c. 500 or more?

1. YES

5. NO

GO TO BC26

BC25d. 1000 or more?

1. YES

5. NO

GO TO BC26

BC25e. 1000 or more?

1. YES

5. NO

GO TO BC26

BC25f. 1000 or more?

1. YES

5. NO

GO TO BC26
BC26. Is [your/his] current job covered by a union contract?

1. YES  
5. NO  
GO TO BC28A

BC27. [Do you/Does HEAD] belong to that labor union?

1. YES  
5. NO  
GO TO BC28A

BC28. INTERVIEWER: IS HEAD A FARMER OR RANCER?

1. YES  
5. NO  
GO TO BC28A

BC28a. And would you say [your /his] work requires the use of a computer—All of the time, Most of the time, Some of the time, or None of the time?

1. ALL OF THE TIME  
2. MOST OF THE TIME  
3. SOME OF THE TIME  
4. NONE OF THE TIME
BC29. (On [your/his] main job for [NAME OF EMPLOYER],) are [you/HEAD] salaried, paid by the hour, or what?

<table>
<thead>
<tr>
<th>1. SALARIED</th>
<th>2. SALARY + COMMISSION</th>
<th>3. PAID BY HOUR</th>
<th>4. HOURLY + TIPS</th>
<th>6. HOURLY + COMMISSION</th>
<th>7. OTHER</th>
<th>D/RF</th>
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GO TO BC33

GO TO BC40

BC30. How much is [your/his] salary?

(TWO VARS: BC30 IS 10 DIGITS--XXXXXXX.YY; BC30PER IS TPERWK)

BC31. If [you were/he was] to work more hours than usual during some week, would [you/he] get paid for those extra work?

1. YES
5. NO

GO TO BC35

BC32. About how much would you make per hour for those extra hours?

<table>
<thead>
<tr>
<th>1. TIME AND A HALF</th>
<th>2. DOUBLE TIME</th>
<th>3. STRAIGHT TIME</th>
<th>4. COMP TIME</th>
</tr>
</thead>
</table>

5. EXACT AMOUNT (SPECIFY)

(3 VARS - BC32A 10-DIGIT XXXXXXX.YY, BC32aPER=TPERALL, BC32aPERSPEC=STRING 100)

GO TO BC35
BC33. What is [your/his] hourly wage rate for [your/his] regular work time?

$ 6-DIGIT (XXX.YY) PER HOUR

BC34. What is [your/his] hourly wage rate for overtime?

ENTER all that apply

1. TIME AND A HALF
2. DOUBLE TIME
3. STRAIGHT TIME
4. COMP TIME
5. EXACT AMOUNT (SPECIFY)
7. OTHER (SPECIFY)

(Amount for Code 5: Two variables: BC34A IS 10 DIGITS, XXXXXXX.YY, AND BC34APER IS TPERALL)

BC35. INTERVIEWER CHECKPOINT

SEE BC29--WHETHER TIPS OR COMMISSIONS

"HOURLY + TIPS" IS CHECKED
BC29=4

"SALARY + COMMISSION" OR "HOURLY + COMMISSION IS CHECKED
BC29=2, 6

BC36. How much are [your/his] tips, on average?
(TWO VARIABLES: BC36 IS 8 DIGITS, XXXXXX.YY; BC36PER IS TPERALL)

GO TO BC40

BC37. How much is [your/his] commission on average?
(TWO VARIABLES BC37 IS 7 DIGITS; BC37PER IS TPERWK)

BC40. INTERVIEWER CHECKPOINT

SEE BC22--WHETHER SELF EMPLOYED

A. HEAD WORKS FOR SOMEONE ELSE ONLY (BC22=1)

B. ALL OTHERS → GO TO BC42

BC41. How many years' experience do [you /HEAD] have altogether with [your/his] present employer?
(3 VARIABLES--BC41YRS, BC41MOS, BC41WKS, ALL 2-DIGIT)
BC42. INTERVIEWER CHECKPOINT

SEE EHC INDICATORS--WHETHER WORKED DURING 2006

WORKED FOR THIS EMPLOYER DURING 2006) (BCWTR2006=1)

ALL OTHERS

GO TO BC47

BC42A. How many weeks out of the year did [you/HEAD] actually work on this job in 2006, not including any time off that you told me about earlier? (4 DIGITS, 1.0-52.0 & 97.0)

If R says: "Every week except what (I/he) took off", ENTER "97.0"

BC43. On average, how many hours a week did [you/he] work on this job in 2006? (3 DIGITS, 1-112)

BC44. Did (you/he) work any overtime which isn't included in that?

1. YES 5. NO

GO TO BC46

BC45. How many hours did that overtime amount to in 2006?

(TWO VARIABLES: BC45 IS 4 DIGITS; BC45PER IS TPERWK)

BC46. About how much did [you/he] make at this in 2006?

(TWO VARIABLES: BC46 IS 10 DIGITS--XXXXXX.YY; BC46PER IS TPERALL)

BC47. INTERVIEWER CHECKPOINT

SEE EHC INDICATORS--WHETHER WORKED DURING 2005

WORKED FOR THIS EMPLOYER DURING 2005) (BCWTR2005=1)

ALL OTHERS

GO TO BC50

BC47A. How many weeks out of the year did [you/HEAD] actually work on this job in 2005, not including any time off that you told me about earlier? (4 DIGITS, 1.0-52.0 & 97.0)

If R says: "Every week except what (I/he) took off", ENTER "97.0"

BC48. On average, how many hours a week did [you/he] work on this job in 2005? (3 DIGITS--1-112)

BC49. About how much did [you/he] make at this in 2005?

(TWO VARIABLES: BC49 IS 10 DIGITS--XXXXXX.YY; BC49 IS TPERALL)

BC50. INTERVIEWER CHECKPOINT

SEE BC18 AND EHC INDICATORS--WHETHER STOPPED OR MRMJ

IF BCCUR=0 OR JOBTYPE = MRMJ OR (JOBTYPE = OTHERJOB AND BCCUR = 0) (STOPPED WORKING FOR THIS EMPLOYER IN 2005-2007)

ALL OTHERS

GO TO BC52

BC51. Why did [you/he] stop working for [NAME OF EMPLOYER], did the company go out of business, [were you/was he] laid off, did [you/he] quit, or what? (OPENEND)

BC52. INTERVIEWER CHECKPOINT

MORE JOBS FOR EHC

ASK BC19-BC51 FOR EACH ADDITIONAL JOB

ALL OTHERS

GO TO BC53

END OF BCJOBS BLOCK
BC53. INTERVIEWER CHECKPOINT

SEE EHC INDICATOR BCDKJOBS2006--WHETHER CAN'T COMPUTE WEEKS WORKED IN 2006

CANT COMPUTE WEEKS IN 2006
(BCDKJOBS2006=1)  ALL OTHERS
GO TO BC55

BC54. Now, thinking about [your/his] work in 2006, how many weeks did [you/he] actually work on [all of] [your/his] job[s] in 2006, not counting time off for vacations, sick time, unemployment, etc.? (2 DIGITS, 1-52)

BC55. INTERVIEWER CHECKPOINT

SEE EHC INDICATOR BCDKHOURS--WHETHER CAN'T COMPUTE HOURS WORKED IN 2006

CANT COMPUTE HOURS IN 2006
(BCDKHOURS=1)  ALL OTHERS
GO TO BC57

BC56. On average, how many hours a week did [you/he] work during 2006? (3 DIGITS--1-112)

BC57. INTERVIEWER CHECKPOINT

SEE EHC INDICATOR BCDKJOBS2005--WHETHER CAN'T COMPUTE WEEKS WORKED IN 2005

CANT COMPUTE WEEKS IN 2005
(BCDKJOBS2005=1)  ALL OTHERS
GO TO BC59

BC58. Now thinking about [the year before,] 2005, how many weeks did [you/he] work on [all of] [your/his] job[s] in 2005? (2 DIGITS, 1-52)

BC59. INTERVIEWER CHECKPOINT

SEE EHC INDICATOR--WHETHER CAN'T COMPUTE HOURS WORKED IN 2005

CANT COMPUTE HOURS IN 2005
(BCDKHOURS=1)  ALL OTHERS
GO TO BC61

BC60. On average, how many hours a week did [you/he] work during 2005? (3 DIGITS, 1-112)
FOR PEOPLE WHO'VE DEFINITELY NOT WORKED AT ALL 2005+:

BC61. INTERVIEWER CHECKPOINT

SEE EHC INDICATOR BCWTRWRK--WHETHER WORKED AT ALL SINCE 01/01/2005

<table>
<thead>
<tr>
<th>HAS NOT WORKED SINCE 01/01/2005 (BCWTRWRK=0)</th>
<th>ALL OTHERS</th>
</tr>
</thead>
</table>

GO TO BC64

BC62. Have [you /HEAD] ever done any work for money?

1. YES 5. NO GO TO BC64

BC63. In what month and year did [you/he] last work?

(TWO VARIABLES: BC63MO USES TMONTH; BC63YR=1901-2007 PLUS SPECIAL CODE BELOW)

IF NECESSARY: What would be your best estimate?

9997. BEFORE 2005, DK EXACT YEAR
FOR EVERYONE, WHETHER WORKING OR NOT--AND IF NOT WORKING, REGARDLESS OF WHEN LAST WORKED!!

BC64.  [Have you /Has HEAD] been looking for [another job/work] during the past four weeks?

1. YES  5. NO  ➔ GO TO SECTION DE

BC65.  What [have you/has he] been doing the last four weeks to find [another job/work]?  [Any others?]

ENTER all that apply

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

07. OTHER (SPECIFY)

08. NOTHING

BC66.  INTERVIEWER CHECKPOINT

SEE BC15--WHETHER HAS CMJ

NO CMJ (BC15=3, 4, 5)  ➔ ALL OTHERS

GO TO SECTION DE

BC67.  How long [have you/has he] been looking for work?

(3 VARIABLES--BC67YRS, BC67MOS, BC67WKS, ALL 2-DIGIT)
SECTION DE: EMPLOYMENT OF WIFE/"WIFE"

ASK FOR PERSON WITH CYUFUF=1, 4 AND CYAQRTH=202, 222. IF NO SUCH PERSON, GO TO SECTION F

NOTE THAT EVENTS FROM A51 AND A52 NEED TO BE LOADED INTO EHC HERE!!

------------------------------------------------------------------------------- END BLAISE2, START EHC2  -----------------------------------------------
------------------------------------------------------------------------------- EMPLOYMENT TAB *------------------------------------------------------------------

DE1. We would like to know about what [you/WIFE/"WIFE"] does—[are you/is she] working now, looking for work, retired, keeping house, a student, or what?

  01. WORKING NOW
  02. ONLY TEMPORARILY LAID OFF, SICK LEAVE OR MATERNITY LEAVE
  03. LOOKING FOR WORK, UNEMPLOYED

  GO TO DE4

  04. RETIRED

  DE2. In what year did (you/she) retire?

        (4 DIGITS 1901-2007)

  05. DISABLED, PERMANENTLY OR TEMPORARILY

  06. KEEPING HOUSE

  07. STUDENT

  08. OTHER (SPECIFY):

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

DE3. [Are you/Is she] doing any work for money now?

        1. YES       5. NO

DE3A. [Have you/Has she] done any work for money since January 1, 2005? Please include any type of work, no matter how small.

        1. YES       5. NO

  GO TO NOT WORKING TAB – DE7

DE4. I’d like to know about all of the work for money that [you/WIFE/"WIFE"] [have/has] done for the past few years, from January 1, 2005, through the present. Please include self-employment and any other kind of work that [you/she] has done for pay. Start with any job that [you/she] has had during this time.

ASK DE5- DE6a FOR EACH EMPLOYER

DE5. What was the name of this employer?

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

        IWER: If no employer name is given by R, ask for job title or anything that can help identify the job.

DE6. When did [WIFE/"WIFE"/you] start and when did [WIFE/"WIFE"/you] stop working for this employer? Please give me all of [WIFE/"WIFE"/your] start and stop dates if [WIFE/"WIFE" has/you have] worked for [this employer/yourself] more than once.

DE6a. Is this a current job?

DE6b. [Has WIFE/"WIFE"/Have you] started a new job this month?

        IF YES, please record info in the last cell of new job line.
DE7. Now I'd like to know about times during 2005 and 2006 in which [WIFE/"WIFE" was /you were] not working at all for pay. First, I'd like to know about any times when [WIFE/"WIFE" was /you were] NOT LOOKING for work, and next I'd like to know about any times when [WIFE/"WIFE" was /you were] LOOKING for work.

Was there any time in 2005 or 2006 when [WIFE/"WIFE"/you] did not have a job and [was/were] not looking for work?

IF YES: When was that?

DE8. Was there any time last year, in 2006, when [WIFE/"WIFE" was /you were] unemployed and looking for work?

(THREE VARS: BC8DAYS=1-365, BC8WKS=1-52, B8MOS=1-12)

IF YES: When was that?
IF DK WHEN: How much time was that in 2005?

DE9. Was there any time in the year before last, in 2005, when [WIFE/"WIFE" was /you were] unemployed and looking for work?

(THREE VARS: BC9DAYS=1-365, BC9WKS=1-52, BC9MOS=1-12)

IF YES: When was that?
IF DK WHEN: How much time was that in 2005?

----------------------------------------------------------------- TIME AWAY TAB ---------------------------------------------------------------

DE10. We're interested in time [WIFE/"WIFE"/you] spent away from work last year, during 2006. Did [WIFE/"WIFE"/you] miss any work because someone else was sick?

(THREE VARS: BC10DAYS=1-365, BC10WKS=1-52, BC10MOS=1-12)

IF YES: When was that?
IF DK WHEN: How much work did [WIFE/"WIFE"/you] miss in 2006?

DE11. Did [WIFE/"WIFE"/you] miss any work because [WIFE/"WIFE" was /you were] sick?

(THREE VARS: BC11DAYS=1-365, BC11WKS=1-52, BC11MOS=1-12)

IF YES: When was that?
IF DK WHEN: How much work did [WIFE/"WIFE"/you] miss in 2006?

DE12. Did [WIFE/"WIFE"/you] take vacation or time off?

(THREE VARS: BC12DAYS=1-365, BC12WKS=1-52, BC12MOS=1-12)

IF YES: When was that?
IF DK WHEN: How much time off did [WIFE/"WIFE"/you] take in 2006?

DE13. Did [WIFE/"WIFE"/you] miss any work because [WIFE/"WIFE" was /you were] on strike?

(THREE VARS: BC13DAYS=1-365, BC13WKS=1-52, BC13MOS=1-12)

IF YES: When was that?
IF DK WHEN: How much work did [WIFE/"WIFE"/you] miss in 2006?

DE14 Did [WIFE/"WIFE"/you] miss any work because [WIFE/"WIFE" was /you were] temporarily laid off from work?

(THREE VARS: BC14DAYS=1-365, BC14WKS=1-52, BC14MOS=1-12)

IF YES: When was that?
IF DK WHEN: How much work did [WIFE/"WIFE"/you] miss in 2006?

--------------------------------- END TIME AWAY TAB AND EHC2 HERE; GO TO BLAISE3 ---------------------------------------
QUESTIONS ARE FOR PERSON WITH CYFUFU=1, 4 AND CYAQRTH=202, 222; INCLUDE AQSN ON ALL OUTPUT FILES FROM THIS SECTION. VARNAME=DEAQSN.

EXPORTED DUMMIES FROM EHC:
DEWTRWRK=1 IF DE3=0, 1; IF 5,8,9 THEN = 0. MEANS WHETHER WORKED SINCE 01/01/2005.

THEN, FOR EACH JOB, WE GET:
DEJOBNUM (A SEQUENTIAL ID, UNCLEAR WHAT THE MAX WE SHOULD ALLOW IS. 10 SEEMS SUFFICIENT);
DEEMPNAME (EMPLOYER NAME, NEEDED FOR FILL/IWER REFERENCE);
DEWTR2005 (WHETHER EMPLOYED DURING 2005 FOR THIS EMPLOYER--CODES=1 & 0);
DEWTR2006 (WHETHER EMPLOYED DURING 2006 FOR THIS EMPLOYER--CODES=1 & 0);
DEWTR2007 (WHETHER EMPLOYED DURING 2007 FOR THIS EMPLOYER--CODES=1 & 0);
DECUR (WHETHER CURRENTLY WORKING FOR THIS EMPLOYER--CODES=1 & 0);
DEMOSTREC (WHETHER MOST RECENT EMPLOYER--CODES=1 & 0; NOTE THAT IF ANY JOB IS MARKED AT DECUR, THEN THIS VARIABLE IS ALWAYS ZERO FOR ANY JOBS THAT HAVE ENDED);
DEACCDATE (WHETHER START [AND STOP DATE, IF APPLICABLE] ARE KNOWN TO MONTH LEVEL--CODES=1 & 0);

OVERALL INDICATORS FOR ASKING "GROUP" WEEKS AND HOURS QUESTIONS:
DEDJJOBS2006 (WORKED BUT NO JOBS SPECIFIED, OR JOB LISTED BUT NA YEAR OR MONTH START-STOP, OR TIME-OFF COMPONENTS NA--CODES 1 & 0)
DEDJJOBS2005 (WORKED BUT NO JOBS SPECIFIED, OR JOB LISTED BUT NA YEAR OR MONTH START-STOP--CODES 1 & 0)
DEDKJOBS2005 (WORKED BUT NO JOBS SPECIFIED, OR JOB LISTED BUT HAS NA START-STOP YEAR--CODES 1 & 0).

DE15. INTERVIEWER CHECKPOINT

SEE EXPORTED EHC VARS DEWTRWK, DECUR AND DEMOSTREC -- WHETHER ANY EMPLOYERS AND CMJ/MRMJ INDICATORS

DE16. You have just told me that [you/WIFE/"WIFE"] [are/is] working now for more than one employer. Which one of these jobs do you consider to be [your/her] main job?

GO TO DE18 AND MARK CMJ

DE17. You mentioned [NUMBER OF JOBS] jobs that ended at the same time-- [EMPLOYER NAMES.] Which one of these jobs [do you/does [WIFE/"WIFE"]] consider to have been [your/her] main job?

GO TO DE18 AND MARK MRMJ
DEJOBS BLOCK (ID'S=AQCASE, DEAQSN, DEJOBNUM):

DE18. JOB #: ________ EMPLOYER NAME: __________ CMJ/MRMJ? ________
(3 VARS: DEJOBNUM, 2 DIGITS; DE18EMPNAME, 25 CHARACTERS; DE18CMJ=1 FOR CMJ, 2 FOR MRMJ, 3 FOR OTHER JOB)

DE19. INTERVIEWER CHECKPOINT

SEE START-STOP INDICATORS FROM EHC--DEWTR2006 AND DEWTR2007

1. WORKED DURING 2006 OR 2007 ON THIS JOB (DEWTR2006=1 OR DEWTR2007=1)

5. ALL OTHERS

DE20. Now I have a few questions about each of the jobs you have told me about. In [your /WIFE/'WIFE'S"] work for [EMPLOYER NAME], what [is/was] [your/her] occupation [when [you/she] left that employer]? What sort of work [do/does/did] [you/she] do? What [are/were] [your/her] most important activities or duties? (OPENEND)

DE21. What kind of business or industry [is/was] that in? (OPENEND)

DE22. (Are/Is/Was) [you/she] self-employed, [are/is/was] [you/she] employed by someone else, or what?

3. SELF-EMPLOYED ONLY

2. BOTH SOMEONE ELSE AND SELF

1. SOMEONE ELSE ONLY

8. DK

9. NA

GO TO DE25

DE23. [Is/Was] that an unincorporated business or a corporation?

1. UNINCORPORATED

2. CORPORATION

DE24. [Do you/ Did she] work for the federal, state, or local government, a private company, or what?

1. FEDERAL GOV'T

2. STATE GOV'T

3. LOCAL GOV'T

4. PRIVATE NON-GOV'T

7. OTHER (SPECIFY)

DE25. INTERVIEWER CHECKPOINT

SEE DE18 AND DE22--WHETHER CMJ AND WHETHER WORKS FOR SELF

CMJ, WORKS FOR SOMEONE ELSE (DE18CMJ=1 AND DE22=1)

CMJ, WORKS FOR SELF (DE18CMJ=1 AND DE22 NE 1)

ALL OTHERS

GO TO DE42

DE25a. About how many people are employed by [Employer’s Name] at the location were you work?

9 DIGITS

GO TO DE26

DE25b. Are there 200 or more?

1. YES

5. NO

8. DK

9. RF

DE25c. 100 or more?

1. YES

5. NO

DE25d. 50 or more?

1. YES

5. NO

GO TO DE26

DE25e. 500 or more?

1. YES

5. NO

DE25f. 1000 or more?

1. YES

5. NO

GO TO DE26

GO TO DE26
DE26 CAI CHECKPOINT

SEE DE25 INTERVIEWER CHECKPOINT--WHETHER CMJ AND WHETHER WORKS FOR SELF

CMJ, WORKS FOR SOMEONE ELSE (DE18CMJ=1 AND DE22=1)
CMJ, WORKS FOR SELF (DE18CMJ=1 AND DE22 NE 1)

DE26. Is [your/her] current job covered by a union contract?
   1. YES  5. NO  GO TO DE28A

DE27. [Do you/Does WIFE/"WIFE"] belong to that labor union?
   1. YES  5. NO

GO TO DE28A

DE28a. And would you say [your/her] work requires the use of a computer—All of the time, Most of the time, Some of the time, or None of the time?


(DE28. SKIPPED ON PURPOSE!!)
24

DE29.  [On [your/her] main job for [NAME OF EMPLOYER],]  [are you/is WIFE/"WIFE"] salaried, paid by the hour, or what?

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

GO TO DE33

GO TO DE40

DE30.  How much is [your/her] salary?

(TWO VARS: DE30 IS 10 DIGITS--XXXXXXX.YY; DE30PER IS TPERWK)

DE31.  If [you were/she was] to work more hours than usual during some week, would [you/she] get paid for those extra hours of work?

1. YES  5. NO  

GO TO DE35

DE32.  About how much would [you/she] make per hour for those extra hours?

1. TIME AND A HALF  2. DOUBLE TIME  3. STRAIGHT TIME  4. COMP TIME

5. EXACT AMOUNT (SPECIFY)

(3 VARS - DE32A 10-DIGIT XXXXXXX.YY, DE32aPER=TPERALL, DE32aPERSPEC=STRING 100)

GO TO DE35

DE38.  How is that?

1. PIECEWORK, HOURLY + PIECEWORK/ PRODUCTION

2. COMMISSION

5. SELF-EMPLOYED, FARMER, "PROFITS"--DRAW ON ACCOUNT

6. BY THE JOB/DAY/MILE

7. OTHER (SPECIFY)

DE39.  If (you/she) worked and extra hour, how much would (you/she) earn for that hour?

(9 DIGITS--XXXXXX.YY)

$ PER HOUR

GO TO DE40
DE33. What is [your/her] hourly wage rate for [your/her] regular work time?

$ 6-DIGIT (XXX.YY) PER HOUR

DE34. What is [your/her] hourly wage rate for overtime?

ENTER all that apply

1. TIME AND A HALF
2. DOUBLE TIME
3. STRAIGHT TIME
4. COMP TIME
5. EXACT AMOUNT (SPECIFY)
7. OTHER (SPECIFY)

(Amount for Code 5: Two variables: DE34A is 10 digits, XXXXXXX.YY, and DE34APER is TPERALL)

DE35. INTERVIEWER CHECKPOINT

SEE DE29--WHETHER TIPS OR COMMISSIONS

"HOURLY + TIPS" IS CHECKED
DE29=4

"SALARY + COMMISSION" OR "HOURLY + COMMISSION IS CHECKED
DE29=2, 6

ALL OTHERS
GO TO DE40

DE36. How much are [your/her] tips, on average?
(B17B) (Two variables: DE36 is 8 digits, XXXXX.YY; DE36PER is TPERALL)
GO TO DE40

DE37. How much is [your/her] commission on average?
(B17C) (Two variables DE37 is 7 digits; DE37PER is TPERWK)

DE40. INTERVIEWER CHECKPOINT

SEE DE22--WHETHER SELF EMPLOYED

A. WIFE/"WIFE" WORKS FOR SOMEONE ELSE ONLY (DE22=1)

B. ALL OTHERS
GO TO DE42

DE41. How many years' experience [do you/does WIFE/"WIFE"] have altogether with [your/her] present employer?
(3 VARIABLES--DE41YRS, DE41MOS, DE41WKS, ALL 2-DIGIT)
DE42. INTERVIEWER CHECKPOINT

SEE EHC INDICATORS--WHETHER WORKED DURING 2006
WORKED FOR THIS EMPLOYER DURING 2006) (DEWTR2006=1) ALL OTHERS
GO TO DE47

DE42A. How many weeks out of the year did [you/WIFE/"WIFE"] actually work on this job in 2006, not including any
time off that you told me about earlier? (4 DIGITS-- 1.0-52.0 & 97.0)
If R says: "Every week except what (I/she) took off", ENTER "97.0"

DE43. On average, how many hours a week did [you/she] work on this job in 2006? (3 DIGITS, 1-112)

DE44. Did [you/she] work any overtime which isn't included in that?

1. YES  5. NO GO TO DE46

DE45. How many hours did that overtime amount to in 2006?
(TWO VARS: DE45 IS 4 DIGITS; DE45PER IS TPERWK)

DE46. About how much did [you/she] make at this in 2006?
(TWO VARS: DE46 IS 10 DIGITS--XXXXXX.YY; DE46PER IS TPERALL)

DE47. INTERVIEWER CHECKPOINT

SEE EHC INDICATORS--WHETHER WORKED DURING 2005
WORKED FOR THIS EMPLOYER DURING 2005) (DEWTR2005=1) ALL OTHERS
GO TO DE50

DE47A. How many weeks out of the year did [you/WIFE/"WIFE"] actually work on this job in 2005, not including any
time off that you told me about earlier? (4 DIGITS-- 1.0-52.0 & 97.0)
If R says: "Every week except what (I/she) took off", ENTER "97.0"

DE48. On average, how many hours a week did [you/she] work on this job in 2005? (3 DIGITS, 1-112)

DE49. About how much did [you/she] make at this in 2005?
(TWO VARS: DE49 IS 10 DIGITS--XXXXXX.YY; DE49PER IS TPERALL)

DE50. INTERVIEWER CHECKPOINT

SEE DE18 AND EHC INDICATORS--WHETHER STOPPED OR MRMJ
IF DECCUR=0 OR JOBTYPE = MRMJ OR (JOBTYPE =
OTHERJOB AND DECUR = 0) (STOPPED WORKING
FOR THIS EMPLOYER IN 2005-2007) ALL OTHERS
GO TO DE52

DE51. Why did [you/she] stop working for [NAME OF EMPLOYER] did the company go out of business, [were
you/was she] laid off, did [you/she] quit, or what? (OPENEND)

DE52. INTERVIEWER CHECKPOINT

MORE JOBS FOR EHC ALL OTHERS
ASK DE19-DE51 FOR EACH ADDITIONAL JOB GO TO DE53

END OF DEJOBS BLOCK
DE53. INTERVIEWER CHECKPOINT

SEE EHC INDICATOR DEDKJOBS2006--WHETHER CAN'T COMPUTE WEEKS WORKED IN 2006

CAN'T COMPUTE WEEKS IN 2006
(DEDKJOBS2006=1)  ALL OTHERS
GO TO DE55

DE54. Now, thinking about [your/her] work in 2006, how many weeks did [you/she] actually work on [all of] [your/her] job[s] in 2006, not counting time off for vacations, sick time, unemployment, etc.? (2 DIGITS, 1-52)

DE55. INTERVIEWER CHECKPOINT

SEE EHC INDICATOR DEDKJOBS2005--WHETHER CAN'T COMPUTE WEEKS WORKED IN 2005

CAN'T COMPUTE WEEKS IN 2005
(DEDKJOBS2005=1)  ALL OTHERS
GO TO DE59

DE56. On average, how many hours a week did [you/she] work during 2006? (3 DIGITS, 1-112)

DE57. INTERVIEWER CHECKPOINT

SEE EHC INDICATOR DEDKJOBS2005--WHETHER CAN'T COMPUTE WEEKS WORKED IN 2005

CAN'T COMPUTE WEEKS IN 2005
(DEDKJOBS2005=1)  ALL OTHERS
GO TO DE59

DE58. Now thinking about [the year before.] 2005, how many weeks did [you/she] work on [all of] [your/her] job[s] in 2005? (2 DIGITS, 1-52)

DE59. INTERVIEWER CHECKPOINT

SEE EHC INDICATOR--WHETHER CAN'T COMPUTE HOURS WORKED IN 2005

CAN'T COMPUTE HOURS IN 2005
(DEDKHOURS=1)  ALL OTHERS
GO TO DE61

DE60. On average, how many hours a week did [you/she] work during 2005? (3 DIGITS, 1-112)
FOR PEOPLE WHO'VE DEFINITELY NOT WORKED AT ALL 2005+:

DE61. INTERVIEWER CHECKPOINT

SEE EHC INDICATOR DEWTRWRK--WHETHER WORKED AT ALL SINCE 01/01/2005

HAS NOT WORKED SINCE 01/01/2005 (DEWTRWRK=0)  ALL OTHERS

GO TO DE64

DE62. [Have you/Has WIFE/"WIFE"] ever done any work for money?

1. YES  5. NO  GO TO DE64

DE63. In what month and year did [you/she] last work?

(TWO VARIABLES: DE63MO USES TMONTH; DE63YR=1901-2007 PLUS SPECIAL CODE BELOW)

IF NECESSARY: What would be your best estimate?

9997. BEFORE 2005, DK EXACT YEAR
FOR EVERYONE, WHETHER WORKING OR NOT--AND IF NOT WORKING, REGARDLESS OF WHEN LAST WORKED!!

DE64. [Have you /Has WIFE/"WIFE"] been looking for [another job/work] during the past four weeks?

1. YES  5. NO  GO TO SECTION F

DE65. What [have you/has she] been doing the last four weeks to find [another job/work]? (Any others?)

ENTER all that apply

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
07. OTHER (SPECIFY)
08. NOTHING

DE66. INTERVIEWER CHECKPOINT

SEE DE15--WHETHER HAS CMJ

NO CMJ (DE15=3, 4, 5)  ALL OTHERS

GO TO SECTION F

DE67. How long [have you/ has she] been looking for work?
(3 VARIABLES—DE67YRS, DE67MOS, DE67WKS, ALL 2-DIGIT)
SECTION F: HOUSEWORK, CHILD CARE, FOOD, VEHICLES AND EXPENSES

F1. Now I have a few questions about housework and food costs.

F1a. INTERVIEWER CHECKPOINT

SEE FU LISTING

HEAD IS MALE
CYFUHU=1, 4 AND CYAQRTH=101

3. HEAD IS FEMALE
CYFUHU=1, 4 AND CYAQRTH=102

1. WIFE/"WIFE" IN FU NOW
(SOMEONE HAS CYFUHU=1, 4 AND CYAQRTH=202,222)

2. NO WIFE/"WIFE" IN FU NOW
GO TO F3

F2. About how much time [do you/does WIFE/"WIFE"] spend on housework in an average week? I mean time spent cooking, cleaning, and doing other work around the house. (3-DIGIT; VALUES=1-112)

Housework hours per week

F3. About how much time [do you/does HEAD] spend on housework in an average week? (I mean time spent cooking, cleaning, and doing other work around the house.) (3-DIGIT; VALUES=1-112)

Housework hours per week

F4. INTERVIEWER CHECKPOINT

SEE FU LISTING--COUNT NUMBER OF PERSONS WITH CYFUHU=1, 4

A. TWO OR MORE PERSONS IN FU

B. ONLY ONE PERSON IN FU

GO TO F6

F5. How many days a week does the family sit down and eat the main meal of the day together? (1-DIGIT ACTUAL NUMBER OF DAYS; 0=None is VALID CODE)
F6. INTERVIEWER CHECKPOINT: WHETHER ANY CHILD IN FU IS NOW AGE 6 THROUGH 19

A. CHILD AGED 6-19  B. ALL OTHERS  GO TO F6h

F6a (R80). During 2006, did [NAME/any child in the family between 5 and 18 years old] receive free or reduced-cost lunches at school?

1. YES  5. NO

F6b (R81). (During 2006,) did [NAME/any child in the family between 5 and 18 years old] receive free or reduced-cost breakfasts at school?

1. YES  5. NO

F6c. INTERVIEWER CHECKPOINT: WHETHER ANY CHILD IN FU IS NOW UNDER AGE 16

1. CHILD AGED 15 YRS OR YOUNGER  5. ALL OTHERS  GO TO F6h

F6d (F7). How much did you [and your family living there] pay for child care in 2006?

$ 6 DIGITS PER  
F6DPer. (TPERMO)  3. WEEK  5. MONTH  6. YEAR  7. OTHER – SPECIFY (F6DPerSpec)

F6D2. For which months in 2006 was that? (MULTIMENTION USING TMOSTRING)

F6e (F7a). Was any child enrolled in a day care center or family day care home in 2006?

1. YES  5. NO  GO TO F6h

F6f (F7b). Were meals or snacks provided in any of these day care arrangements (attended last year)?

1. YES  5. NO  GO TO F6h

F6g (F7c). Did that day care center or family day care home participate in any government-sponsored food program, such as the Child and Adult Care Food Program?

1. YES  5. NO
F6h. INTERVIEWER CHECKPOINT: WHETHER ANY FEMALE IN FU IS NOW AGED 16-46 OR ANY CHILD IS AGED 5 YRS OR YOUNGER

1. FEMALE AGED 16-46 OR CHILD AGE 5 OR YOUNGER
5. ALL OTHERS

GO TO F7

F6i (R83). And during 2006, did anyone in [your/the] family get food through the WIC program?

1. YES
5. NO

F7 (F7d). [Was any adult/Were you] enrolled in an adult day care center in 2006?

1. YES
5. NO

GO TO F7b

F7a (F7g). How much did [you/they] pay for that adult day care (center) in 2006?
(SIX DIGITS)

F7b. INTERVIEWER CHECKPOINT: WHETHER ANYONE IN FU IS 61 YEARS OR OLDER

Using FU2006 [I]. AgeIWDate = >60

1. ANY FU MEMBER 61 YEARS OR OLDER
5. ALL OTHERS

GO TO F8

F7c (R78). During 2006, did you [or anyone in your family] receive free or reduced-cost meals for the elderly?

1. YES
5. NO

F8. Did you [or anyone else in your family] receive food stamp benefits, that is, either food stamps or a food stamp benefit card, at any time in 2005, two years ago?

1. YES
5. NO

GO TO F11

(TWO VARIABLES: F9 IS 6 DIGITS, F9PER USES TPERWK)

F10. During which months was that?
(MULTIMENTION F10x USING TMOSTRING)
F11. Did you [or anyone else in your family] receive food stamp benefits, (that is, either food stamps or a food stamp benefit card,) at any time last year, in 2006?

1. YES → GO TO F14
5. NO → GO TO F14

F12. How much did [you/they] receive (in food stamp benefits) in 2006?
(TWO VARIABLES: F12 IS 6 DIGITS, F12PER USES TPERWK)

F13. During which months was that?
(MULTIMENTION F13x USING TMOSTRING)

F14. Did you [or anyone else now living in your family] use food stamp benefits this year?

1. YES → GO TO F18F22
5. NO → GO TO F18F22

F14a. During which months of 2007 was that?
(MULTIPLE MENTION F14Ax, CODES ARE TMOSTRING)

F15. How many members of [your/the] family were covered (by food stamp benefits)?
(ONE-DIGIT: 1-6=ACTUAL NUMBER; 7=7 OR MORE)

F16. How much did [you/they] receive (in food stamp benefits) this year?
(TWO VARIABLES: F16=6-DIGIT, F16PER USES TPERWK)

F17. In addition to what [you/they] buy with food stamp benefits, do you [or anyone else in your family] spend any money on food that you use at home?

1. YES → GO TO F19F23
5. NO → GO TO F19F23

F18F22. (IF HAS FOOD STAMPS, ASK: How much do you spend on that food in an average week?
IF NO FOOD STAMPS, ASK: How much do you [and everyone else in your family] spend on food that you use at home in an average week?)
(TWO VARIABLES: F18F22=8 DIGITS, XXXXX.YY; F18F22PER=TPERMO)

If R lives with non-FU members, PROBE: Is that only your (FU’s) share of the food?

F19F23. Do you have any food delivered to the door which isn't included in that?

1. YES → GO TO F21F25
5. NO → GO TO F21F25

F20F24. How much do you spend on that food?
(TWO VARIABLES: F20F24=8 DIGITS, XXXXX.YY; F20F24PER=TPERMO)

F21F25. About how much do you [and everyone else in your family] spend eating out?
(TWO VARIABLES: F21F25=8 DIGITS, XXXXX.YY; F21F25PER=TPERMO)
F47 (V1). These next questions are about personal vehicles and transportation. Do you [or anyone else in your family living there] own or lease a car or other vehicle for personal use?

DO NOT include motorcycles or vehicles used exclusively by INSTITUTIONALS, HU or HUCS people

1. YES 5. NO → GO TO F81

F48 (V2). Altogether, how many vehicles do you [and your family living there] own or lease (for your personal use)?

(2 DIGITS, RANGE=1-10. IF DK, THEN ASSUME MORE THAN 1 VEHICLE AND REPEAT F49 THROUGH F74 FOR THE MAXIMUM OF 3 VEHICLES)

DO NOT include motorcycles or vehicles used exclusively by INSTITUTIONALS, HU or HUCS people

F49 (V2a). I would like to ask a few questions about [that vehicle/those vehicles, starting with the newest]. What is the year? What is the make and model of the vehicle?

(TWO VARIABLES: MODEL/VR IS 4-DIGIT WITH SPECIAL RANGE 1901-2007; CARMAKE, 40 CHARACTERS; AND CARTYPE, VEHICLE ID FROM BLAISE VEHICLE DATABASE [8 DIGITS??].)

F50 (V2b). INTERVIEWER CHECKPOINT

SEE F49--DK/RF TO MAKE OR YEAR

1. MAKE, MODEL OR YEAR IS DK/RF 5. ALL OTHERS → GO TO F52

F51 (V6). Is it a compact, midsize, fullsize, or what?

1. COMPACT 2. MIDSIZE 3. FULLSIZE 7. OTHER (SPECIFY)

F52 (V7). Who usually drives this vehicle?

(TWO-DIGIT VARIABLE CYA/QSN FROM FU LISTING OF DRIVER; DISPLAY NAME, RTH, FUHU)

90. DRIVER IS INST /HU /HUCS /MO /DIED
91. DRIVER IS NOT IN FU BUT PROVIDES TRANSPORTATION FOR FU
92. DRIVER IS NOT IN FU, DOESN'T PROVIDE TRANSPORTATION FOR FU
93. BOTH HEAD AND WIFE/WHOLE FAMILY ASK: "Who drives it (more/most) often?"
94. CAR NOT BEING DRIVEN; NOT RUNNING; BEING SOLD; BOUGHT FOR SOMEONE IN FU WHO HAS NO LICENSE
95. CAR ONLY USED FOR TRIPS/RECREATIONAL PURPOSES
96. CAR USED FOR BUSINESS PURPOSES

F53 (V8). Did you buy it, lease it, receive it as a gift, or what?

1. BOUGHT 2. LEASED 3. RECEIVED AS A GIFT 7. OTHER (SPECIFY) 8. DK 9. NA → GO TO F60

F54 (V9). Did you [buy/lease/receive/acquire] this vehicle new or used?

1. NEW 2. USED
F55 (V10a). In what year did you [buy/lease/receive/acquire] it?
(RANGE=1901-2007)

2007  2006  2005  7. OTHER YEAR (SPECIFY)  GO TO F57

F56 (V10b). And what month in [YEAR FROM F55] did you [buy/lease/receive/acquire] it?
(F56MO=TMONTH)

F57 (V11). Not counting routine use to get to and from work, is this vehicle also used for business purposes?

1. YES  5. NO  GO TO F60

F58(V11a). Is it used primarily for business purposes?

DEFINITION: More than half of the miles driven per year are for business

1. YES  5. NO

F60 (V13). INTERVIEWER CHECKPOINT

SEE F53 AND F55, WHETHER BOUGHT OR LEASED AND YEAR BOUGHT/LEASED

1. BOUGHT IN 2005 OR LATER  2. LEASED IN 2005 OR LATER  5. ALL OTHERS

GO TO F71  GO TO F75

F61 (V14). What was the total price of the [DESCRIPTION OF CAR]?
(6 DIGITS)

F62 (V15). When you bought this [DESCRIPTION OF CAR] did you trade in or sell a vehicle?

1. YES  5. NO  GO TO F64

F63 (V16). What did you get for the trade-in or sale?
(6 DIGITS)

F64 (V17). How much did you pay down in cash?
(6 DIGITS)

F65 (V18). Did you borrow or finance part of the total price?

1. YES  5. NO  GO TO F75

F66 (V19). How much did you borrow, not including financing charges?
(6 DIGITS)

F67 (V20). How much are your current payments and how often are they made?
(TWO VARIABLES: F67 IS 6 DIGITS, F67PER IS TPERMO)

$6 DIGITS $0. PAID OFF  GO TO F75

F69 (V21). How many payments did you agree to make altogether?
(3 DIGITS)

F70 (V22). How many payments have you made?
(3 DIGITS)

GO TO F75
F71 (V24). (And for your [DESCRIPTION OF CAR],) how much was your initial outlay for that lease -- including your down payment and any fees? (6 DIGITS)

F72 (V25). How much are your payments and how often are they made? (TWO VARIABLES: F72, 6 DIGITS, AND F72PER USING TPERMO)

F73 (V26). How many payments did you agree to make altogether? (3 DIGITS)

F74 (V27). How many payments have you made? (3 DIGITS)

F75 (V28). INTERVIEWER CHECKPOINT

SEE F47--WHETHER OWNS ANY VEHICLES.
REASK F49-F74 FOR AS MANY AS THREE VEHICLES TOTAL, THEN GO TO F76

F76 (X0). INTERVIEWER CHECKPOINT

SEE F48--WHETHER OWNS ANY VEHICLES

1. OWNS OR LEASES VEHICLE (F47=1)  5. ALL OTHERS  GO TO F81

F77 (X1). How much do you [and your family living there] pay for car insurance [for all of your vehicles]? (TWO VARIABLES: F77, 6 DIGITS, AND F77PER USING TPERMO)

IF NECESSARY: Please give me your best estimate.

F78 (X2). INTERVIEWER CHECKPOINT

SEE F48, F53 AND F54--NUMBER OF VEHICLES, WHETHER BOUGHT OR LEASED AND YEAR BOUGHT/LEASED

1. HAS AT LEAST ONE VEHICLE BOUGHT OR LEASED BEFORE 2005  5. ALL OTHERS  GO TO F80

F79 (X3). [(Other than the car payments you already told me about,)] how much did you [and your family living there] pay in car payments in [LAST MONTH]? (TWO VARIABLES: F79, 6 DIGITS, AND F79PER USING TPERMO)

INCLUDE vehicle purchase and lease payments not already covered

F80 (X4a). Altogether for the month of [LAST MONTH], how much did you [and your family living there] pay for each of these transportation related expenses? (EACH AMOUNT IS 5 DIGITS)

ENTER to the nearest dollar. If None, ENTER "0".

a. Car repairs or maintenance? (VARNAME=F80A)

b. Gasoline? (VARNAME=F80B)

c. Parking and car pool? (VARNAME=F80C)
F81 (X4d). Altogether for the month of [LAST MONTH], how much did you [and your family living there] pay for each of these transportation related expenses?

(EACH AMOUNT IS 5 DIGITS)

ENTER to the nearest dollar. If None, ENTER "0".

a. Bus fares and train fares? (VARNAME=F81A)
b. Taxicabs? (VARNAME=F81B)
c. Other transportation costs? (VARNAME=F81C)

F81 (X5). [IF ITEM F81c IS GT 0] What were those other costs? (OPENEND)

F82 (X6). In 2006, did you [and your family living there] have any school-related expenses such as:

a. Purchase or rental of books, supplies, uniforms, or equipment including computers and software;
b. Tuition or tutoring (not including any amounts already mentioned for day care or nursery school);
c. Room and board for a family member who is away at school?

1. YES TO ANY EXPENSE ITEM  5. NO  GO TO F87

F83 (X7). How much in total were these expenses? (6 DIGITS)

F84 (X8). In 2006, were there any other school-related expenses not already covered in the previous question?

1. YES  5. NO  GO TO F87

F85(X9). What other types of school-related expenses did you have? (OPENEND)

F86(X10). Altogether, how much were these other expenses? (6 DIGITS)

F87. Next, let me ask you about some other household expenses. Please indicate to the best of your ability, the amount spent on each of these items altogether during 2006. Or, if you prefer, the amount you spent in an average week or month in 2006.

How much did you [and your family living there] spend altogether in 2006on home repairs and maintenance, including materials plus any costs for hiring a professional? (F87PER=TPERMO, F87PerSpec=STRING-100)

$ 6 DIGITS

GO TO F88

DK

RF

F87a. Would it amount to $400 or more?

1. YES  5. NO

F87b. $1000 or more?

1. YES  5. NO

F87c. 100 or more?

1. YES  5. NO

GO TO F88

GO TO F88
F88. (How much did you [and your family living there] spend altogether in 2006,) on household furnishings and equipment, including household textiles, furniture, floor coverings, major appliances, small appliances and miscellaneous housewares? (F88PER=TPERMO, F88PerSpec=STRING-100)

$ 6 DIGITS
GO TO F89

F88a. Would it amount to $500 or more?

1. YES  5. NO

F88b. $1500 or more?

1. YES  5. NO

F88c. 100 or more?

1. YES  5. NO

GO TO F89

F89. How much (did you [and your family living there] spend) altogether in 2006 on clothing and apparel, including footwear, outerwear, and products such as watches or jewelry? (F89PER=TPERMO, F89PerSpec=STRING-100)

$ 6 DIGITS
GO TO F90

F89a. Would it amount to $700 or more?

1. YES  5. NO

F89b. $1500 or more?

1. YES  5. NO

F89c. 200 or more?

1. YES  5. NO

GO TO F90
F90.  (How much did you [and your family living there] spend altogether in 2006,) on trips and vacations, including transportation, accommodations, and recreational expenses on trips?  
(F90PER=TPERMO, F90PerSpec=STRING-100)  

$ 6 DIGITS  
GO TO F90  

F90a. Would it amount to $500 or more?  
1. YES  
5. NO  
8. DK  
9. RF  

F90b. $1500 or more?  
F90c. 200 or more?  
1. YES  
5. NO  
1. YES  
5. NO  

GO TO F91  

F91.  How much (did you [and your family living there] spend) altogether in 2006 on recreation and entertainment, including tickets to movies, sporting events, and performing arts and hobbies including exercise, bicycles, trailers, camping, photography, and reading materials? Do not include costs associate with the trips and vacations you mentioned above.  
(F91PER=TPERMO, F91PerSpec=STRING-100)  

$ 6 DIGITS  
GO TO F90  

F91a. Would it amount to $500 or more?  
1. YES  
5. NO  
8. DK  
9. RF  

F91b. $1500 or more?  
F91c. 200 or more?  
1. YES  
5. NO  
1. YES  
5. NO  

GO TO SECTION G
SECTION G: INCOME

G1. We try to understand how people all over the country are getting along financially, so now I have some questions about earnings and income.

G1a. INTERVIEWER CHECKPOINT

SEE BC28--WHETHER CURRENT MAIN JOB (CMJ) IS FARMER OR RANCHER (COPY FROM THERE)

1. HEAD IS A FARMER OR RANCHER  5. ALL OTHERS → GO TO G5

G2. What were your total receipts from farming in 2006, including soil bank payments and commodity credit loans?

$ (7 DIGITS) A

DO NOT allow negative amounts

G3. What were your total operating expenses, not counting living expenses?

$ (7 DIGITS) B

DO NOT allow negative amounts

G4. That left you a net income from farming of? (A - B =)

$ (7 DIGITS) C

ALLOW negative amounts

G5. Did you [or anyone else in the family there] own a business at any time in 2006 or have a financial interest in any business enterprise?

1. YES  5. NO → GO TO G12

G6. How many businesses or financial interests did [you/they] have in 2006?

1. ONE  2. TWO  3. THREE  4. FOUR  5. FIVE

G7. I’ll be asking this next series of questions about each business separately. We can begin with whichever business you choose.

G7A (G9J2H_W). What kind of business was that? (OPENEND)

G7B (G9J2H_W). What was the name of [the/that] business? (25 CHARACTERS)

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

IWER: If no employer name is given by R, ask for job title or anything that can help identify the job.

G8. Who in the family owned that business?

(CYAQSN LIST; DISPLAY NAME, RTH, FUHU)

INDICATE AQSN'S OF ALL WHO OWN. IF OWNERS NOT ON FAM LISTING, USE CODE 97 AND INCLUDE FURTHER INFO ABOUT WHO THIS IS IN OPENEND.

G9A. Did [you/HEAD] put in any work time for this business in 2006?

PROBE if inconsistent with employment section

1. YES  5. NO → GO TO G9bb
G9B. Did you tell me about this work earlier?

1. YES, THESE WORK HOURS WERE REPORTED  
   5. NO, THESE WORK HOURS WERE NOT REPORTED

GO TO G9bb

G9J1H. Then I would like to ask you some questions now about this business and [your/his] work in it.

G9J3H. What was [your/his] occupation? What sort of work did [you/he] do? What were [your/his] most important activities or duties? (OPENEND)

G9J4H. And, how many weeks did [you/he] work at this business in 2006?  
   (2 DIGITS--1-52)

G9J5H. On the average, how many hours a week did [you/he] work at this business?  
   (3 DIGITS--1-112)

G9J6H. In what month and year did [you/he] start working at this business?  
   (TWO VARS--G9J6HMO WITH TMONTH CODE AND G9J6HYR WITH TYEARSPECNOCY CODE)

G9J7H. In which months during 2006 [were you/was he] working at this business?  
   (G9J7Hx MULTIPLE MENTION WITH TMOSTRING CODE)

G9J8H. [Have you/Has he] stopped working at this business?  

1. YES  
   5. NO

GO TO G9bb

G9J9H. In what month and year was that?  
   (TWO VARS--G9J9HMO WITH TMONTH CODE AND G9J9HYR WITH ONLY CODES BELOW ALLOWED. NOTE THAT 9998 FOR YEAR IS NOT ALLOWED!)

2006  2007  9996.  2006 OR 2007, DK WHICH

G9J10H. What happened--did it go out of business, did [you/he] quit, or what?  
   (OPENEND)

G9BB. INTERVIEWER CHECKPOINT

SEE FU LISTING  
   WIFE/"WIFE" IN FU  
   ALL OTHERS
   GO TO G10

G9C. Did (you/WIFE/"WIFE") put in any work time for this business in 2006?  
   PROBE if inconsistent with employment section

1. YES  
   5. NO

GO TO G10
G9B. Did you tell me about this work earlier?

1. YES, THESE WORK HOURS WERE REPORTED
5. NO, THESE WORK HOURS WERE NOT REPORTED

GO TO G10

G9J1W. Then I would like to ask you some questions now about this business and [your/WF/"WF"] work in it.

G9J3W. What was [your/her] occupation? What sort of work did [you/she] do? What were [your/her] most important activities or duties? (OPENEND)

G9J4W. And, how many weeks did [you/she] work at this business in 2006?
(2 DIGITS--1-52)

G9J5W. On the average, how many hours a week did [you/she] work at this business?
(3 DIGITS--1-112)

G9J6W. In what month and year did [you/she] start working at this business?
(TWO VARS--G9J6WMO WITH TMONTH CODE AND G9J6WYR-TYEARSPECNOCY CODE)

G9J7W. In which months during 2006 [were you/was she] working at this business?
(MULTIPLE MENTION WITH TMOSTRING CODE)

G9J8W. [Have you/Has she] stopped working at this business?

1. YES
5. NO

GO TO G10

G9J9W. In what month and year was that?
(TWO VARS--G9J9WMO WITH TMONTH CODE AND G9J9WYR WITH ONLY CODES BELOW ALLOWED. NOTE THAT 9998 FOR YEAR IS NOT ALLOWED!)

2006
2007
9996. 2006 OR 2007, DK WHICH

G9J10W. What happened--did it go out of business, did [you/she] quit, or what?
(OPENEND)

G10. (Please remind me,) was it a corporation or an unincorporated business?

1. CORPORATION
2. UNINCORPORATED
7. OTHER (SPECIFY)
8. DK / 9. RF

GO TO G11c
GO TO G11

G11. What were the total receipts from the business?

$ (7 DIGITS)  A
DO NOT allow negative amounts

G11A. What were the total operating expenses, not counting living expenses?

$ (7 DIGITS)  B
DO NOT allow negative amounts

G11B. That left a net income of? (A - B =)

$ (7 DIGITS)  C
ALLOW negative amounts
G11C. INTERVIEWER CHECKPOINT

SEE G6 ABOVE--NUMBER OF BUSINESSES

ONLY ONE BUSINESS  TWO OR MORE BUSINESSES  REPEAT G7a-G11b FOR EACH ADDITIONAL BUSINESS, THEN TO G12

G12. Did you [HEAD] earn wages or salaries in 2006 from working on any jobs [besides the unincorporated business we have just talked about]?

IF NECESSARY, review employment history and ADD: including wages or salaries from the job(s) we already talked about?

1. YES  5. NO  GO TO G12CKPT

G13. How much did you [HEAD] earn altogether from wages or salaries in 2006, that is, before anything was deducted for taxes or other things?

$ (7 DIGITS)

G14. In addition to this, did [you/he] have any income from bonuses, overtime, tips, or commissions?

1. YES  5. NO

GO TO G16a  GO TO G17f

G12CKPT. INTERVIEWER CHECKPOINT – NO INCOME FOR 2006

JOB REPORTED IN EHC FOR HEAD IN 2006  NO JOB REPORTED IN EHC & G9A/G10 = HEAD DID NOT WORK FOR UNINCORPORATED BIZ, BUT G9A/G10 = HEAD WORKED FOR INCORPORATED BIZ IN 2006  ALL OTHERS

G12Signal. HEAD WORKED IN 2006 BUT HAS NO WAGES OR SALARY IN G12

PROBE: [WasWere] there any wage(s) or salary(s) from [this job/these jobs]?

1. YES  5. NO  RETURN TO G12

G16. Did [you/he] have any income from bonuses, overtime, tips or commissions?

1. YES  5. NO  GO TO G18a

G16a. Which was that?

ENTER all that apply

1. BONUSES  2. OVERTIME  3. TIPS  4. COMMISSIONS  7. OTHER (SPECIFY)

G17a. How much was from …

a. Bonuses?  (6 DIGITS)
b. Overtime?  (6 DIGITS)
c. Tips?  (6 DIGITS)
d. Commissions?  (6 DIGITS)
e. Other job related income?  (6 DIGITS)

G16b. What was that from? (OPENEND)
INTERVIEWER CHECKPOINT (VARNAME=G17FCKPT)

Reported incomes:
[Wages/salaries, Overtime, Bonus, Tips, Commissions, Other job-related income]

Were ALL jobs for the above incomes reported (see Employers list below)?

PROBE: Did you tell me earlier about the job or jobs that go with [this/these] income[s]?

The jobs we talked about were:

READ Employers Head worked for in 2006:
[List of EHC1 EMPLOYERS]

1. YES, R REPORTED ALL JOBS THAT PRODUCED THIS INCOME
5. NO, R DID NOT REPORT ALL JOBS THAT PRODUCED THIS INCOME

GO TO G18a

G17J1. Then I would like to ask you some questions now about the work [you/he] did for this income. Did [you/he] work for the federal, state or local government, a private company, or what?

1. FEDERAL GOV'T
2. STATE GOV'T
3. LOCAL GOV'T
4. PRIVATE NON-GOV'T
5. SELF-EMPLOYED
7. OTHER (SPECIFY)

G17J2. What was the name of that employer? (25 CHARACTERS)

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

IWER: If no employer name is given by R, ask for job title or anything that can help identify the job.

G17J3. What was [your/his] occupation? What sort of work did [you/he] do? What were [your/his] most important activities or duties? (OPENEND)

G17J3b. What kind of business or industry was that in? (OPENEND)

G17J4. And, how many weeks did [you/he] work at this in 2006?
(2 DIGITS--1-52)

G17J5. On the average, how many hours a week did [you/he] work?
(3 DIGITS--1-112)

G17J6. In what month and year did [you/he] start this work?
(TWO VARS--G17J6MO WITH TMONTH CODE AND G17J6YR WITH TYEARSPECOCY CODE)

G17J7. In which months during 2006 [were you/was he] working at it?
(MULTIPLE MENTION, G17J7x, WITH TMOSTRING CODE)

G17J8. [Have you/Has he] stopped this work?

1. YES 5. NO

GO TO G18a

G17J9. In what month and year was that?
(TWO VARS--G17J9MO WITH TMONTH CODE AND G17J9YR WITH ONLY CODES BELOW ALLOWED. NOTE THAT 9998 FOR YEAR IS NOT ALLOWED!)

2006 2007 9996. 2006 OR 2007, DK WHICH

G17J10. What happened--did [your/his] employer close or go out of business, did [you/he] quit, or what? (OPENEND)
G18a. I'm going to read you a list of other sources of income you might have had. Did you [HEAD] receive any other income in 2006 from professional practice or trade?

1. YES  5. NO → GO TO G18b

G19a. How much was it?

(TWO VARIABLES: A 7-DIGIT FIELD, G19A, AND A TIME UNIT, G19APER, USING TPERDAY CODE)

G20a. During which months of 2006 did [you/he] get this income?

(MULTIPLE MENTION G20Ax, CODES ARE TMOSTRING)

G21a. INTERVIEWER CHECKPOINT --WHETHER WORK HOURS FOR THIS INCOME WERE REPORTED

Reported incomes:
Professional practice or trade

Were ALL jobs for the above incomes reported (see Employers list below)?

PROBE: Did you tell me earlier about the job or jobs that go with [this/these] income[s]?
The jobs we talked about were:

READ Employers Head worked for in 2006:
[LIST OF EHC1 EMPLOYERS]

1. YES, R REPORTED ALL JOBS THAT PRODUCED THIS INCOME
5. NO, R DID NOT REPORT ALL JOBS THAT PRODUCED THIS INCOME

GO TO G18b

G18aJ1. Then I would like to ask you some questions now about the work [you/he] did for this income. Did [you/he] work for the federal, state or local government, a private company, or what?

1. FEDERAL GOVT  2. STATE GOVT  3. LOCAL GOVT  4. PRIVATE NON-GOVT  5. SELF-EMPLOYED  7. OTHER (SPECIFY)

G18aJ2. What was the name of that employer? (25 CHARACTERS)

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

IWER: If no employer name is given by R, ask for job title or anything that can help identify the job.

G18aJ3. What was [your/his] occupation? What sort of work did [you/he] do? What were [your/his] most important activities or duties? (OPENEND)

G18aJ3b. What kind of business or industry was that in? (OPENEND)

G18aJ4. And, how many weeks did [you/he] work at this in 2006? (2 DIGITS--1-52)

G18aJ5. On the average, how many hours a week did [you/he] work? (3 DIGITS--1-112)

G18aJ6. In what month and year did [you/he] start this work?

(TWO VARS--G18AJ6MO WITH TMONTH CODE AND G18AJ6YR-TYEARSPECNOCY CODE)

G18aJ7. In which months during 2006 [were you/was he] working at it?

(MULTIPLE MENTION, G18AJ7x, WITH TMOSTRING CODE)

G18aJ8. [Have you/Has he] stopped this work?

1. YES  5. NO → GO TO G18b

G18aJ9. In what month and year was that?

(TWO VARS--G18AJ9MO WITH TMONTH CODE AND G18AJ9YR WITH ONLY CODES BELOW ALLOWED. NOTE THAT 9998 FOR YEAR IS NOT ALLOWED!)

2006  2007  9996. 2006 OR 2007, DK WHICH

G18aJ10. What happened--did [you/he] close or go out of business, did [you/he] quit, or what? (OPENEND)
G18b. [Besides the farm income you already told me about,] (did you [HEAD] receive any other income in 2006) from farming or market gardening?

1. YES  5. NO  GO TO G18c

G19b. How much was it?

(TWO VARIABLES: A 7-DIGIT FIELD, G19B, AND A TIME UNIT, G19BPER, USING TPERDAY CODE)

G20b. During which months of 2006 did [you/he] get this income?

(MULTIPLE MENTION G20Bx, CODES ARE TMOSTRING)

G21b. INTERVIEWER CHECKPOINT --WHETHER WORK HOURS FOR THIS INCOME WERE REPORTED

Reported incomes:
Farming or market gardening

Were ALL jobs for the above incomes reported (see Employers list below)?

PROBE:  Did you tell me earlier about the job or jobs that go with [this/these] income[s]?

The jobs we talked about were:

READ Employers Head worked for in 2006:
[LIST OF EHC1 EMPLOYERS]

1. YES, R REPORTED ALL JOBS THAT PRODUCED THIS INCOME
5. NO, R DID NOT REPORT ALL JOBS THAT PRODUCED THIS INCOME

GO TO G18c

G18bJ1. Then I would like to ask you some questions now about the work [you/he] did for this income.
Did [you/he] work for the federal, state or local government, a private company, or what?

1. FEDERAL GOV’T  2. STATE GOV’T  3. LOCAL GOV’T  4. PRIVATE NON-GOV’T  5. SELF-EMPLOYED  7. OTHER (SPECIFY)

G18bJ2. What was the name of that employer?  (25 CHARACTERS)

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

IWER:  If no employer name is given by R, ask for job title or anything that can help identify the job.

G18bJ3. What was [your/his] occupation?  What sort of work did [you/he] do?  What were [your/his] most important activities or duties?  (OPENEND)

G18bJ3b. What kind of business or industry was that in?  (OPENEND)

G18bJ4. And, how many weeks did [you/he] work at this in 2006?  (2 DIGITS--1-52)

G18bJ5. On the average, how many hours a week did [you/he] work?  (3 DIGITS--1-112)

G18bJ6. In what month and year did [you/he] start this work?
(TWO VARS--G18BJ6MO WITH TMONTH CODE AND G18AJ6YR-TYEARSPECNOCY CODE)

G18bJ7. In which months during 2006 [were you/was he] working at it?
(MULTIPLE MENTION, G18BJ7x, WITH TMOSTRING CODE)

G18bJ8. [Have you/Has he] stopped this work?

1. YES  5. NO  GO TO G18c

G18bJ9. In what month and year was that?
(TWO VARS--G18BJ9MO WITH TMONTH CODE AND G18BJ9YR WITH ONLY CODES BELOW ALLOWED. NOTE THAT 9998 FOR YEAR IS NOT ALLOWED!)

2006  2007  9996. 2006 OR 2007, DK WHICH

G18bJ10. What happened--did [you/he] close or go out of business, did [you/he] quit, or what?
(OPENEND)
G18c.  (Did you [HEAD] receive any other income in 2006) from roomers or boarders?

A roomer or boarder must be a non-FU member & Head must have work hours for this income.

1.  YES  5.  NO  → GO TO G22

G19c.  How much was it?

(TWO VARIABLES:  A 7-DIGIT FIELD, G19C, AND A TIME UNIT, G19CPER, USING TPERDAY CODE)

G20c.  During which months of 2006 did [you/he] get this income?

(MULTIPLE MENTION G20Cx, CODES ARE TMOSTRING)

G21c.  INTERVIEWER CHECKPOINT --WHETHER WORK HOURS FOR THIS INCOME WERE REPORTED

Reported incomes:
Roomers or boarders

Were ALL jobs for the above incomes reported (see Employers list below)?

PROBE:  Did you tell me earlier about the job or jobs that go with [this/these] income[s]?
The jobs we talked about were:

READ Employers Head worked for in 2006:
[List of EHC1 employers]

1.  YES, R REPORTED ALL JOBS THAT PRODUCED THIS INCOME  5.  NO, R DID NOT REPORT ALL JOBS THAT PRODUCED THIS INCOME

GO TO G22

G18cJ1.  Then I would like to ask you some questions now about the work [you/he] did for this income.
Did [you/he] work for the federal, state or local government, a private company, or what?

1.  FEDERAL GOV’T  2.  STATE GOV’T  3.  LOCAL GOV’T  4.  PRIVATE NON-GOV’T  5.  SELF-EMPLOYED  7.  OTHER (SPECIFY)

G18cJ2.  What was the name of that employer?  (25 CHARACTERS)

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

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

IWER:  If no employer name is given by R, ask for job title or anything that can help identify the job.

G18cJ3.  What was [your/his] occupation?  What sort of work did [you/he] do?  What were [your/his] most important activities or duties?  (OPENEND)

G18cJ3b.  What kind of business or industry was that in?  (OPENEND)

G18cJ4.  And, how many weeks did [you/he] work at this in 2006?  (2 DIGITS--1-52)

G18cJ5.  On the average, how many hours a week did [you/he] work?  (3 DIGITS--1-112)

G18cJ6.  In what month and year did [you/he] start this work?
(TWO VARS--G18CJ6MO WITH TMONTH CODE AND G18CJ6YR-TYEARSPECNO CY CODE)

G18cJ7.  In which months during 2006 [were you/was he] working at it?
(MULTIPLE MENTION, G18CJ7x, WITH TMOSTRING CODE)

G18cJ8.  (Have you/Has he) stopped this work?

1.  YES  5.  NO  → GO TO G22

G18cJ9.  In what month and year was that?
(TWO VARS--G18CJ9MO WITH TMONTH CODE AND G18CJ9YR WITH
ONLY CODES BELOW ALLOWED.  NOTE THAT 9998 FOR YEAR IS NOT ALLOWED!)

2006  2007  9996, 2006 OR 2007, DK WHICH

G18bJ10.  What happened--did [you/he] close or go out of business, did [you/he] quit, or what?
(OPENEND)
G22. CAI CHECKPOINT (VARNAME=G22CKPT)

SEE BC18--NUMBER OF JOBS IN 2006

MORE THAN ONE JOB IN 2006 → ALL OTHERS → GO TO G25a

G23. Did you include your [HEAD] earnings from all of [your/his] job(s) in the amounts we just talked about?

1. YES → GO TO G25a

5. NO

G24. How much did you [HEAD] earn from (that job/those other jobs) in 2006?

$ (7 DIGITS) FROM OTHER JOBS IN 2006

G25a. Did you [HEAD] receive any (other) income in 2006 from rent?

1. YES

5. NO → GO TO G25b

G26a. How much was it?

(TWO VARIABLES: A 6-DIGIT FIELD, G26A, AND A TIME UNIT, G26APER, USING TPERWK CODE)

G26a1. INTERVIEWER CHECKPOINT

WIFE/WIFE'S IN FU → ALL OTHERS → GO TO G27a

G26a2. Does that include (your/WIFE'S/WIFE'S) share?

1. YES

5. NO

G27a. During which months of 2006 did you [HEAD] get this income?

(MULTIPLE MENTION G27Ax, WITH TMOSTRING CODE)

G25b. (Did you [HEAD] receive any other income in 2006) from dividends?

1. YES

5. NO → GO TO G25c

G26b. How much was it?

(TWO VARIABLES: A 6-DIGIT FIELD, G26B, AND A TIME UNIT, G26BPER, USING TPERMO CODE)

G26b1. INTERVIEWER CHECKPOINT

WIFE/WIFE'S IN FU → ALL OTHERS → GO TO G27b

G26b2. Does that include [your/WIFE'S/WIFE'S] dividends?

1. YES

5. NO

G27b. During which months of 2006 did you [HEAD] get this income?

(MULTIPLE MENTION G27Bx, WITH TMOSTRING CODE)
G25c. (Did you [HEAD] receive any other income in 2006) from interest?
1. YES  5. NO  GO TO G25d

G26c. How much was it?
(TWO VARIABLES: A 6-DIGIT FIELD, G26C, AND A TIME UNIT, G26CPER, USING TPERMO CODE)

G26c1. INTERVIEWER CHECKPOINT

G26c2. Does that include [your/WIFE’S/"WIFE’S"] interest?
1. YES  5. NO

G27c. During which months of 2006 did you [HEAD] get this income?
(MULTIPLE MENTION G27Cx, WITH TMOSTRING CODE)

G25d. (Did you [HEAD] receive any other income in 2006) from trust funds and royalties?
1. YES  5. NO  GO TO G25e

G26d. How much was it?
(TWO VARIABLES: A 6-DIGIT FIELD, G26D, AND A TIME UNIT, G26DPER, USING TPERMO CODE)

G27d. During which months of 2006 did you [HEAD] get this income?
(MULTIPLE MENTION G27Dx, WITH TMOSTRING CODE)

G25e. (Did you [HEAD] receive any income in 2006) from TANF (or [NAME OF STATE AID PROGRAM IF TANF NOT THE ONE]), formerly called ADC or AFDC?
1. YES  5. NO  GO TO G25f

G26e. How much was it?
(TWO VARIABLES: A 6-DIGIT FIELD, G26E, AND A TIME UNIT, G26EPER, USING TPER2WK CODE)

G27e. During which months of 2006 did you [HEAD] get this income?
(MULTIPLE MENTION G27Ex, WITH TMOSTRING CODE)

G27ee. Who in the family was covered by this?
(2-DIGIT MULTIMENTION: CYAQSdn OF EACH PERSON IN FU LAST YEAR; DISPLAY NAME, RTH, FUHU)
ENTER all that apply

G25f. (Did you [HEAD] receive any income in 2006) from Supplemental Security Income?
1. YES  5. NO  GO TO G25g

G25ff. Did you [HEAD] receive it for (yourself/himself), or for someone else?
1. SELF  2. SOMEONE ELSE  3. BOTH
GO TO G26f

G25fff. Let's talk about the other person's Supplemental Security when we talk about their income.
G25f. INTERVIEWER CHECKPOINT

1. G25ff IS SOMEONE ELSE
2. G25ff IS BOTH

GO TO G25g

G26f. How much was [it/the Supplemental Security Income] [you/he] received for [yourself/himself]? (TWO VARIABLES: A 6-DIGIT FIELD, G26f, AND A TIME UNIT, G26fPER, USING TPERMO CODE)

G27f. During which months of 2006 did you [HEAD] get this income? (MULTIPLE MENTION G27fx, WITH TMOSTRING CODE)

G25g. (Did you [HEAD] receive any income in 2006) from other welfare?

1. YES
5. NO

GO TO G31

G26g. How much was it? (TWO VARIABLES: A 6-DIGIT FIELD, G26G, AND A TIME UNIT, G26GPER, USING TPERWK CODE)

G27g. During which months of 2006 did you [HEAD] get this income? (MULTIPLE MENTION G27Gx, WITH TMOSTRING CODE)

SOCSEC BLOCK:

G31. Did you [HEAD] [or anyone else in the family there] receive any income in 2006 from Social Security, such as disability, retirement or survivor's benefits?

All Social Security received by any FU member must be reported here.

1. YES
5. NO

GO TO G37

G32. Who was that? (LIST AQSN'S OF ALL SUCH PEOPLE--QUALIFIED PERSONS ARE CURRENT HEAD (CYFUHU=1,4 AND CYAQRTH=101,102), CURRENT WIFE"/"WIFE" (CYFUHU=1,4 AND CYAQRTH=202,222), AND ANY OFM WHO WAS IN FU LAST YEAR (CCS=1,3 AND (CYFUHU=1 AND CYAQRTH GT 222 OR CYFUHU=6-12 AND CYYMIO=2006-2007 OR CYFUHU=4 AND CYYMIO LE 2006 AND CYAQRTH GT 222) OR CCS=2 AND CYFUHU=4 AND CYAQRTH GT 222; DISPLAY NAME, RTH, FUHU)

ENTER all that apply

G33. First let me ask about [PERSON FROM G32's] Social Security. Was that disability, retirement, survivor's benefits, or what?

1. DISABILITY
2. RETIREMENT
3. SURVIVOR'S BENEFITS
5. DEPENDENT OF DISABLED RECIPIENT

6. DEPENDENT OF RETIRED RECIPIENT
7. OTHER (SPECIFY)

G34. How much was it? (TWO VARIABLES: A 6-DIGIT FIELD, G34, AND A TIME UNIT, G34PER, USING TPERMO CODE)

G35. During which months of 2006 did you [PERSON FROM G32] get this income? (MULTIPLE MENTION G35x, WITH TMOSTRING CODE)

G36. INTERVIEWER CHECKPOINT

Did anyone else receive any income from Social Security in 2006?

1. YES
5. NO

GO TO G37

ASK G33-G36 AGAIN FOR EACH ADDITIONAL PERSON

END SOCSEC BLOCK
G37. Did you [HEAD] receive any income in 2006 from the Veteran's Administration for a servicemen's, [widow's,] or survivor's pension, service disability, or the GI bill?

1. YES, SERVICEMEN'S, (WIDOW'S) OR SURVIVOR'S PENSION
2. YES, SERVICE DISABILITY
3. YES, GI BILL
4. YES, OTHER (SPECIFY)
5. NO

GO TO G40

G38. How much was it?
(TWO VARIABLES: A 6-DIGIT FIELD, G38, AND A TIME UNIT, G38PER, USING TPERMO CODE)

G39. During which months of 2006 did you [HEAD] get this income?
(MULTIPLE MENTION G39x, WITH TMOSTRING CODE)

G40A-C BLOCK:

G40. Did you [HEAD] receive any income in 2006 from other retirement pay, pensions, or annuities?

ENTER all that apply and ask G41 and G42 for each box checked

5. NO

GO TO G44a

1. YES, RETIREMENT PAY, PENSIONS
2. YES, ANNUITIES, IRAS
3. YES, OTHER (SPECIFY)

GO TO G44a

G41a. How much was from retirement pay, pensions?
(TWO VARIABLES: A 6-DIGIT FIELD, G41A, AND A TIME UNIT, G41APER, USING TPERMO CODE)

G42a. During which months of 2006 did you [HEAD] get this income?
(MULTIPLE MENTION G42Ax, WITH TMOSTRING CODE)

G41b. How much was from annuities?
(TWO VARIABLES: A 6-DIGIT FIELD, G41B, AND A TIME UNIT, G41BPER, USING TPERMO CODE)

G42b. During which months of 2006 did you [HEAD] get this income?
(MULTIPLE MENTION G42Bx, WITH TMOSTRING CODE)

G41c. How much was the other income?
(TWO VARIABLES: A 6-DIGIT FIELD, G41C, AND A TIME UNIT, G41CPER, USING TPERMO CODE)

G41c1. What was that from? (OPENEND)

G42c. During which months of 2006 did you [HEAD] get this income?
(MULTIPLE MENTION G42Cx, WITH TMOSTRING CODE)

END G41A-C BLOCK

G43. [Not including Veteran's Administration pensions,] How many different pensions or annuities did you [HEAD] receive income from in 2006? (1-DIGIT, VALUES OF 1-6=ACTUAL NUMBER, 7=7 OR MORE)

G44a. Did you [HEAD] receive any income in 2006 from unemployment compensation?

1. YES
5. NO

GO TO G44b

G45a. How much was it?
(TWO VARIABLES: A 6-DIGIT FIELD, G45A, AND A TIME UNIT, G45APER, USING TPERWK CODE)

G46a. During which months of 2006 did [you/he] get this income?
(MULTIPLE MENTION G46Ax, WITH TMOSTRING CODE)
G44b. (Did you [HEAD] receive any income in 2006) from workers compensation?

1. YES  5. NO  ➔  GO TO G44c

G45b. How much was it?
(TWO VARIABLES: A 6-DIGIT FIELD, G45B, AND A TIME UNIT, G45BPER, USING TPERMO CODE)

G46b. During which months of 2006 did [you/he] get this income?
(MULTIPLE MENTION G46Bx, WITH TMOSTRING CODE)

G44c. (Did you [HEAD] receive any income in 2006) from child support?

1. YES  5. NO  ➔  GO TO G44d

G45c. How much was it?
(TWO VARIABLES: A 6-DIGIT FIELD, G45C, AND A TIME UNIT, G45CPER, USING TPERWK CODE)

G46c. During which months of 2006 did [you/he] get this income?
(MULTIPLE MENTION G46Cx, WITH TMOSTRING CODE)

G44d. (Did you [HEAD] receive any income in 2006) from alimony or separate maintenance?

1. YES  5. NO  ➔  GO TO G44e

G45d. How much was it?
(TWO VARIABLES: A 6-DIGIT FIELD, G45D, AND A TIME UNIT, G45DPER, USING TPERWK CODE)

G46d. During which months of 2006 did [you/he] get this income?
(MULTIPLE MENTION G46Dx, WITH TMOSTRING CODE)

G44e. Did you [HEAD] receive any help in 2006 from relatives?
This must be from non-FU members.

1. YES  5. NO  ➔  GO TO G44f

G45e. How much was it?
(TWO VARIABLES: A 6-DIGIT FIELD, G45E, AND A TIME UNIT, G45EPER, USING TPERWK CODE)

G46e. During which months of 2006 did [you/he] get this income?
(MULTIPLE MENTION G46Ex, WITH TMOSTRING CODE)

G44f. Did anyone (else) not living with you [HEAD] help you [HEAD] [and [your/his] family] out by giving [you/him] money during 2006?

1. YES  5. NO  ➔  GO TO G44g

G45f. How much was it?
(TWO VARIABLES: G45F=6 DIGITS AND G45FPER USES TPERWK CODE)

G46f. During which months of 2006 did [you/he] get this income?
(MULTIPLE MENTION G46Fx, WITH TMOSTRING CODE)
G44g. Did you [HEAD] receive any other income in 2006 from anything else?

1. YES  
5. NO  
GO TO G49

G45g1. What was that from? (OPENEND)

G45g. How much was it?
(TWO VARIABLES: G45G=6 DIGITS AND G45GPER USES TPERWK CODE)

G46g. During which months of 2006 did [you/he] get this income?
(MULTIPLE MENTION G46Gx, WITH TMOSTRING CODE)

G49. INTERVIEWER CHECKPOINT

SEE FU LISTING--IF SOMEONE LISTED HAS CYFUHU=1, 4 AND CYAQRTH=202, 222

1. WIFE/"WIFE" IN FU NOW  
5. ALL OTHERS  
GO TO G64

G50. Did [you/WIFE/"WIFE"] receive any income during 2006?

1. YES  
5. NO  
GO TO G51ab

G51a. Was any of it earnings from [your/her] work [besides the unincorporated business we talked about a few minutes ago]?

1. YES  
5. NO  
GO TO G52

G51ab. INTERVIEWER CHECKPOINT

SEE DEWTR2006 AND G9C--WHETHER WORKED IN 2006, EXCLUDING UNINCORPORATED BUSINESS

JOB REPORTED IN EHC FOR WIFE/"WIFE" IN 2006

NO JOB REPORTED IN EHC & G9C/G10 = W/"W" DID NOT WORK FOR UNINCORPORATED BIZ, BUT G9A/G10 = W/"W" WORKED FOR INCORPORATED BIZ IN 2006

ALL OTHERS

GO TO G52c

G51b. Did [you/she] receive any earnings from [your/her] work at [NAME[S] OF EMPLOYER[S] FROM DE18b]?

1. YES  
5. NO  
GO TO G52

G51c. How was that? (OPENEND)

G52. How much did [you/she] earn altogether from work in 2006, that is, before anything was deducted for taxes or other things?  
$ (7 DIGITS)

G52a. During which months of 2006 did [you/she] get this income?  
(MULTIMENTION G52Ax, WITH TMOSTRING CODE)
G52b. INTERVIEWER CHECKPOINT: SEE G52--WERE WORK HOURS REPORTED FOR THIS INCOME IN SECTION DE?

Reported incomes:
Wages/salaries

Were ALL jobs for the above incomes reported (see Employers list below)?

PROBE: Did you tell me earlier about the job or jobs that go with [this/these] income[s]?
The jobs we talked about were:

READ Employers Wife/"Wife" worked for in 2006:
[LIST OF EHC2 EMPLOYERS]

1. YES. R REPORTED ALL JOBS THAT PRODUCED THIS INCOME

GO TO G52c

5. NO. R DID NOT REPORT ALL JOBS THAT PRODUCED THIS INCOME

G52J1. Then I would like to ask you some questions now about the work [you/she] did for this income. Did [you/she] work for the federal, state or local government, a private company, or what?

1. FEDERAL GOV'T
2. STATE GOV'T
3. LOCAL GOV'T
4. PRIVATE NON-GOV'T
5. SELF-EMPLOYED
7. OTHER (SPECIFY)

G52J2. What was the name of that employer? (25 CHARACTERS)

IF NECESSARY: This information will help us to process employment history information you gave us. The name itself will never be released as part of the data from the study.
IWER: If no employer name is given by R, ask for job title or anything that can help identify the job.

G52J3. What was [your/her] occupation? What sort of work did [you/she] do? What were [your/her] most important activities or duties? (OPENEND)

G52J3b. What kind of business or industry was that in? (OPENEND)

G52J4. And, how many weeks did [you/she] work at this in 2006? (2 DIGITS--1-52)

G52J5. On the average, how many hours a week did [you/she] work? (3 DIGITS--1-112)

G52J6. In what month and year did [you/she] start this work?
(TWO VARS--G52J6MO WITH TMONTH CODE AND G52J6YR-TYEARSPECNOCY CODE)

G52J7. In which months during 2006 [were you/was she] working at it?
(MULTIPLE MENTION, G52J7x, WITH TMOSTRING CODE)

G52J8. [Have you/Has she] stopped this work?

1. YES
5. NO

GO TO G52c

G52J9. In what month and year was that?
(TWO VARS--G52J9MO WITH TMONTH CODE AND G52J9YR WITH ONLY CODES BELOW ALLOWED. NOTE THAT 9998 FOR YEAR IS NOT ALLOWED!)

2006 2007 9996. 2006 OR 2007, DK WHICH

G52J10. What happened--did [your/her] employer close or go out of business, did [you/she] quit, or what?
(OPENEND)
G52c. INTERVIEWER CHECKPOINT

WHETHER WIFE/"WIFE" HAD INCOME LAST YEAR

"YES" TO G50 OR G51b

ALL OTHERS → GO TO G64

G53. Did [you/she] receive any unemployment compensation in 2006?

1. YES 5. NO → GO TO G56

G54. How much was that?

(TWO VARIABLES: A 6-DIGIT FIELD, G54, AND A TIME UNIT, G54PER, USING TPERWK CODE)

G55. During which months of 2006 did [you/she] get this income?

(MULTIPLE MENTION G55x, WITH TMOSTRING CODE)

G56. Did [you/she] receive any workers compensation in 2006?

1. YES 5. NO → GO TO G59

G57. How much was that?

(TWO VARIABLES: A 6-DIGIT FIELD, G57, AND A TIME UNIT, G57PER, USING TPERMO CODE)

G58. During which months of 2006 did [you/she] get this income?

(MULTIPLE MENTION G58x, WITH TMOSTRING CODE)

G59A-D BLOCK:

G59. Did [you/she] receive any [other] income in 2006 from rent, dividends or interest [besides the amounts you reported earlier], trust funds or royalties?

ENTER all that apply and ask G59 questions for each box checked

5. NO → GO TO G60

1. YES, RENT

G59a. How much was the rent?

(TWO VARIABLES: A 6-DIGIT FIELD, G59A, AND A TIME UNIT, G59APER, USING TPERMO)

G59aa. INTERVIEWER CHECKPOINT

SEE G25a--WHETHER HEAD REPORTED RENT INCOME

1. YES, HEAD HAD RENT 5. NO, NO RENT DK/RF → GO TO G59a4

G59a3. Is that in addition to the amount you reported for [HEAD/yourself]?

1. YES 5. NO

G59a4. During which months of 2006 did [you/she] get this income?

(MULTIPLE MENTION G59Ax, TMOSTRING CODE)
G59b. How much were the dividends?
(TWO VARIABLES: A 6-DIGIT FIELD, G59B, AND A TIME UNIT, G59BPER, USING TPERMO CODE)

G59bb. INTERVIEWER CHECKPOINT (VARNAME=G59BBVKPT)

SEE G25b--WHETHER HEAD REPORTED DIVIDENDS
1. YES, HEAD HAD DIVIDENDS  5. NO, NO DIVIDENDS  DK/RF

GO TO G59b4

G59b3. Is that in addition to the amount you reported for [HEAD/yourself]?

1. YES  5. NO

G59b4. During which months of 2006 did [you/she] get this income?
(MULTIPLE MENTION G59Bx, TMOSTRING CODE)

G59c. How much was the interest?
(TWO VARIABLES: A 6-DIGIT FIELD, G59C, AND A TIME UNIT, G59CPER, USING TPERMO CODE)

G59cc. INTERVIEWER CHECKPOINT (VARNAME=G59CCCKPT)

SEE G25c--WHETHER HEAD REPORTED INTEREST
1. YES, HEAD HAD INTEREST  5. NO, NO INTEREST  DK/RF

GO TO G59c4

G59c3. Is that in addition to the amount you reported for [HEAD/yourself]?

1. YES  5. NO

G59c4. During which months of 2006 did [you/she] get this income?
(MULTIPLE MENTION G59Cx, TMOSTRING CODE)

G59d. How much did [you/she] receive from trust funds or royalties?
(TWO VARIABLES: G59D=6 DIGITS AND G59DPER USES TPERMO CODE)

G59d4. During which months of 2006 did [you/she] get this income?
(MULTIPLE MENTION G59Dx, TMOSTRING CODE)

END G59A-D BLOCK
G60A-D BLOCK:

G60. Did [you/she] receive any [other] income in 2006 from Supplemental Security Income, TANF [or [NAME OF STATE AID PROGRAM IF NOT TANF]], formerly called ADC/AFDC, child support or other welfare?

ENTER all that apply and ask G60 questions for each box checked

1. YES, SSI
   - G60a1. Did [you/she] receive the SSI for [yourself/herself], or for someone else?
     1. SELF
     2. SOMEONE ELSE
     3. BOTH
     GO TO G60a4
     - G60a2. Let's talk about the other person's Supplemental Security when we talk about their income.
   - G60a3. INTERVIEWER CHECKPOINT (VARNAME=G60A3CKPT)
     1. G60a1 IS "SOMEONE ELSE"
     2. G60a1 IS "BOTH"
     GO TO NEXT CHECKED G60 ITEM, OR G61 IF NONE MARKED
     (TWO VARIABLES: A 6-DIGIT FIELD, G60A, AND A TIME UNIT, G60APER, USING TPERMO CODE)
   - G60a5. During which months of 2006 did [you/she] get this income?
     (MULTIPLE MENTION G60Ax, WITH TMOSTRING CODE)

2. YES, TANF/FIP
   - G60b. How much did [you/she] receive from [NAME OF STATE AID PROGRAM] in 2006?
     (TWO VARIABLES: A 6-DIGIT FIELD, G60B, AND A TIME UNIT, G60BPER, USING TPER2WK CODE)
   - G60bb. During which months of 2006 did [you/she] get this income?
     (MULTIPLE MENTION G60Bx, WITH TMOSTRING CODE)
   - G60bbb. Who in the family was covered by this?
     (2-DIGIT MULTIMENTION: CYAQSNO OF EACH SUCH PERSON; DISPLAY NAME, RTH, FUHU)
     ENTER all that apply

3. YES, CHILD SUPPORT
   - G60c. How much did [you/she] receive from child support in 2006?
     (TWO VARIABLES: A 6-DIGIT FIELD, G60C, AND A TIME UNIT, G60CPER, USING TPERWK CODE)
   - G60cc. During which months of 2006 did [you/she] get this income?
     (MULTIPLE MENTION G60Cx, WITH TMOSTRING CODE)

4. YES, OTHER WELFARE
   - G60d. How much did [you/she] receive from other welfare in 2006?
     (TWO VARIABLES: A 6-DIGIT FIELD, G60D, AND A TIME UNIT, G60DPER, USING TPERWK CODE)
   - G60dd. During which months of 2006 did [you/she] get this income?
     (MULTIPLE MENTION G60Dx, WITH TMOSTRING CODE)

END G60A-D BLOCK
G61. Did [you/she] receive any [other] income in 2006 from pensions or annuities?

1. YES  5. NO  

GO TO G62

G61a. How much was from pensions or annuities?

(TWO VARIABLES: A 6-DIGIT FIELD, G61, AND A TIME UNIT, G61PER, USING TPERMO CODE)

G61b. During which months of 2006 did [you/she] get this income?

(MULTIPLE MENTION G61x, WITH TMOSTRING CODE)

G62A-B BLOCK:

G62. Did [you/she] receive any help in 2006 from relatives or friends?

This must be from a non-FU member

ENTER all that apply and ask G62 questions for each box checked

5. NO  

GO TO G63

1. YES, RELATIVES  

G62a. How much was from relatives?

(TWO VARIABLES: A 6-DIGIT FIELD, G62A, AND A TIME UNIT, G62APER, USING TPERWK CODE)

G62aa. During which months of 2006 did [you/she] get this income?

(MULTIPLE MENTION G62Ax, WITH TMOSTRING CODE)

2. YES, FRIENDS  

G62b. How much was from friends?

(TWO VARIABLES: A 6-DIGIT FIELD, G62B, AND A TIME UNIT, G62BPER, USING TPERWK CODE)

G62bb. During which months of 2006 did [you/she] get this income?

(MULTIPLE MENTION G62Bx, WITH TMOSTRING CODE)

END G62A-B BLOCK

G63. Any other income?

1. YES  5. NO  

GO TO G64

G63a. What was it from?

(OPENEND)

G63b. How much did that amount to in 2006?

$ (5 DIGITS)

G63c. During which months of 2006 did [you/she] get this income?

(MULTIPLE MENTION G63Cx, WITH TMOSTRING CODE)
G64. INTERVIEWER CHECKPOINT--DESPITE THE PAGE, HERE'S THE LOGIC IN A NUTSHELL:

\[
\text{CYAGE GE 16 AND (CCS=1, 3 AND (CYFUHU=1 AND CYAQRTH GT 222) OR (CYFUHU=6-12 AND CYYMIO=2006-2007) OR (CYFUHU=4 AND CYYMIO LE 2006 AND CYAQRTH GT 222)) OR (CCS=2 AND CYFUHU=4 AND CYAQRTH GT 222)}
\]

SEE FU LISTING. IN GRID G71 BELOW, LIST ALL PERSONS WHO MEET ANY OF THE FOLLOWING CONDITIONS:

<table>
<thead>
<tr>
<th>OTHER FU MEMBER</th>
<th>RELATIONSHIP TO HEAD</th>
<th>FIRST NAME</th>
<th>LAST NAME</th>
<th>CURRENT AGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
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</table>

G72. INTERVIEWER CHECKPOINT

SEE G71 OLDER OFUM GRID ABOVE

IS SOMEONE LISTED?

[YES] → GO TO G73

[NO] → GO TO G90b

G73. AQSN OF ELIGIBLE PERSON
G74. INTERVIEWER CHECKPOINT (VARNAME=G74CKPT)

A. THIS PERSON IS DECEASED (CYFUHU=7)

B. THIS PERSON IS NOT DECEASED

G75. Next we would like to know a little about [INDIVIDUAL]. Is [he/she] working now, looking for work, retired, a student, keeping house, or what?

ENTER 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)
98. DK
99. NA/REF

G76. [IF PERSON IS DECEASED: Next we would like to know a little about [INDIVIDUAL].]

During 2006, how many full-time or part-time jobs did [he/she] have [not counting work around the house]?

1. ONLY ONE JOB
2. TWO JOBS
3. THREE JOBS
4. FOUR JOBS
5. DIDN'T HAVE A JOB

GO TO G83

G77. What kind of work did [he/she] usually do? What was [his/her] occupation? (OPENEND)

G78. About how much money did [he/she] earn from that job last year?

(TWO VARIABLES: A 10-DIGIT FIELD IN THE FORM XXXXXXXX.YY, LABOR1-LABOR4 [1 FOR 1ST MENTION, 2 FOR 2ND, ETC., AND A TIME UNIT, G78PER1 [G78PER2, ETC.]], USING TPERNODAY CODE)

G79. About how many weeks did [he/she] work on that job last year? [2-DIGIT--1-52]

G80. During which months was that?

(MULTIPLE MENTION G80x, WITH TMOSTRING CODE)

G81. During the weeks that [he/she] worked, about how many hours did [he/she] usually work per week? [3 DIGITS--1-112]

G82. INTERVIEWER CHECKPOINT (VARNAME=G82CKPT)

SEE G76 ABOVE--NUMBER OF JOBS

"ONLY ONE JOB" CHECKED

ALL OTHERS

GO TO G83

ASK G77-G81 ABOUT EACH ADDITIONAL JOB, THEN GO TO G83
G83. Did [he/she] have any [other] income, such as pensions, welfare, interest, gifts, or anything else, last year?

1. YES  
2. INTEREST  
3. TANF/FIP  
4. SSI  
5. NO  

GO TO G87

G84. What was that from?

ENTER all that apply and ask G84 questions for each box checked.

1. INTEREST  
   G84a. How much was from interest?  
   (TWO VARIABLES: A 6-DIGIT FIELD, G84A, AND A TIME UNIT, G84APER, USING TPERMO CODE)

G84aa. During which months of 2006 did [he/she] get this income?  
   (MULTIPLE MENTION G84Ax, WITH TMOSTRING CODE)

2. TANF/FIP  
   G84b. How much was from TANF [or [NAME OF STATE AID PROGRAM IF NOT TANF]], formerly called ADC/AFDC, ADC, AFDC?  
   (TWO VARIABLES: A 6-DIGIT FIELD, G84B, AND A TIME UNIT, G84BPER, USING TPER2WK CODE)

G84bb. During which months of 2006 did [he/she] get this income?  
   (MULTIPLE MENTION G84Bx, WITH TMOSTRING CODE)

G84bbb. Who in the family was covered by this?  
   (2-DIGIT MULTIMENTION: CYAQSgn OF EACH SUCH PERSON; DISPLAY NAME, RTH, FUHU)

ENTER all that apply

3. SSI  
   G84c1. Did [he/she] receive the SSI for [himself/herself], or for someone else?

1. SELF  
2. SOMEONE ELSE  
3. BOTH  

GO TO G84c4

84c2. Let’s talk about the other person’s Supplemental Security when we talk about their income.

G84c3. INTERVIEWER CHECKPOINT (VARNAME=G84C3CKPT)

1. G84c1 IS "SOMEONE ELSE"  
2. G84c1 IS "BOTH"  

GO TO NEXT CHECKED G84 ITEM, OR G87 IF NONE MARKED

G84c4. How much was [it/the Supplemental Security Income [he/she] received for [himself/herself]]?  
   (TWO VARIABLES: A 6-DIGIT FIELD, G84C, AND A TIME UNIT, G84CPER, USING TPERMO CODE)

G84c5. During which months of 2006 did [he/she] get this income?  
   (MULTIPLE MENTION G84Cx, WITH TMOSTRING CODE)

4. WELFARE  
   G84d. How much was from welfare?  
   (TWO VARIABLES: A 6-DIGIT FIELD, G84D, AND A TIME UNIT, G84DPER, USING TPERWK CODE)

G84dd. During which months of 2006 did [he/she] get this income?  
   (MULTIPLE MENTION G84Dx, WITH TMOSTRING CODE)
5. SOCIAL SECURITY

G84e. INTERVIEWER CHECKPOINT (G84ECKPT)

SEE G32--WHETHER SOCIAL SECURITY REPORTED FOR THIS OFUM

5. NO
1. YES
GO TO NEXT CHECKED G84 ITEM, OR G87a IF NONE ASKED

G84e2. What was the Social Security? Was that disability, retirement, survivor's benefits or what?

1. DISABILITY  2. RETIREMENT  3. SURVIVOR'S BENEFITS

G84e3. How much was from Social Security?
(TWO VARIABLES: A 6-DIGIT FIELD, G84E, AND A TIME UNIT, G84EPER, USING TPERMO CODE)

G84e4. During which months of 2006 did [he/she] get this income?
(MULTIPLE MENTION G84Ex, WITH TMOSTRING CODE)

6. VETERAN'S BENEFITS

G84f. How much was from veteran's benefits?
(TWO VARIABLES: A 6-DIGIT FIELD, G84F, AND A TIME UNIT, G84FPER, USING TPERMO CODE)

G84ff. During which months of 2006 did [he/she] get this income?
(MULTIPLE MENTION G84Fx, WITH TMOSTRING CODE)

7. PENSIONS, ANNUITIES

G84g. How much was from pensions or annuities?
(TWO VARIABLES: A 6-DIGIT FIELD, G84G, AND A TIME UNIT, G84GPER, USING TPERMO CODE)

G84gg. During which months of 2006 did [he/she] get this income?
(MULTIPLE MENTION G84Gx, WITH TMOSTRING CODE)

8. UNEMPLOYMENT COMPENSATION

G84h. How much was from unemployment compensation?
(TWO VARIABLES: A 6-DIGIT FIELD, G84H, AND A TIME UNIT, G84HPER, USING TPERWK CODE)

G84hh. During which months of 2006 did [he/she] get this income?
(MULTIPLE MENTION G84Hx, WITH TMOSTRING CODE)

9. WORKER'S COMPENSATION

G84j. How much was from worker's compensation?
(TWO VARIABLES: A 6-DIGIT FIELD, G84J, AND A TIME UNIT, G84JPER, USING TPERMO CODE)

G84jj. During which months of 2006 did [he/she] get this income?
(MULTIPLE MENTION G84Jx, WITH TMOSTRING CODE)

10. CHILD SUPPORT

G84k. How much was from child support?
(TWO VARIABLES: A 6-DIGIT FIELD, G84K, AND A TIME UNIT, G84KPER, USING TPERWK CODE)

G84kk. During which months of 2006 did [he/she] get this income?
(MULTIPLE MENTION G84Kx, WITH TMOSTRING CODE)
11. HELP FROM RELATIVES

G84l. How much was received from relatives?
(TWO VARIABLES: A 6-DIGIT FIELD, G84L, AND A TIME UNIT, G84LP, USING TPERWK CODE)

G84ll. During which months of 2006 did [he/she] get this income?
(MULTIPLE MENTION G84Lx, WITH TMOSTRING CODE)

12. OTHER

G84m. What was that other income from? (OPENEND)

G84mm. How much was from anything else?
(TWO VARIABLES: A 6-DIGIT FIELD, G84M, AND A TIME UNIT, G84MP, USING TPERWK CODE)

G84mm. During which months of 2006 did [he/she] get this income?
(MULTIPLE MENTION G84Mx, WITH TMOSTRING CODE)

G87. INTERVIEWER CHECKPOINT--CYAGE<50 (VARNAME=G87CKPT)

THIS OFUM IS UNDER AGE 50  ALL OTHERS → GO TO G90

G88. When did [he/she] last attend school?
(TWO VARIABLES: G88MO USING TMONTH CODE AND G88YR USING TYEAR/specy)

2006  2007  ALL OTHERS → GO TO G90

G89. Was [he/she] enrolled as a full-time or part-time student?

1. FULL-TIME  2. PART-TIME

G90. What is the highest grade or year of school that [he/she] has completed?

00. NONE  01. FIRST GRADE  02. SECOND GRADE  03. THIRD GRADE  04. FOURTH GRADE  05. FIFTH GRADE
06. SIXTH GRADE  07. SEVENTH GRADE  08. EIGHTH GRADE  09. NINTH GRADE  10. TENTH GRADE  11. ELEVENTH GRADE
12. TWELFTH GRADE "HIGH SCHOOL", GED  13. ONE YEAR COLLEGE  14. TWO YEARS COLLEGE  15. THREE YEARS COLLEGE
16. GRADUATED BACHELOR'S DEGREE  17. AT LEAST ONE YEAR POST-GRADUATE, OR MORE

G90a. INTERVIEWER CHECKPOINT (VARNAME=G90ACKPT)

SEEG71 GRID

ANY ADDITIONAL 2006 OLDER OFUMS LISTED IN THE G71 GRID  ALL OTHERS

ASK G75-G90 FOR EACH PERSON LISTED, THEN GO TO G90b
G90b. INTERVIEWER CHECKPOINT--DESPITE THE PAGE, HERE'S THE LOGIC IN A NUTSHELL:
    CYAGE LT 16 AND (CCS=1, 3 AND (CYFUHU=1 AND CYAQRTH GT 222) OR
    (CYFUHU=6-12 AND CYYMIO=2006-2007) OR
    (CYFUHU=4 AND CYYMIO LE 2006 AND CYAQRTH GT 222))
    OR (CCS=2 AND CYFUFE=4 AND CYAQRTH GT 222)

SEE FU LISTING. IN GRID G90c BELOW, LIST ALL PERSONS AGE 15 OR YOUNGER WHO MEET
ANY OF THE FOLLOWING CONDITIONS:

| OTHER FU MEMBER | RELATIONSHIP TO HEAD | NAME | G90d. Now the younger member(s) of your family, (RELATIONSHIPS TO
<table>
<thead>
<tr>
<th></th>
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<th>HEAD). Did (NAME) have any income in 2006?</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td></td>
<td></td>
<td>1. YES 5. NO</td>
</tr>
<tr>
<td>B</td>
<td></td>
<td></td>
<td>1. YES 5. NO</td>
</tr>
<tr>
<td>C</td>
<td></td>
<td></td>
<td>1. YES 5. NO</td>
</tr>
</tbody>
</table>

G90c. 2006 LITTLE OFUM (OTHER FAMILY UNIT MEMBER) GRID

G90d. Now the younger member(s) of your family, (RELATIONSHIPS TO HEAD). Did (NAME) have any income in 2006?

A. WHOSE FU/HU STATUS IS FU
B. WHO MOVED OUT, BECAME ANY TYPE OF *INST*, OR DIED SINCE JANUARY 2006
C. WHO WERE FU M/I BEFORE JANUARY 2007

G91. INTERVIEWER CHECKPOINT (VARNAME=G91CKPT)

SEE G90c LITTLE OFUM GRID ABOVE

IS SOMEONE LISTED WITH'YES" TO G90d?

YES  NO  GO TO G99

G92. Now, we would like to ask about [NAME's] income. What was that from?

ENTER all that apply and ask G94 (and G95-G97) for each box checked

G94a. How much was from work?
    (TWO VARIABLES: A 6-DIGIT FIELD, G94A, AND A TIME UNIT, G94APER, USING
    TPERNODAY CODE)

G94aa. During which months of 2006 did [he/she] get this income?
    (MULTIPLE MENTION G94Ax, WITH TMOSTRING CODE)

G95. What was [his/her] occupation? What kind of work did [he/she] do? (OPENEND)

G96 About how many weeks did [he/she] work on that job last year? (2-DIGIT--1-52)

G97. During the weeks that [he/she] worked, about how many hours did [he/she] usually work per week? (3 DIGIT--1-112)
G94b. How much was from interest?
(TWO VARIABLES: A 6-DIGIT FIELD, G94B, AND A TIME UNIT, G94BPER, USING TPERMO CODE)

G94bb. During which months of 2006 did [he/she] get this income?
(MULTIPLE MENTION G94Bx, WITH TMOSTRING CODE)

G94c. How much was from SSI?
(TWO VARIABLES: A 6-DIGIT FIELD, G94C, AND A TIME UNIT, G94CPER, USING TPERMO CODE)

G94cc. During which months of 2006 did [he/she] get this income?
(MULTIPLE MENTION G94Cx, WITH TMOSTRING CODE)

G94d. How much was from welfare?
(TWO VARIABLES: A 6-DIGIT FIELD, G94D, AND A TIME UNIT, G94DPER, USING TPERWK CODE)

G94dd. During which months of 2006 did [he/she] get this income?
(MULTIPLE MENTION G94Dx, WITH TMOSTRING CODE)

G94e. INTERVIEWER CHECKPOINT (VARNAME=G94ECKPT)
SEE G32--WHETHER SOCIAL SECURITY REPORTED FOR THIS OFUM

G94e2. What was the Social Security? Was that survivor's benefits, dependent assistance, or what?

G94e3. How much was it?
(TWO VARIABLES: A 6-DIGIT FIELD, G94E, AND A TIME UNIT, G94EPER, USING TPERMO CODE)

G94e4. During which months of 2006 did [he/she] get this income?
(MULTIPLE MENTION G94Ex, WITH TMOSTRING CODE)

G94f. What was that other income from? (OPENEND)

G94f2. How much was it?
(TWO VARIABLES: A 6-DIGIT FIELD, G94F, AND A TIME UNIT, G94FPER, USING TPERWK CODE)

G94f3. During which months of 2006 did [he/she] get this income?
(MULTIPLE MENTION G94Fx, WITH TMOSTRING CODE)

G98. INTERVIEWER CHECKPOINT (VARNAME=G98CKPT)
SEE G90c--2006 OFUMS AGE 15 OR YOUNGER
ANOTHER PERSON LISTED WITH "YES" AT G90d
ALL OTHERS
ASK G92-G94f3 FOR EACH PERSON LISTED, THEN GO TO G99
G99. Did you [HEAD] [or anyone else in your family living there] get any other money in 2006 --like a big settlement from an insurance company, or an inheritance?

1. YES  5. NO  →  GO TO G102

G100. How much did that amount to? $ (7 DIGITS)

G101. How much of that was an inheritance? $ (7 DIGITS)

G102. Some people have expenses they can itemize and deduct on their income tax. Did you [HEAD] itemize deductions on your 2006 federal income tax, such as property taxes, interest payments, medical expenses, and charitable contributions?

1. YES  5. NO  5. DID NOT/WILL NOT FILE  →  GO TO G103

G102a. How much was your itemized deduction for charitable contributions? $ (6 DIGITS)

G102b. How much was your itemized deduction for medical expenses? $ (6 DIGITS)

IF NECESSARY: Is that the amount of the deduction or is that the total medical expense? What was the amount of the deduction?

G103. In 2006, did you [HEAD] [or anyone else in [your/his] family living there] give any money toward the support of anyone who was not living there at the time, including child support, alimony, money given to parents, and things like that? Don't include loans or charitable contributions to organizations; we'll ask about them later.

1. YES  5. NO  →  GO TO SECTION W

G104. How many people was that? (1-DIGIT)

G105. Who was the [first/next] person? (3 VARIABLES: FIRST NAME, LAST NAME AND RTH; RTH=G105CODE)

G106. How much money was that altogether in 2006? $ (7 DIGITS)

G107. Was any of the money you [HEAD] gave in 2006 alimony?

1. YES  5. NO  →  GO TO G109

G108. How much did that child support amount to in 2006? $ (7 DIGITS)

G109. Was any of the money you [HEAD] gave in 2006 alimony?

1. YES  5. NO  →  GO TO G111

G110. How much did that alimony amount to in 2006? $ (7 DIGITS)

G111. INTERVIEWER CHECKPOINT (VARNAME=G111CKPT)

SEE G104 ABOVE--NUMBER OF PERSONS SUPPORTED

2 OR MORE PERSONS  ONLY 1 PERSON

G112. Were any of those people dependent on you [HEAD] for more than half of their total support?

1. YES  5. NO  →  GO TO SECTION W

G113. How many people is that? (1-99)

G114. Was that person dependent on you [HEAD] for more than half of their total support?

1. YES  5. NO  →  GO TO SECTION W
SECTION W: WEALTH

W1 (G115). The next questions I will be asking are designed to give estimates of the wealth of families in the United States and how this has changed in the last two years. In these questions when I refer to the family, I mean your family living there with you.

Do you [or your family living there] have any real estate other than your main home, such as a second home, land, rental real estate, or money owed to you on a land contract?

1. YES  5. NO  \rightarrow\  GO TO W6

W1a (G115a). Does that include a second home?

1. YES  5. NO

W2 (G116). If you sold all that and paid off any debts on it, how much would you realize on it?

$9 DIGITS

GO TO G120

W3 (G117). Would it amount to $50,000 or more?

1. YES  5. NO  8. DON'T KNOW  9. REFUSED

GO TO W6

W4 (G118). $150,000 or more?

1. YES  5. NO  8. DK

GO TO W6

W5 (G119). $5,000 or more?

1. YES  5. NO  8. DK

GO TO W6

W6 (G120). What about the value of what you [or anyone in your family living there] own on wheels? Including personal vehicles you may have already told me about and any cars, trucks, a motor home, a trailer, or a boat--what are they worth all together, minus anything you still owe on them?

[WHEN HU/HUCS PRESENT: DO NOT include vehicles owned by HU or HUCS people]

$9 DIGITS

GO TO W10

W7 (G121). Would they amount to $10,000 or more?

1. YES  5. NO  8. DON'T KNOW  9. REFUSED

GO TO W10

W4 (G118). $25,000 or more?

1. YES  5. NO  8. DK

GO TO W10

W5 (G119). $2,000 or more?

1. YES  5. NO  8. DK

GO TO W10
W10 (G124). Do you [or anyone in your family living there] currently own part or all of a farm or business?

1. YES  5. NO  \rightarrow  GO TO W15

W11 (G125). If you sold all that and paid off any debts on it, how much would you realize on it?

$9 DIGITS  
999999998  DON'T KNOW  
999999999  REFUSED  

\rightarrow  GO TO W15

W12 (G126). Would it amount to $50,000 or more?

1. YES  5. NO  8. DON'T KNOW  9. REFUSED

\rightarrow  GO TO W15

W13 (G127). $200,000 or more?

1. YES  5. NO  8. DK

\rightarrow  GO TO W15

W14 (G128). $10,000 or more?

1. YES  5. NO  8. DK

\rightarrow  GO TO W15

W15 (G129). Do you [or anyone in your family living there] have any shares of stock in publicly held corporations, mutual funds, or investment trusts, not including stocks in employer-based pensions or IRA's? (CHANGE FROM '94--EXCLUDES IRAS)

1. YES  5. NO  \rightarrow  GO TO W21

W16 (G130). If you sold all that and paid off anything you owed on it, how much would you have?

$9 DIGITS  
999999998  DON'T KNOW  
999999999  REFUSED  

\rightarrow  GO TO W20a

W17 (G131). Would it amount to $25,000 or more?

1. YES  5. NO  8. DON'T KNOW  9. REFUSED

\rightarrow  GO TO W21

W18 (G132). $50,000 or more?

1. YES  5. NO  8. DK

\rightarrow  GO TO W21

W19 (G134). $5,000 or more?

1. YES  5. NO  8. DK

\rightarrow  GO TO W21

W20 (G133). $100,000 or more?

1. YES  5. NO  8. DK

\rightarrow  GO TO W21
W20a. CALCULATE W16*.01=DIVDNDS

W20b. CREATE SUMDIVDNDS:

NUMMOS=COUNT THE NUMBER OF REAL MENTIONS TO THE MULTIMENTION MONTHS RECEIVED VARIABLE. IF CODE 13, ALL, WAS INDICATED THEN NUMMOS=12, PERIOD. IF DK/RF LISTED ANYWHERE THEN NUMMOS=99. IF LEAD-IN NE 1 THEN NUMMOS=0.

IF AMT=DK/RF OR PER LT 3 OR PER=DK/RF OR PER=3,4,5 AND NUMMOS=99 THEN GO TO W21 ELSE DO

IF PER=3 THEN SUMDIVDNDS=NUMMOS*4.33*AMOUNT
IF PER=4 THEN SUMDIVDNDS=NUMMOS*2.17*AMOUNT
IF PER=5 THEN SUMDIVDNDS=NUMMOS*AMOUNT
IF PER=6 THEN SUMDIVDNDS=AMOUNT

DO THESE CALCS USING G27B FOR MONTHS, G26B FOR AMOUNT, AND G26BPER FOR PER. OUTPUT VAR IS HDDIVDNDS.

IF G59BB=5 OR G59B3=1 THEN REPEAT USING G59B4 FOR MONTHS, G59B FOR AMOUNT, AND G59BPER FOR PER. OUTPUT VAR IS WFDIVDNDS. IF G59BB=1 OR G59B3=5 OR G59 NE 2 OR G59B NOT ASKED (NO WIFE; WIFE HAS NO INCOME), THEN WFDIVDNDS=0.

SUMDIVDNDS=HDDIVDNDS+WFDIVDNDS.

W20c. INTERVIEWER CHECKPOINT (VARNAME=W20CCKPT)

RATIO OF H&W DIVIDENDS TO EXPECTED DIVIDENDS

| SUMDIVDNDS LT DIVDNDS | ALL OTHERS | GO TO W21 |

W20d. Earlier you reported $[SUMDIVDNDS] for your [and your [wife's/"WIFE's"] dividends last year. Now that we've talked about the value of your stocks, would you say this amount for dividends is about right?

5. NO 1. YES GO TO W21

W20e. How much was it altogether [for both of you]?
(TWO VARIABLES: A 6-DIGIT FIELD, W20E, AND A TIME UNIT, W20EPE, USING TPERMO CODE)

W20f. During which months of 2006 did you get this income?
(MULTIPLE MENTION W20Fx, WITH TMOSTRING CODE)
W21. Do you [or your family living there] have any money in private annuities or Individual Retirement Accounts [IRAs]?

1. YES  5. NO → GO TO W27

W21a. Are they mostly in stocks, mostly in interest earning assets, split between the two, or what?

1. MOSTLY STOCKS  2. MOSTLY INTERST EARNING  3. SPLIT

W22. How much would they be worth?

$ 9 DIGITS  
GO TO W27

999999998  DON'T KNOW
999999999  REFUSED

W23. Would it amount to $25,000 or more?

1. YES  5. NO  8. DON'T KNOW  9. REFUSED → GO TO W27

W24. $50,000 or more?

1. YES  5. NO  8. DK → GO TO W27

W25. $5,000 or more?

1. YES  5. NO  8. DK → GO TO W27

W26. $100,000 or more?

1. YES  5. NO  8. DK → GO TO W27
W27 (G135). Not including employer-based pensions or IRAs already mentioned, do you [or anyone in your family living there] have any money in any of the following: checking or savings accounts, money market funds, certificates of deposit, government savings bonds, or Treasury bills? (CHANGE FROM '94--EXCLUDES IRAS)

1. YES, one or more  
5. NO, none  
GO TO W33

W28 (G136). If you added up all such accounts [for all of your family living there], about how much would they amount to altogether right now?

$9 DIGITS  
GO TO W31a  
99999998  
DON'T KNOW  
99999999  
REFUSED

W29 (G137). Would they amount to $5,000 or more?

1. YES  
5. NO  
8. DON'T KNOW  
9. REFUSED

W30 (G138). $10,000 or more?

1. YES  
5. NO  
8. DK

W31 (G139). $50,000 or more?

1. YES  
5. NO  
8. DK

GO TO W33
W31a. CALCULATE W28*.03=INTEREST

W31b. CREATE SUMINTEREST:

NUMMOS=COUNT THE NUMBER OF REAL MENTIONS TO THE MULTIMENTION MONTHS RECEIVED VARIABLE. IF CODE 13, ALL, WAS INDICATED THEN NUMMOS=12, PERIOD. IF DK/RF LISTED ANYWHERE THEN NUMMOS=99. IF LEAD-IN NE 1 THEN NUMMOS=0.

IF AMT=DK/RF OR PER LT 3 OR PER=DK/RF OR PER=3,4,5 AND NUMMOS=99 THEN GO TO W33 ELSE DO

IF PER=3 THEN SUMINTEREST=NUMMOS*4.33*AMOUNT
IF PER=4 THEN SUMINTEREST=NUMMOS*2.17*AMOUNT
IF PER=5 THEN SUMINTEREST=NUMMOS*AMOUNT
IF PER=6 THEN SUMINTEREST=AMOUNT

DO THESE CALCS USING G27C FOR MONTHS, G26C FOR AMOUNT, AND G26CPER FOR PER. OUTPUT VAR IS HDINTEREST.

IF G59CC=5 OR G59C3=1 THEN REPEAT USING G59C4 FOR MONTHS, G59C FOR AMOUNT, AND G59CPER FOR PER. OUTPUT VAR IS WFINTEREST. IF G59CC=1 OR G59C3=5 OR G59 NE 3 OR G59C NOT ASKED (NO WIFE; WIFE HAS NO INCOME), THEN WFINTEREST=0.

SUMINTEREST=HDINTEREST+WFINTEREST.

W31c. INTERVIEWER CHECKPOINT (VARNAME=W31CCKPT)

RATIO OF H&W INTEREST TO EXPECTED INTEREST

SUMINTEREST LT DIVDNDS → ALL OTHERS → GO TO W33

W31d. Earlier you reported $[SUMINTEREST] for your [and your [wife's/'WIFE's']]] interest last year. Now that we've talked about your accounts, would you say this interest amount is about right?

5. NO → 1. YES → GO TO W33

W31e. How much was it altogether [for both of you]?

(TWO VARIABLES: A 6-DIGIT FIELD, W31E, AND A TIME UNIT, W31EPER, USING TPERMO CODE)

W31f. During which months of 2006 did you get this income?

(MULTIPLE MENTION W31Fx, WITH TMOSTRING CODE)
W33 (G141). Do you [or anyone in your family living there] have any other savings or assets, such as bond funds, cash value in a life insurance policy, a valuable collection for investment purposes, or rights in a trust or estate that you haven't already told us about?

1. YES  5. NO  → GO TO W38

W34 (G142). If you sold that and paid off any debts on it, how much would you have?

$ 9 DIGITS
GO TO W38

99999998
DON'T KNOW

99999999
REFUSED

W35 (G143). Would it amount to $10,000 or more?

1. YES  5. NO  8. DON'T KNOW  9. REFUSED

GO TO W38

W36 (G144). $25,000 or more?  W37 (G145). $2,000 or more?

1. YES  5. NO  8. DK

1. YES  5. NO  8. DK

GO TO W38
W38 (G146). Aside from the debts that we have already talked about, like any mortgage on your main home or vehicle loans -- do you [or anyone in your family living there] currently have any other debts such as credit card charges, student loans, medical or legal bills, or loans from relatives?

1. YES 5. NO → GO TO W43

W39 (G147). If you added up all of these debts [for all of your family living there], about how much would they amount to right now?

$ 9 DIGITS

GO TO W43

W40 (G148). Would they amount to $2,000 or more?

1. YES 5. NO 8. DON'T KNOW 9. REFUSED

GO TO W43

W41 (G149). $5,000 or more?

1. YES 5. NO 8. DK

GO TO W43

W42 (G150). $1,000 or more?

1. YES 5. NO 8. DK

GO TO W43

W43 (G153). These next questions are about changes in your wealth during the last two years. In these questions, when I refer to you I mean you and any family members living with you during that time. Since January 2005, did you [or your family living with you] put aside money in any private annuities or IRAs?

1. YES 5. NO → GO TO W48

W44 (G154). How much did that amount to?

$ 9 DIGITS

GO TO W48

W45 (G155). Was it $10,000 or more?

1. YES 5. NO 8. DON'T KNOW 9. REFUSED

GO TO W48

W46 (G156). $50,000 or more?

1. YES 5. NO 8. DK

GO TO W48

W47 (G157). $5,000 or more?

1. YES 5. NO 8. DK

GO TO W48
Since January 2005, did you [or anyone in your family living there] **cash in any part of a pension, private annuity or IRA?**

1. YES  
5. NO  
GO TO W54

**W49 (G159).** How much did that amount to?

$9 DIGITS
GO TO W54

999999998 DON'T KNOW
999999999 REFUSED

**W50 (G160).** Was it $10,000 or more?

1. YES  
5. NO  
8. DON'T KNOW  
9. REFUSED

**GO TO W54**

**W30 (G138).** $50,000 or more?

1. YES  
5. NO  
8. DK

**GO TO W54**

**W31 (G139).** $100,000 or more?

1. YES  
5. NO  
8. DK

**GO TO W54**

Since January 2005, did you [or anyone in your family living there] **sell any home you were using as your main dwelling?**

1. YES  
5. NO  
GO TO W59

**W55 (G163b).** About how much was the selling price, not including selling commissions and costs?

**IF R sold more than one main home, ask about the one owned in January, 2005**

$9 DIGITS
GO TO W59

999999998 DON'T KNOW
999999999 REFUSED

**W56 (G163c).** Was it $60,000 or more?

1. YES  
5. NO  
8. DON'T KNOW  
9. REFUSED

**GO TO W59**

**W57 (G163d).** $120,000 or more?

1. YES  
5. NO  
8. DK

**GO TO W59**

**W58 (G163e).** $30,000 or more?

1. YES  
5. NO  
8. DK

**GO TO W59**
W59 (G164). Since January 2005, did you [or anyone in your family living there] **buy any real estate other than your main home**, such as a vacation home, land (not including farmland), or rental property?

1. **YES**

5. **NO**

GO TO W6

W60 (G165). Altogether, how much money did you [or anyone in your family living there] put into that?

9. **DIGITS**

GO TO W64

W61 (G166). Was it $60,000 or more?

1. **YES**

5. **NO**

8. **DON'T KNOW**

9. **REFUSED**

GO TO W64

W62 (G167). $120,000 or more?

1. **YES**

5. **NO**

8. **DK**

W63 (G168). $30,000 or more?

1. **YES**

5. **NO**

8. **DK**

GO TO W64

W64 (G169). Since January 2005, did you [or anyone in your family living there] **sell any real estate other than your main home**, such as a vacation home, land (not including farmland), or rental property?

1. **YES**

5. **NO**

GO TO W69

W65 (G170). Altogether, how much money did you [or anyone in your family living there] get from that?

9. **DIGITS**

GO TO W69

W66 (G171). Was it $60,000 or more?

1. **YES**

5. **NO**

8. **DON'T KNOW**

9. **REFUSED**

GO TO W69

W67 (G172). $120,000 or more?

1. **YES**

5. **NO**

8. **DK**

W68 (G173). $30,000 or more?

1. **YES**

5. **NO**

8. **DK**

GO TO W69
Since January 2005, did you [or your family living there] **make additions or improvements totaling $10,000 or more** to any homes or other real estate [you/any of you] owned? Do not count general maintenance or upkeep.

1. YES  
5. NO  
GO TO W73

What was the total dollar cost of the additions or improvements, **plus** the value of any work you may have done yourself?

$ 9 DIGITS  
GO TO W73

99999998  DON'T KNOW  
99999999  REFUSED

Was it $25,000 or more?

1. YES  
5. NO  
8. DON'T KNOW  
9. REFUSED

$75,000 or more?

1. YES  
5. NO  
8. DK

GO TO W73

Since January 2005, did you [or anyone in your family living there] **put money into a business or farm**?

1. YES  
5. NO  
GO TO W78

Altogether, how much money did you [or anyone in your family living there] put into that?

$ 9 DIGITS  
GO TO W78

99999998  DON'T KNOW  
99999999  REFUSED

Was it $25,000 or more?

1. YES  
5. NO  
8. DON'T KNOW  
9. REFUSED

$100,000 or more?

1. YES  
5. NO  
8. DK

$10,000 or more?

1. YES  
5. NO  
8. DK

GO TO W78
W78 (G183). Since January 2005, did you [or anyone in your family living there] **sell part or all of your interest in a business or farm**?

| 1. YES | 5. NO | GO TO W83 |

W79 (G184). Altogether, how much money did you [or anyone in your family living there] get from that?

| $9 DIGITS | 999999998 | 999999999 |
| GO TO W83 | DON'T KNOW | REFUSED |

W80 (G185). Was it $25,000 or more?

| 1. YES | 5. NO | 8. DON'T KNOW | 9. REFUSED | GO TO W83 |

W81 (G186). $100,000 or more?

| 1. YES | 5. NO | 8. DK | GO TO W83 |

W82 (G187). $10,000 or more?

| 1. YES | 5. NO | 8. DK | GO TO W83 |

W83 (G188). Since January 2005, did you [or anyone in your family living there] **buy any shares of stock** in publicly held corporations, mutual funds, or investment trusts, including any automatic reinvestments -- not including any IRAs? (NOTE EXCLUSION OF IRAS--DIFFERENT FROM '94)

| 1. YES | 5. NO | GO TO W96 |

W84 (G189). Did you [or anyone in your family living there] also **sell** any such assets?

| 1. YES | 5. NO | GO TO W91 |

GO TO W85
W85 (G190). Did you **buy more** or **sell more**—that is, on balance, did you put money into stocks, mutual funds, or investment trusts, take money out of them, or put about as much in as you took out?

1. **PUT MONEY IN**
2. **TOOK MONEY OUT**
3. **PUT ABOUT AS MUCH IN AS TOOK OUT**  
   → GO TO W102

W86 (G191). About how much money did you [or anyone in your family living there] [put in/take out]?

- **$9 DIGITS**  
- 99999998 DON'T KNOW
- 99999999 REFUSED

W87 (G192). Was it $20,000 or more?

1. **YES**
5. **NO**
8. **DON'T KNOW**
9. **REFUSED**

W88 (G193). $50,000 or more?

1. **YES**  
5. **NO**  
8. **DK**  

GO TO W102

W89 (G195). $5,000 or more?

1. **YES**
5. **NO**
8. **DK**

GO TO W102

W90 (G194). $100,000 or more?

1. **YES**  
5. **NO**  
8. **DK**

GO TO W102

W91 (G196). Altogether, how much money did you [or anyone in your family living there] put in?

- **$9 DIGITS**
- 99999998 DON'T KNOW
- 99999999 REFUSED

W92 (G197). Was it $20,000 or more?

1. **YES**
5. **NO**
8. **DON'T KNOW**
9. **REFUSED**

W93 (G198). $50,000 or more?

1. **YES**
5. **NO**
8. **DK**

GO TO W102

W94 (G199). $100,000 or more?

1. **YES**  
5. **NO**  
8. **DK**

GO TO W102
W96 (G201). Since January 2005 did you [or anyone in your family living there] sell any shares of stock in publicly held corporations, mutual funds, or investment trusts? (EXCLUDES IRAS)

1. YES  
5. NO  
GO TO W102

W97 (G202). Altogether, how much money did you [or anyone in your family living there] get from that?

$ 9 DIGITS 
GO TO W102 

W98 (G203). Was it $20,000 or more?

1. YES  
5. NO  
8. DON'T KNOW  
9. REFUSED

W99 (G204). $50,000 or more?

1. YES  
5. NO  
8. DK  
GO TO W102

W101 (G206). $5,000 or more?

1. YES  
5. NO  
8. DK  
GO TO W102

W102 (G207). Sometimes changes in a family's savings or assets are due to people joining or leaving the family. Was there anyone living with you in January 2005 who doesn't live with you now and who took $5,000 or more in assets or debts away with them?

1. YES  
5. NO  
GO TO W112

W103 (G208). Altogether, what is the total dollar value of assets that were removed that way?

$ 9 DIGITS 
GO TO W108 

W104 (G203). Was it $10,000 or more?

1. YES  
5. NO  
8. DON'T KNOW  
9. REFUSED

W105 (G210). $25,000 or more?

1. YES  
5. NO  
8. DK  
GO TO W108

W107 (G212). $5,000 or more?

1. YES  
5. NO  
8. DK  
GO TO W108

W106 (G211). $100,000 or more?

1. YES  
5. NO  
8. DK  
GO TO W108
W108 (G213). Altogether, what is the total dollar value of debts that were removed that way?

$9$ DIGITS

GO TO W112

W109 (G214). Was it $10,000 or more?

1. YES
5. NO
8. DON'T KNOW
9. REFUSED

GO TO W112

W110 (G215). $25,000 or more?  W111 (G216). $5,000 or more?

1. YES
5. NO
8. DK

GO TO W112

W112 (G217). INTERVIEWER CHECKPOINT (VARNAME=W112CKPT)

W113 (G218). Is there anyone in your family living with you now who has joined the family since January 2005 and who had $5,000 or more in assets or debts at the time they joined the family?

1. YES
5. NO

GO TO W112

W114 (G219). Altogether, what is the total dollar value of assets that were brought into the family that way?

$9$ DIGITS

GO TO W119

W115 (G220). Was it $10,000 or more?

1. YES
5. NO
8. DON'T KNOW
9. REFUSED

GO TO W119

W116 (G221). $25,000 or more?  W118 (G223). $5,000 or more?

1. YES
5. NO
8. DK

GO TO W119

W117 (G222). $100,000 or more?

1. YES
5. NO
8. DK

GO TO W119
W119 (G224). Altogether, what is the total dollar value of **debts that were brought into the family** that way?

$9$ DIGITS
GO TO W123

W120 (G225). Was it $10,000 or more?

1. YES  5. NO  8. DON'T KNOW  9. REFUSED

GO TO W123

W121 (G226). $25,000 or more?

1. YES  5. NO  8. DK

GO TO W123

W122 (G227). $5,000 or more?

1. YES  5. NO  8. DK

GO TO W123

W123 (G228). Some people's assets come from gifts and inheritances. During the last two years, have you [or anyone in your family living there] received any large gifts or inheritances of money or property worth $10,000 or more?

1. YES  5. NO

GO TO W129 CHECKPOINT

W124 (G229). What year did you receive that?

(4-DIGIT VAR, CODES 2005-2007; 9997=NOT YET RECEIVED)

9997. NOT YET RECEIVED

GO TO W128

W125 (G230). How much was it worth altogether, at that time?

$9$ DIGITS
GO TO W128

W126 (G231). Would it amount to $25,000 or more?

1. YES  5. NO  8. DON'T KNOW  9. REFUSED

GO TO W128

W127 (G232). $75,000 or more?

1. YES  5. NO  8. DK

GO TO W128

W128 (G233). Did you receive any **other** large gifts or inheritances of money or property in the last two years?

1. YES

ASK W124-W128 AGAIN; MAX=3

5. NO

GO TO W129 CHECKPOINT
W129 CHECKPOINT – SEE DERESPONDENT, WHO IS RESPONDENT

RESPONDENT IS HEAD, WIFE, OR “WIFE”  ALL OTHERS  GO TO SECTION P

W129_INTRO. Now we’d like to know how you feel about some family issues such as taking care of your parents and leaving inheritances for your children or others.

W129. Some people think that leaving an estate or inheritance to your children or other relatives is very important, while others do not. Would you say this is very important, quite important, not important, or not at all important?

1. VERY IMPORTANT  2. QUITE IMPORTANT  3. NOT IMPORTANT  4. NOT AT ALL IMPORTANT

W130. What about leaving an estate or inheritance to a church, synagogue, mosque or religious organization? (Would you say this is very important, quite important, not important, or not at all important?)

1. VERY IMPORTANT  2. QUITE IMPORTANT  3. NOT IMPORTANT  4. NOT AT ALL IMPORTANT

W131. (What about) Leaving an estate or inheritance to charity? (Would you say this is very important, quite important, not important, or not at all important?)

1. VERY IMPORTANT  2. QUITE IMPORTANT  3. NOT IMPORTANT  4. NOT AT ALL IMPORTANT

W132. (What about) Paying for your children’s education? (Would you say this is very important, quite important, not important, or not at all important?)

1. VERY IMPORTANT  2. QUITE IMPORTANT  3. NOT IMPORTANT  4. NOT AT ALL IMPORTANT

W133. How many living children under the age of 30 do you have? (00-25)

If “None”, ENTER ‘00’

_____ 01-25  00. NONE  GO TO W135

W134_(1-3). When your [child/oldest child/next oldest child/third (oldest) child] is in his or her prime earning years, do you expect his or her household’s earnings to be higher or lower than your household’s earnings at comparable ages? Would you say much higher, somewhat higher, the same, somewhat lower, or much lower?

1. MUCH HIGHER  2. SOMewhat HIGHER  3. SAME  4. SOMewhat LOWER  5. MUCH LOWER

W134 CHECKPOINT – SEE W133, NUMBER OF KIDS UNDER 30

W133 = ONE CHILD  W133 = MORE THAN ONE CHILD

GO TO W135  ASK W134 FOR EACH ADDITIONAL CHILD (MAX=3), THEN GO TO W135
W135 (KL37). Were [your/Head’s] parents poor when [you were/he was/she was] growing up, pretty well off, or what?

1. POOR  3. AVERAGE; "IT VARIED"  5. PRETTY WELL OFF

W136 CHECKPOINT– SEE WTRWQW, WHETHER WIFE/"WIFE" IN FU

WIFE/"WIFE" IN FU  ALL OTHERS → GO TO W137

W136 (KL37). Were [your/Wife’s/"Wife’s"] parents poor when [you were/he was/she was] growing up, pretty well off, or what?

1. POOR  3. AVERAGE; "IT VARIED"  5. PRETTY WELL OFF

W137. Are [your/Head’s] parents still living?

1. YES, ONE PARENT LIVING  2. YES, BOTH PARENTS LIVING  5. NO, NEITHER PARENT LIVING - BOTH PARENTS DECEASED

W138 CHECKPOINT– SEE WTRWQW, WHETHER WIFE/"WIFE" IN FU

WIFE/"WIFE" IN FU  ALL OTHERS → GO TO W139

W138. Are [your/Wife’s/"Wife’s"] parents still living?

1. YES, ONE PARENT LIVING  2. YES, BOTH PARENTS LIVING  5. NO, NEITHER PARENT LIVING - BOTH PARENTS DECEASED

W139. In the past, did [you/you or Head/you or Wife/"Wife”] give significant financial support to [your parents / your or Head’s parents / your or Wife’s/"Wife’s” parents]?

1. YES  5. NO

W140 CHECKPOINT – WHETHER PARENTS OF HEAD OR WIFE/"WIFE" ARE LIVING

AT LEAST ONE PARENT OF HEAD OR WIFE/"WIFE" IS LIVING  ALL PARENTS OF HEAD AND WIFE/"WIFE" ARE DECEASED → GO TO W141

W140. In the future, are [you/you or Head/you or Wife/"Wife”] planning to give significant financial support to [your or W’s/"W’s" parents / your or Head’s parents]?

1. YES  5. NO

W141. In the past, did [you/you or Head/you or Wife/"Wife”] spend a lot of time caring for [your parents / your or Head’s parents / your or Wife’s/"Wife’s” parents]?

1. YES  5. NO
W142 CHECKPOINT– WHETHER PARENTS OF HEAD OR WIFE/"WIFE" ARE LIVING

AT LEAST ONE PARENT OF HEAD OR WIFE/"WIFE" IS LIVING

ALL PARENTS OF HEAD AND WIFE/"WIFE" ARE DECEASED

GO TO W143

W142. In the future, are [you/you or Head/you or Wife/"Wife")] planning to spend a lot of time caring for [your or W’s/"W’s" parents / your or Head’s parents]?

1. YES  5. NO

W143. In the past, did [your parents /your or Head’s parents / your or Wife’s/"Wife’s" parents] live with [you/you and Head/you and Wife/"Wife"] one year or longer in your home?

1. YES  5. NO

W144 CHECKPOINT– WHETHER PARENTS OF HEAD OR WIFE/"WIFE" ARE LIVING

AT LEAST ONE PARENT OF HEAD OR WIFE/"WIFE" IS LIVING

ALL PARENTS OF HEAD AND WIFE/"WIFE" ARE DECEASED

GO TO SECTION P

W144. In the future, do you expect [your or W’s/"W’s" parents / your or Head’s parents] will live with [you/you and Head/you and Wife/"Wife"] one year or longer in your home?

1. YES  5. NO
SECTION P: HEAD'S AND WIFE'S/"WIFE'S" PENSIONS

P0. INTERVIEWER CHECKPOINT (VARNAME=P0CKPT)

1. HEAD WORKING NOW, ONLY TEMPORARILY LAID OFF, ON SICK/MATERNITY LEAVE (BC=1, 2 OR BC3=1) → ALL OTHERS

2. HEAD HAS NEVER WORKED FOR MONEY (BC62=5, 8, 9) → 5. ALL OTHERS

3. ALL OTHERS → GO TO P42

P1P71. Next I need to get some information about any pension or retirement plan you [HEAD/W/"W"] may be eligible for at [your/ his/her] place of work or through [your/ his/her] union. Not including Social Security or Railroad Retirement, [are you/is he/she] covered by a pension or retirement plan on [your/his/her] present job, at [NAME OF CMJ EMPLOYER FROM BC18b]?

1. YES → 5. NO → 8. DK

P7P77. Will [you/ he/she] be covered by such a plan if [you/ he/she] continue[s] to work for this employer?

1. YES → 5. NO → 8. DK

GO TO P42

P8P78. How many more years must [you/ he/she] work for this employer to be included in this plan? (P8YRS, 3 DIGITS, RANGE=1-50)

GO TO P42

P6P76. How many years [have you/has he/she] been included in the main or basic pension or retirement plan? (P6YRS, 2 DIGITS, RANGE=0-50; P6YR (4-DIGIT, RANGE=1901-2007)

P9P79. There is a law that states that once you have been in a pension or retirement plan for enough years, you can be sure of some benefits even if you leave that employer. This is called "vesting". [Have you/ Has he/she] worked under the main or basic plan long enough to earn this right to be "vested"?

1. YES → 5. NO → 8. DK

GO TO P11P81

P10P80. How many more years must [you/ he/she] be included in this plan in order to eventually earn the right to receive some benefits from it at retirement even if [you/ he/she] leave[s] [your/ his/her] present employer? (P10YRS, 3-DIGITS, RANGE=1-35)
P11P81. [Are you/is he/she] making any contributions to [your/ his/her] pension or retirement plan such as having money deducted from your [your/ his/her] pay?

1. YES  5. NO  GO TO P16P86

P12P82. [Are you/is he/she] required to contribute?

1. YES  5. NO  GO TO P15P85

P13P83. What amount or percent of pay [are you/is he/she] required to contribute?

(THREE VARS: P13AMT, 7-DIGIT VAR; P13PER, USES TPERWK CODE; P13PCT IS 3 DIGITS, RANGE=0-25)

P14P84. [Do you/Does he/she] also make voluntary contributions?

1. YES  5. NO  8. DK

GO TO P16P86

P15P85. What amount or percent of pay [do you/ does he/she] voluntarily contribute currently?

(THREE VARS: P15AMT, 7-DIGIT VAR; P15PER, USES TPERWK CODE; P15PCT IS 3 DIGITS, RANGE=0-25)

P16P86. Some pension or retirement plans have a definite formula based on years of service or salary, often called defined benefit plan. Some plans base benefits on how much money has accumulated in a person's pension or retirement account. Other plans use both ways of setting benefits.

How are the benefits for your [HEAD/W/"W"]'s pension determined -- by a defined benefit formula based on years of service or salary, by the amount of money in your account, or in both ways?

1. DEFINED BENEFIT FORMULA  3. BOTH  5. MONEY ACCUMULATED IN ACCOUNT  DK/RF

GO TO P22P92  GO TO P22P92

P17P87. Does [your/ his/her] employer make contributions to [your/his] account?

1. YES  5. NO  GO TO P20P90

P18P88. What amount or percent of pay does [your/ his/her] employer contribute to [your/ his/her] account?

(THREE VARS: P18AMT, 7-DIGIT VAR; P18PER, USES TPERWK CODE; P18PCT IS 3 DIGITS RANGE=0-25)

P19P89. At what age could [you/ he/she] first receive retirement benefits that include [your/ his/her] employer's contributions?

(P19AGE, 3 DIGITS, 31-99)
P20P90. What is the approximate dollar amount in [your/ his/her] account now?

$9 DIGITS
99999998 DON'T KNOW 99999999 REFUSED

GO TO P20A

P20B. Is it $10,000 or more?

1. YES 5. NO 8. DON'T KNOW 9. REFUSED

GO TO P20AP90A

P20C. $20,000 or more?

1. YES 5. NO 8. DK

GO TO P20AP90A

P20D. $50,000 or more?

1. YES 5. NO 8. DK

GO TO P20AP90A

P20E. $150,000 or more?

1. YES 5. NO 8. DK

GO TO P20AP90A

P20AP90A. Are the funds invested mostly in stocks or mostly in bonds and annuities, some of each, or what?

1. MOSTLY (OR ALL) STOCKS 2. SOME OF EACH 3. MOSTLY (OR ALL) BONDS AND ANNUITIES

P21P91. How much could [you/ he/she] take out of this account today if [you/ he/she] were to leave this employer?
(THREE VARS: P21AMT, 9-DIGIT VAR; P21PER, USES TPER MO; P21PCT IS 3 DIGITS RANGE=0-100)

P22P92. INTERVIEWER CHECKPOINT (VARNAME=P22CKPT)

P16P86=DEFINED BENEFIT FORMULA
P16P86=BOTH
P16P86=MONEY ACCUMULATED IN ACCOUNT
P16P86=DK/RF

GO TO P20AP90A

P23P89. What is the formula for determining when [you/ he/she] could receive full benefits -- is it based on [your/ his/her] age, the number of years of service, a combination of age and years of service, or what?

1. AGE 2. YEARS 3. COMBINATION
7. OTHER 8. DK

GO TO P26
GO TO P27P97

P24P90. How old must [you/ he/she] be?
(P24AGE, 3 DIGITS, 31-75)

GO TO P27P97

P25P91. How many years is that?
(P24YRS, 3 DIGITS, 1-50)

GO TO P27P97

P26P96. How old must [you/he/she] be and how many years is that?
(TWO VARS, BOTH 3 DIGITS: P26AGE USING 31-75 AND P26YRS USING 1-50)
P27P97. Could [you/he/she] retire [before age [P24AGE]/before [P25YRS] years of service/before age [P26AGE] and [P26YRS] years of service/early] and receive part but not full retirement benefits from this plan?

1. YES
5. NO
GO TO P32P102

P28P98. What is the formula for determining the earliest date [you/he/she] could retire and begin drawing at least partial benefits -- is it based on [your/his/her] age, the number of years of service, a combination of age and years of service, or what?

1. AGE
2. YEARS
3. COMBINATION
7. OTHER
8. DK
GO TO P31P101
GO TO P32P102
GO TO P32P102

P31P101. How old must [you/he/she] be and how many years is that?
(TWO VARS, BOTH 3 DIGITS: P31AGE USING 31-75 AND P31YRS USING 1-50)

P32P102. At what age [do you/does he/she] expect to start receiving retirement benefits from this pension or retirement plan?
(3 DIGITS, 18-75 & 997)

997. NEVER; WON'T STAY LONG ENOUGH

P33P103. Some people can estimate what their pension or retirement benefits will be in dollars per month or year, but others find it easier to estimate it as a fraction of their final pay. Can [you/he/she] estimate what [your/his/her] benefits from this plan will be, either way?

1. YES
5. NO
GO TO P35P105

P34P104. How much will that be?
(FOUR VARS: P34AMT, 7-DIGIT VAR; P34PER, USES TPERM CODE; P34PCT IS 3 DIGITS RANGE=0-100; P34LUMP, 9 DIGITS)

$ 6 DIGITS (P34AMT)
GO TO P35P105

P34AMT = 999998
DON'T KNOW
P34AMT = 999999
REFUSED

P34B. Will it be $1,000 or more per month?

1. YES
5. NO
8. DON'T KNOW
9. REFUSED
GO TO P35P105

P34C. $2,000 or more (per month)?

1. YES
5. NO
8. DK
GO TO P35P105

P34D. $3,000 or more (per month)?

1. YES
5. NO
8. DK
GO TO P35P105

P34E. $500 or more (per month)?

1. YES
5. NO
8. DK
GO TO P35P105
P35P105. Can [you/ he/she] designate a survivor or other person who would receive [your/ his/her] pension or retirement benefits if [you/ he/she] should die before receiving [your/ his/her] full entitlement?

1. YES  5. NO  → GO TO P37P107

P36P106. How much of [your/ his/her] pension or retirement benefit would [your/ his/her] beneficiary receive if they were to live longer than [you/ him/her] -- all of it, some of it, or none of it?

1. ALL  3. SOME  5. NONE  7. OTHER

P37P107. Does the amount of [your/ his/her] pension or retirement benefit depend on Social Security benefits? That is, when [you/ he/she] start[s] receiving Social Security benefits will [your/ his/her] pension or retirement benefits be reduced?

1. YES  5. NO  → GO TO P39P109

P38P108. When will this change take place: automatically at age 62, automatically at age 65, when [you/ he/she] start[s] receiving Social Security benefits, or at some other time?

1. AT AGE 62  2. AT AGE 65  3. WHEN SOCIAL SECURITY BENEFITS BEGIN  7. AT SOME OTHER TIME

P39P109. On [your/ his/her] present job, at [NAME OF EMPLOYER FROM BC18B FOR CMJ], what is the usual retirement age (or years of service) for people who work with [you/ him/her] or have the same kind of job?

(TWO VARS, EACH 2 DIGITS: P39AGE=20-75 AND P39YRS=1-50)

P40P110. Now I want to ask about [your/ his/her] retirement plans. At what age (or year) [do you/does he/she] plan to stop working?

(TWO VARS: P40AGE=17-75 & 997; P40YR=2007-2080)

ACTUAL AGE OR YEAR GIVEN

997. NEVER

998. DK

GO TO P42P112

P41P111. At what age (or year) [do you/does he/she] think [you/ he/she] will stop working?

(TWO VARS: P41AGE=17-75 & 997; P41YR=2007-2080)

ACTUAL AGE OR YEAR GIVEN

997. NEVER

998. DK

P42P112. [In addition to the pension or retirement plan you already mentioned,] do you [does HEAD/W/"W"] have any tax-deferred compensation or savings plans on this job, such as a "thrift", profit-sharing, or Keogh plan?

1. YES  5. NO  → GO TO P45P115

P43P113. Does [your/ his/her] employer make contributions to any such plan for [you/him/her]?

1. YES  5. NO  → GO TO P45P115

P44P114. What amount or percent of pay does [your/ his/her] employer contribute?

(THREE VARS: P44AMT, 7-DIGIT VAR; P44PER, USES TPERWK CODE; P44PCT IS 3 DIGITS RANGE=0-100)
P45P115. These next questions are about pensions or retirement plans through a former employer. Aside from IRA or Keogh Plans, are you [is HEAD/W/"W"] included in a pension or retirement plan, or in any tax-deferred savings plan, through a former employer?

1. YES  5. NO  GO TO P70P140

P46P116. [IF NO PENSION ABOVE: I would like to know what type of plan this was. In some pension and retirement plans, Type A, benefits are usually based on a formula involving age, years of service, and salary. In other plans, Type B, money is accumulated in an account for you. Was that a Type A or Type B plan? / IF PENSION AT P1, ET AL. ABOVE: What type of plan was this second pension or retirement plan? Type A, where benefits are usually based on a formula involving age, years of service, and salary or Type B, where money is accumulated in an account?]

IWER: "TYPE A" plans are often called "DEFINED BENEFIT" plans. "TYPE B" plans, often called "DEFINED CONTRIBUTION" plans, include 401-K, 403-B, ESOP, SRA, Thrift/Savings, Stock/Profit Sharing, and Money Purchase plans

1. TYPE A  2. TYPE B  3. BOTH TYPES  8. DK  9. RF

GO TO P52P122  GO TO P62aP132a  GO TO P52P122  GO TO P70P140

P47P117. For the part of [your/ his/her] pension or retirement plan where money is accumulated in an account, how much money was in [your/ his/her] account when [you/ he/she] left that employer? (8 DIGITS)

$7 DIGITS  GO TO P48P118

999998  DON'T KNOW  999999  REFUSED

P47B. Was it $20,000 or more?

1. YES  5. NO  8. DON'T KNOW  9. REFUSED

GO TO P48P118

P47C. $50,000 or more?

1. YES  5. NO  8. DK

GO TO P48P118

P47D. $150,000 or more?

1. YES  5. NO  8. DK

GO TO P48P118

P47E. $5,000 or more?

1. YES  5. NO  8. DK

GO TO P48P118

P48P118. When [you/ he/she] left that employer, did [you/ he/she] withdraw this money, roll it over into an IRA, leave it to accumulate in the old plan, convert it to an annuity, or what?

If more than one response given, USE 7 (OTHER) and RECORD all details

1. WITHDREW THE MONEY  2. ROLLED OVER INTO IRA  3. LEFT TO ACCUMULATE  4. CONVERTED TO ANNUITY  7. OTHER (SPECIFY)  8. DK  9. RF

GO TO P52P122  GO TO P49P119  GO TO P50P120  GO TO P52P122
P49P119. How much is in [your/ his/her] account now?

$ 8 DIGITS

GO TO P52P122

P49B. Is it $10,000 or more?

1. YES
5. NO
8. DON'T KNOW
9. REFUSED

GO TO P52P122

P49C. $20,000 or more?

1. YES
5. NO
8. DK

GO TO P52P122

P49D. $50,000 or more?

1. YES
5. NO
8. DK

GO TO P52P122

P49E. $150,000 or more?

1. YES
5. NO
8. DK

GO TO P52P122

P50P120. How old [were you/was he/she] when [you/ he/she] started receiving the benefits from that annuity?
(2 DIGITS, 20-75)

If benefits have not yet begun: At what age will [you/ he/she] begin receiving them?

P51P121. How much are the annuity benefits per month or year?
(TWO VARS: P51, 7-DIGIT VAR; P50PER, USES TPERMO CODE)

If benefits have not yet started, RECORD what benefits will be.

$ 7 DIGITS

GO TO P52P122

P51B. Are they $400 or more per month?

1. YES
5. NO
8. DON'T KNOW
9. REFUSED

GO TO P52P122

P51C. $1,200 or more (per month)?

1. YES
5. NO
8. DK

GO TO P52P122

P51D. $1,600 or more (per month)?

1. YES
5. NO
8. DK

GO TO P52P122

P51E. $200 or more (per month)?

1. YES
5. NO
8. DK

GO TO P52P122
P52P122. [Now about the part of [your/ his/her] pension or retirement plan where benefits are based on a formula.] Do you [Does HEAD/W/"W"] expect to receive benefits from this plan in the future, [are you/is he/she] receiving benefits now, did [you/ he/she] get a cash settlement when [you/ he/she] left, did [you/ he/she] lose [your/ his/her] benefits, or what?

DO NOT PROBE for multiple responses but ENTER all that apply.

1. EXPECT FUTURE BENEFITS  
2. RECEIVING BENEFITS NOW  
3. RECEIVED CASH SETTLEMENT  
4. ROLLED OVER INTO IRA  
5. LOST BENEFITS  
7. OTHER (SPECIFY)

P52aP122a. INTERVIEWER CHECKPOINT (VARNAME=P52ACKPT)

WHETHER RECEIVING BENEFITS NOW—ONE MENTION AT P52P122=2

P52P122= RECEIVING BENEFITS  
ALL OTHERS → GO TO P56aP126a

P53P123. In what month and year did [you/ he/she] start to receive these benefits?
(TWO VARS: P53MO USES TMONTH; P53YR USES TYEAR)

P54P124. How much are the benefits per month or year?
(TWO VARS: P54 7 DIGIT VAR; P54PER USES TPERMO)

$ 7 DIGITS  
999998  
999999  
DON'T KNOW  
9999999  
REFUSED

GO TO P55P125

P54B. Are they $400 or more per month?

1. YES  
5. NO  
8. DK

P54C. $1,200 or more (per month)?  
1. YES  
5. NO  
8. DK

GO TO P55P125

P54D. $1,600 or more (per month)?  
1. YES  
5. NO  
8. DK

GO TO P55P125

P54E. $200 or more (per month)?  
1. YES  
5. NO  
8. DK

GO TO P55P125

P55P125. Are the benefits adjusted for changes in the cost of living?

1. YES  
5. NO  
8. DK

GO TO P56P126aA

P56P126. Have they ever been adjusted for changes in the cost of living?

1. YES  
5. NO
P56aP126a. INTERVIEWER CHECKPOINT (VARNAME=P56ACKPT)

WHETHER RECEIVED CASH—ONE MENTION AT P52P122=3

| P52P122=RECEIVED CASH | ALL OTHERS | GO TO P58AP128a |

P57P127. How much did that cash settlement amount to?

- $7 DIGITS
  - 9999998 DON'T KNOW
  - 9999999 REFUSED

GO TO P58P128

P57B. Was it $6,000 or more?

- 1. YES
- 5. NO
- 8. DON'T KNOW
- 9. REFUSED

GO TO P58P128

P57C. $60,000 or more?

- 1. YES
- 5. NO
- 8. DK

GO TO P58P128

P57D. $250,000 or more?

- 1. YES
- 5. NO
- 8. DK

GO TO P58P128

P57E. $2,000 or more?

- 1. YES
- 5. NO
- 8. DK

GO TO P58P128

P58P128. What did [you/he/she] do with the money?

ENTER all that apply

- 1. BOUGHT DURABLES
- 2. SPENT IT
- 3. SAVED INVESTED
- 4. PAID OFF DEBT
- 5. ROLLED INTO IRA
- 7. OTHER (SPECIFY)
P58P128a. INTERVIEWER CHECKPOINT (VARNAME=P58ACKPT)

WHETHER ROLLED OVER INTO IRA—ONE MENTION AT P52P112=4

P52P112=ROLLED OVER INTO IRA  ALL OTHERS  GO TO P59aP129a

P59P129. How much did that IRA rollover amount to?

$ 7 DIGITS 9999998 9999999
GO TO P59aP129a
DON'T KNOW  REFUSED

P59B. Was it $6,000 or more?

1. YES  5. NO  8. DON'T KNOW  9. REFUSED
GO TO P59aP129a

P59C. $60,000 or more?

1. YES  5. NO  8. DK
GO TO P59aP129a

P59D. $250,000 or more?

1. YES  5. NO  8. DK
GO TO P59aP129a

P59E. $2,000 or more?

1. YES  5. NO  8. DK
GO TO P59aP129a

GO TO P59aP129a
P59aP129a.   INTERVIEWER CHECKPOINT (VARNAME=P59ACKPT)

WHETHER EXPECT FUTURE BENEFITS—ONE MENTION AT P52P112=1

P52P112=EXPECT BENEFITS     ALL OTHERS     GO TO P67aP137a

P60P130. For how many years altogether [were you/was he/she] included in this plan?
          (2 DIGITS, CODES 1-50)
          Include years with other employers if same plan.

P61P131. At what age [do you/does he/she] expect to start receiving [the rest of [your/ his/her]] benefits from this
          plan?
          (P61AGE, CODES 20-75 & 97)

97. ALREADY RECEIVING ALL BENEFITS

P62P132. Can you estimate what [you/ he/she] expect[s] these benefits to be? Either in dollars per month or year, or
          as a percent of [your/ his/her] pay when [you/ he/she] left that job?
          (FOUR VARS: P62AMT, 6-DIGIT VAR; P624PER, USES TPERMO CODE; P62PCT=1-100;
          P62LUMP, 8 DIGITS)

$6 DIGITS (P62AMT)     P62AMT = 999998     P62AMT = 999999
      DON'T KNOW     REFUSED
      GO TO P62aP132a

P62B. Will it be $1,000 or more per month?

1. YES     5. NO     8. DON'T KNOW     9. REFUSED

P62C. $2,000 or more (per month)?

1. YES     5. NO     8. DK

GO TO P62aP132a

P62E. $500 or more (per month)?

1. YES     5. NO     8. DK

GO TO P62aP132a

P62D. $3,000 or more (per month)?

1. YES     5. NO     8. DK

GO TO P62aP132a
P62aP132a. INTERVIEWER CHECKPOINT (VARNPAME=P62ACKPT)


DK/RF LUMP/AMT AT
P62P132

TYPE B PENSION AT
P46P116

ALL OTHERS

GO TO
P67aP137a

P63. How much money was in [your/ his/her] account when [you/ he/she] left that employer?

$ 7 DIGITS
GO TO P64P134

9999998
DON'T KNOW

9999999
REFUSED

P63B. Was it $20,000 or more?

1. YES

5. NO

8. DON'T KNOW

9. REFUSED

GO TO P64P134

P63C. $50,000 or more?

1. YES

5. NO

8. DK

GO TO P64P134

P63D. $150,000 or more?

1. YES

5. NO

8. DK

GO TO P64P134

P63E. $5,000 or more?

1. YES

5. NO

8. DK

GO TO P64P134
P64P134. When [you/ he/she] left that employer, did [you/ he/she] transfer [your/ his/her] account to a new employer, roll it over into an IRA, leave it to accumulate in [your/ his/her] old plan, convert it to an annuity or what?

If more than one response given, USE 7 (OTHER) and RECORD all details

P65P135. How much is in [your/ his/her] account now?

$ 8 DIGITS
GO TO P67aP137a

9999998 DON'T KNOW
9999999 REFUSED

P65B. Is it $10,000 or more?

1. YES
5. NO
8. DONT KNOW
9. REFUSED
GO TO P67aP137a

P65C. $20,000 or more?

1. YES
5. NO
8. DK
GO TO P67aP137a

P65D. $50,000 or more?

1. YES
5. NO
8. DK
GO TO P67aP137a

P65E. $150,000 or more?

1. YES
5. NO
8. DK
GO TO P67aP137a

P66P136. How old [were you/was he/she] when [you/ he/she] started receiving the benefits that annuity?
(P66AGE, CODES 20-75)

If benefits have not yet begun: At what age will [you/ he/she] begin receiving them?
P67P137. How much are the annuity benefits per month or year? (TWO VARS: P67, 7 DIGITS; P67PER USES TPERMO)

If benefits have not yet started, RECORD what benefits will be.

$ 7 DIGITS
GO TO P67aP137a

| 9999998 | DONT KNOW |
| 9999999 | REFUSED |

P67aP137a. INTERVIEWER CHECKPOINT (VARNANE=P67ACKPT)

SEE P46P116--TYPE OF PENSION

TYPE A/B/COMBO/DK (P46P116=1, 2, 3, 8)

ALL OTHERS (P46P116=9)

GO TO P69P139

P68P138. What is the earliest age at which [you/he/she] could have left that employer and begun to receive pension or retirement benefits? (P68AGE, CODES 20-75 & 97)

97. NO AGE REQUIREMENT

P69P139. Do you [Does HEAD/W" W"] have any other pensions or retirement plans from a former employer [that you haven't already told me about]?

1. YES
5. NO

GO TO P70

REPEAT P45P115 - P68P138 FOR SECOND PENSION

P70. INTERVIEWER CHECKPOINT (VARNANE=P70ACKPT)

SEE FU LISTING--IF SOMEONE LISTED HAS CYFUHU=1, 4 AND CYAQRTH=202, 222

1. WIFE/"WIFE" IN FU NOW
5. ALL OTHERS

GO TO SECTION H

ASK P71-P139 FOR WIFE/"WIFE" (QREFS IN 99 & 2004=P71-P139, EXACTLY EQUIVALENT)
SECTION H: HEALTH OF HEAD AND WIFE/"WIFE" AND HEALTH CARE COSTS

H1 – H23 ASKED ABOUT HEAD FIRST, THEN WIFE/"WIFE"

H1. Now I have a few questions about [your/HEAD/WF/"WF"] health. Would you say [your/HEAD/WF/"WF"] health in general is excellent, very good, good, fair, or poor?

1. EXCELLENT  2. VERY GOOD  3. GOOD  4. FAIR  5. POOR

H1A. [Since we last talked to you about [your/his/her] health, Compared to [your/his/her] health say, two years ago,] would you say that [your/his/her] health is better now, about the same, or worse?

1. BETTER  3. ABOUT THE SAME  5. WORSE

H1B. Is it much better or somewhat better?

1. MUCH BETTER  2. SOMewhat BETTER

H1C. Is it much worse or somewhat worse?

1. MUCH WORSE  2. SOMEWHAT WORSE

NOTE: H1D is now H26 for 2007-2011, part of a group of new Childhood Health questions

H2. [Do you/Does HEAD/WF/"WF"] have any physical or nervous condition that limits the type of work or the amount of work [you/he/she] can do?

1. YES  5. NO  → GO TO H5A

H3. Does this condition keep [you/HEAD/ WF/"WF"] from doing some types of work?

1. YES  5. NO  7. CAN DO NOTHING (VOL)  → GO TO H5A

H4. For work [you/ HEAD/WF/"WF"] can do, how much does it limit the amount of work [you/HEAD/ WF/"WF"] can do-- a lot, somewhat, or just a little?

1. A LOT  3. SOMEWHAT  5. JUST A LITTLE  7. NOT AT ALL (VOL)
H5A. These next questions ask you about health conditions that a doctor or other health professional has EVER told [you/HEAD/WF/"WF"] that [you have/he/she has] or had in [your/his/her] LIFETIME.

Has a doctor or other health professional ever told [you/HEAD/WF/"WF"] that [you have/he/she has] or had...

A stroke?

1. YES  5. NO  → GO TO H5B

H6A1. How old [were you/was HEAD/WF/"WF"] the first time [you/he/she] had a stroke?

___ Number of Years Old (0...120)

H6A2. [Have you/Has he/she] had [IF H6a1 IS MORE THAN 1 YEAR AGO: another stroke at any time in the past 12 months/ELSE: a second or subsequent stroke since that first one]?

1. YES  5. NO

H7A. How much does this (condition/problem) limit [your/his/her] normal daily activities? -- A lot, somewhat, just a little, or not at all?

1. A LOT  3. SOMEWHAT  5. JUST A LITTLE  7. NOT AT ALL

H5B (H5f). (IF H5A = YES: Has a doctor or other health professional ever told [you/HEAD/WF/"WF"] that [you have/he/she has] or had…)

A heart attack?

1. YES  5. NO  → GO TO H5C

H6B1. How old [were you/was HEAD/WF/"WF"] the first time [you/he/she] had a heart attack?

___ Number of Years Old (0...120)

H6B2. [Have you/Has he/she] had [IF H6b1 IS MORE THAN 1 YEAR AGO: another heart attack at any time in the past 12 months/ELSE: a second or subsequent heart attack since that first one]?

1. YES  5. NO

H7B. How much does this (condition/problem) limit [your/his/her] normal daily activities? -- A lot, somewhat, just a little, or not at all?

1. A LOT  3. SOMEWHAT  5. JUST A LITTLE  7. NOT AT ALL
H5C (H5g). \((IF \ H5B = YES:\) Has a doctor or other health professional ever told [you/HEAD/WF/"WF"] that [you have/he/she has] or had…)
Coronary heart disease, angina, or congestive heart failure?

1. YES  5. NO  ➔ GO TO H5D

H6C1. How old [were you/was HEAD/WF/"WF"] when [you were/he/she was] first diagnosed with (this condition/any of these conditions)?

_____Number of Years Old (0...120)

H6C2. Did this condition get much worse for a month or longer \([IF \ H6c1 \ IS \ MORE \ THAN \ 1 \ YEAR \ AGO:\) in the past 12 months/\ ELSE: since (you were/he was/she was) first diagnosed\]?

1. YES  5. NO

H7C (H7g). How much does this (condition/problem) limit [your/ his/her] normal daily activities? -- A lot, somewhat, just a little, or not at all?

1. A LOT  3. SOMEWHAT  5. JUST A LITTLE  7. NOT AT ALL

H5D (H5b). \((IF \ H5C = YES:\) Has a doctor or other health professional ever told [you/HEAD/WF/"WF"] that [you have/he/she has] or had…)
High blood pressure or hypertension?

1. YES  5. NO  ➔ GO TO H5E

H6D1. How old [were you/was HEAD/WF/"WF"] when [you were/he/she was] first diagnosed with high blood pressure or hypertension?

_____Number of Years Old (0...120)

H6D2. Did this condition get much worse for a month or longer \([IF \ H6d1 \ IS \ MORE \ THAN \ 1 \ YEAR \ AGO:\) in the past 12 months/\ ELSE: since (you were/he was/she was) first diagnosed\]?

1. YES  5. NO

H7D (H7b). How much does this (condition/problem) limit [your/ his/her] normal daily activities? -- A lot, somewhat, just a little, or not at all?

1. A LOT  3. SOMEWHAT  5. JUST A LITTLE  7. NOT AT ALL
H5E (H5j). *(IF H5D = YES: Has a doctor or other health professional ever told [you/HEAD/WF/"WF"] that [you have/he/she has] or had…)*

Asthma?

1. YES 5. NO → GO TO H5F

H6E1. How old [were you/was HEAD/WF/"WF"] when [you were/he/she was] first diagnosed with asthma?

____Number of Years Old (0...120)

H6E2. Did this condition get much worse for a month or longer *[IF H6e1 IS MORE THAN 1 YEAR AGO: in the past 12 months/ELSE: since (you were/he was/she was) first diagnosed]*?

1. YES 5. NO

H7E (H7j). How much does this (condition/problem) limit [your/ his/her] normal daily activities? -- A lot, somewhat, just a little, or not at all?

1. A LOT 3. SOMEWHAT 5. JUST A LITTLE 7. NOT AT ALL

H5F (H5e). *(IF H5E = YES: Has a doctor or other health professional ever told [you/HEAD/WF/"WF"] that [you have/he/she has] or had…)*

Chronic lung disease such as bronchitis or emphysema?

1. YES 5. NO → GO TO H5G

H6F1. How old [were you/was HEAD/WF/"WF"] when [you were/he/she was] first diagnosed with (lung disease/bronchitis/emphysema)?

____Number of Years Old (0...120)

H6F2. Did this condition get much worse for a month or longer *[IF H6f1 IS MORE THAN 1 YEAR AGO: in the past 12 months/ELSE: since (you were/he was/she was) first diagnosed]*?

1. YES 5. NO

H7F (H7e). How much does this (condition/problem) limit [your/ his/her] normal daily activities? -- A lot, somewhat, just a little, or not at all?

1. A LOT 3. SOMEWHAT 5. JUST A LITTLE 7. NOT AT ALL
H5G (H5c). \(\text{IF} \ H5F = \text{YES:}\) Has a doctor or other health professional ever told [you/HEAD/WF/"WF"] that [you have/he/she has] or had…)
Diabetes or high blood sugar?

1. YES  
5. NO  
GO TO H5H

H6G1. How old [were you/was HEAD/WF/"WF"] when [you were/he/she was] first diagnosed with diabetes?

___ Number of Years Old (0...120)

H6G2. Did this condition get much worse for a month or longer \[\text{IF} \ H6g1 \text{ IS MORE THAN 1 YEAR AGO:}\) in the past 12 months/ELSE: since (you were/he was/she was) first diagnosed]?

1. YES  
5. NO

H7G (H7c). How much does this (condition/problem) limit [your/ his/her] normal daily activities? -- A lot, somewhat, just a little, or not at all?

1. A LOT  
3. SOMEWHAT  
5. JUST A LITTLE  
7. NOT AT ALL

H5H (H5i). \(\text{IF} \ H5G = \text{YES:}\) Has a doctor or other health professional ever told [you/HEAD/WF/"WF"] that [you have/he/she has] or had…)
Arthritis or rheumatism?

1. YES  
5. NO  
GO TO H5I

H6H1. How old [were you/was HEAD/WF/"WF"] when [you were/he/she was] first diagnosed with (arthritis/rheumatism)?

___ Number of Years Old (0...120)

H6H2. Did this condition get much worse for a month or longer \[\text{IF} \ H6h1 \text{ IS MORE THAN 1 YEAR AGO:}\) in the past 12 months/ELSE: since (you were/he was/she was) first diagnosed]?

1. YES  
5. NO

H7H (H7i). How much does this (condition/problem) limit [your/ his/her] normal daily activities? -- A lot, somewhat, just a little, or not at all?

1. A LOT  
3. SOMEWHAT  
5. JUST A LITTLE  
7. NOT AT ALL
H5I (H5k). \textit{(IF H5H = YES: Has a doctor or other health professional ever told [you/HEAD/WF/"WF"] that [you have/he/she has] or had…)}

Permanent loss of memory or loss of mental ability?

1. YES 5. NO \rightarrow \text{GO TO H5J}

H6I1. How old [were you/was HEAD/WF/"WF"] when [you were/he/she was] first diagnosed with (loss of memory/mental ability)?

_____Number of Years Old (0...120)

H6I2. Did this condition get much worse for a month or longer \textit{[IF H6i1 IS MORE THAN 1 YEAR AGO: in the past 12 months/ELSE: since (you were/he was/she was) first diagnosed]}?

1. YES 5. NO

H7I (H7k). How much does this (condition/problem) limit [your/ his/her] normal daily activities? -- A lot, somewhat, just a little, or not at all?

1. A LOT 3. SOMEWHAT 5. JUST A LITTLE 7. NOT AT ALL

H5J (H5l). \textit{(IF H5I = YES: Has a doctor or other health professional ever told [you/HEAD/WF/"WF"] that [you have/he/she has] or had…)}

A learning disorder?

1. YES 5. NO \rightarrow \text{GO TO H5K}

H6J1. How old [were you/was HEAD/WF/"WF"] when [you were/he/she was] first diagnosed with a learning disorder?

_____Number of Years Old (0...120)

H6J2. Did this condition get much worse for a month or longer \textit{[IF H6j1 IS MORE THAN 1 YEAR AGO: in the past 12 months/ELSE: since (you were/he was/she was) first diagnosed]}?

1. YES 5. NO

H7J (H7l). How much does this (condition/problem) limit [your/ his/her] normal daily activities? -- A lot, somewhat, just a little, or not at all?

1. A LOT 3. SOMEWHAT 5. JUST A LITTLE 7. NOT AT ALL
H5K (H5d).  *(IF H5J = YES: Has a doctor or other health professional ever told [you/HEAD/WF/"WF"] that [you have/he/she has] or had…)*

Cancer or a malignant tumor?

1. YES  5. NO  GO TO H5L

H6K1.  How old [were you/was HEAD/WF/"WF"] when [you were/he/she was] first diagnosed with cancer?

___Number of Years Old (0...120)

H6K2.  Did the cancer get much worse for a month or longer *(IF H6k1 IS MORE THAN 1 YEAR AGO: in the past 12 months/ELSE: since (you were/he was/she was) first diagnosed)*?

1. YES  5. NO

H6K3.  Are you currently in treatment for your cancer, in remission, or has it been cured?

1. TREATMENT  2. REMISSION  3. CURED

H6K4.  What type of cancer [do you/does he/does she] have?  *(In what part of [your/his/her] body is it?)*

ENTER all that apply

1. BREAST CANCER  2. COLON CANCER  3. LUNG CANCER  4. LYMPHOMA OR LEUKEMIA
5. MELANOMA  6. PROSTATE  7. SKIN CANCER  8. UTERINE CANCER
9. OVARIAN CANCER  10. CERVICAL CANCER  97. OTHER (SPECIFY)

H7K (H7d). How much does this (condition/problem) limit [your/ his/her] normal daily activities? -- A lot, somewhat, just a little, or not at all?

1. A LOT  3. SOMEWHAT  5. JUST A LITTLE  7. NOT AT ALL
H5L (H5h). *(IF H5K = YES: Has a doctor or other health professional ever told [you/HEAD/WF/"WF"] that [you have/he/she has] or had…)*
Any emotional, nervous, or psychiatric problems?

1. YES  5. NO  → GO TO H5M

H6L1. How old [were you/was HEAD/WF/"WF"] when [you were/he/she was] first diagnosed?

___Number of Years Old (0...120)

H6L2. What was the diagnosis? What is the emotional/psychiatric disorder?

ENTER all that apply

1. DEPRESSION  2. BIPOLAR DISORDER (MANIA)  3. SCHIZOPHRENIA (PSYCHOSIS)
4. ANXIETY (PANIC)  5. PHOBIAS  6. ALCOHOL USE/ABUSE (ALCOHOLISM)
7. DRUG USE/ABUSE (DRUG ADDICTION)  8. OBSESSIVE COMPULSIVE DISORDER  97. OTHER (SPECIFY)

H6L3. Did the condition get much worse for a month or longer *[IF H6L1 IS MORE THAN 1 YEAR AGO: in the past 12 months/ELSE: since (you were/he was/she was) first diagnosed]*?

1. YES  5. NO

H7L (H7h). How much does this (condition/problem) limit [your/his/her] normal daily activities? -- A lot, somewhat, just a little, or not at all?

1. A LOT  3. SOMEWHAT  5. JUST A LITTLE  7. NOT AT ALL

H5M. Is there any other serious, chronic condition that a doctor or other health professional ever told [you/HEAD/WF/"WF"] that [you have/he/she has] or had?

1. YES  5. NO  → GO TO H8

H6M1. What is that (condition/problem)? [OPEN, STRING 500]

H6M2. How old [were you/was HEAD/WF/"WF"] when [you were/he/she was] first diagnosed?

___Number of Years Old (0...120)

H6M3. Did [your/his/her] condition get much worse for a month or longer *[IF H6m2 IS MORE THAN 1 YEAR AGO: in the past 12 months/ELSE: since (you were/he was/she was) first diagnosed]*?

1. YES  5. NO

H7M. How much does this (condition/problem) limit [your/his/her] normal daily activities? -- A lot, somewhat, just a little, or not at all?

1. A LOT  3. SOMEWHAT  5. JUST A LITTLE  7. NOT AT ALL
H8. [Were you/WAS HEAD/WF/WF] a patient in a hospital overnight or longer at any time during 2006?

1. YES  5. NO ➔ GO TO H9A

H8a. How many nights [were you/was HEAD] in a hospital altogether in 2006?

____Number of Times Per

1. NIGHTS (1-365)  2. WEEKS (1-52)

H9A. The next questions are about [your/HEAD/WF/WF] ability to do certain activities -- by [yourself/himself/herself] and without special equipment. Because of a health or physical problem, [do you/does he/she] have any difficulty…

bathing or showering?

1. YES  5. NO ➔ GO TO H9B

H10A1. Does someone usually help [you/him/her] with that activity?

1. YES  5. NO

H10A2. [Do you/Does he/she] usually use special equipment to do that activity?

1. YES  5. NO

H9B. (Because of a health or physical problem, [do you/does he/she] have any difficulty…)
dressing?

1. YES  5. NO ➔ GO TO H9C

H10B1. Does someone usually help [you/him/her] with that activity?

1. YES  5. NO

H10B2. [Do you/Does he/she] usually use special equipment to do that activity?

1. YES  5. NO

H9C. (Because of a health or physical problem, [do you/does he/she] have any difficulty…)
eating?

1. YES  5. NO ➔ GO TO H9D

H10C1. Does someone usually help [you/him/her] with that activity?

1. YES  5. NO

H10C2. [Do you/Does he/she] usually use special equipment to do that activity?

1. YES  5. NO
H9D. (Because of a health or physical problem, [do you/does he/she] have any difficulty…)
getting in or out of bed or a chair?

1. YES  5. NO  → GO TO H9E

H10D1. Does someone usually help [you/him/her] with that activity?

1. YES  5. NO

H10D2. [Do you/Does he/she] usually use special equipment to do that activity?

1. YES  5. NO

H9E. (Because of a health or physical problem, [do you/does HEAD/WF"] have any difficulty…)
walking?

1. YES  5. NO  → GO TO H9F

H10E1. Does someone usually help [you/him/her] with that activity?

1. YES  5. NO

H10E2. [Do you/Does he/she] usually use special equipment to do that activity?

1. YES  5. NO

H9F. (Because of a health or physical problem, [do you/does he/she] have any difficulty…)
getting outside?

1. YES  5. NO  → GO TO H9G

H10F1. Does someone usually help [you/him/her] with that activity?

1. YES  5. NO

H10F2. [Do you/Does he/she] usually use special equipment to do that activity?

1. YES  5. NO

H9G. (Because of a health or physical problem, [do you/does he/she] have any difficulty…)
using the toilet, including getting to the toilet?

1. YES  5. NO  → GO TO H11A

H10G1. Does someone usually help [you/him/her] with that activity?

1. YES  5. NO

H10G2. [Do you/Does he/she] usually use special equipment to do that activity?

1. YES  5. NO
H11A. The next questions are about doing other activities by [yourself /himself /herself] and without special equipment. Because of a health or physical problem, [do you/does HEAD/WF/"WF"] have any difficulty preparing [your/his/her] own meals?

1. YES  5. NO  7. DOES NOT DO

H11B. Is this because of a health or physical problem?

1. YES  5. NO

H11C. ([Do you/Does HEAD/WF/"WF"] have any difficulty) shopping for personal toilet items or medicines?

1. YES  5. NO  7. DOES NOT DO

H11D. Is this because of a health or physical problem?

1. YES  5. NO

H11E. ([Do you/Does HEAD/WF/"WF"] have any difficulty) managing [your/his/her] own money, such as keeping track of expenses or paying bills?

1. YES  5. NO  7. DOES NOT DO

H11F. Is this because of a health or physical problem?

1. YES  5. NO

H11G. ([Do you/Does HEAD/WF/"WF"] have any difficulty) using the telephone?

1. YES  5. NO  7. DOES NOT DO

H11H. Is this because of a health or physical problem?

1. YES  5. NO

H11J. ([Do you/Does HEAD/WF/"WF"] have any difficulty) doing heavy housework, like scrubbing floors or washing windows?

1. YES  5. NO  7. DOES NOT DO

H11K. Is this because of a health or physical problem?

1. YES  5. NO

H11L. ([Do you/Does HEAD/WF/"WF"] have any difficulty) doing light housework, like doing dishes, straightening up, or light housecleaning?

1. YES  5. NO  7. DOES NOT DO

H11M. Is this because of a health or physical problem?

1. YES  5. NO
H12A (H12). (I know you have already told me about [your/his/her] condition, but I need to ask these next questions anyway.) The next questions are about physical activities (exercise, sports, physically active hobbies…) that you may do in your LEISURE time.

How often [do you/does HEAD/WF/"WF"] do VIGOROUS activities for AT LEAST 10 MINUTES that cause HEAVY sweating or LARGE increases in breathing or heart rate?

(0…997) per

2. DAY
3. WEEK
4. TWO WEEKS
5. MONTH
6. YEAR
7. OTHER (SPECIFY)

H12B (H11n). How often [do you/does HEAD/WF/"WF"] do LIGHT OR MODERATE activities for AT LEAST 10 MINUTES that cause only LIGHT sweating or SLIGHT TO MODERATE increases in breathing or heart rate?

(0…997) per

2. DAY
3. WEEK
4. TWO WEEKS
5. MONTH
6. YEAR
7. OTHER (SPECIFY)

H12C. How often [do you/does HEAD/WF/"WF"] do physical activities specifically designed to STRENGTHEN your muscles such as lifting weights?

(0…997) per

2. DAY
3. WEEK
4. TWO WEEKS
5. MONTH
6. YEAR
7. OTHER (SPECIFY)

H13. [Do you/Does HEAD/WF/"WF"] smoke cigarettes?

1. YES
5. NO

H14. On the average, how many cigarettes per day [do you/does he/she] usually smoke?

___CIGARETTES (0...200)

H15. How old [were you/ was HEAD/WF/"WF"] when [you/he/she] first smoked cigarettes regularly?

___YEARS OLD (1...99)

GO TO H20

H16. Did [you/ HEAD/WF/"WF"] ever smoke cigarettes?

1. YES
5. NO

GO TO H20

H17. On average, how many cigarettes per day did [you/he/she] smoke?

___CIGARETTES (0...200)

H18. How old [were you/ was HEAD/WF/"WF"] when [you/he/she] last smoked cigarettes regularly?

___YEARS OLD (1...99)

H19. How old [were you/ was HEAD/WF/"WF"] when [you/he/she] first smoked cigarettes regularly?

___YEARS OLD (1...99)

GO TO H20
H20. [Do you/Does HEAD/WF/"WF"] ever drink any alcoholic beverages such as beer, wine, or liquor?

1. YES  5. NO  → GO TO H22

H21A (H21). In the last year, on average, how often did [you/HEAD/WF/"WF"] have any alcohol to drink? Would you say, less than once a month, about once a month, several times a month, about once a week, several times a week, or every day?

1. LESS THAN ONCE A MONTH  2. ABOUT ONCE A MONTH  3. SEVERAL TIMES A MONTH
4. ABOUT ONCE A WEEK  5. SEVERAL TIMES A WEEK  6. EVERY DAY
8. DK/ 9. RF  → GO TO H22

H21B (H21). In the last year, on the days [you drank/he/she drank], about how many drinks did [you/he/she] have?

____ NUMBER OF DRINKS
(1...25)

H21C. In the last year, on how many days [have you/has he/she] had [IF MALE HEAD THEN 'five' /ELSE 'four'] or more drinks on one occasion?

ENTER “0” for None

____ NUMBER OF DAYS
(0...365)

H22. About how much [do you/does HEAD/WF/"WF"] weigh?

If more than 400 pounds, ENTER “1” and F2 note

____ POUNDS
(50...400)

H23. How tall [are you/is HEAD/WF/"WF"]?

____ FEET  ____ INCHES
(H23Ft =2...7)  (H23In =0...11)

H24. INTERVIEWER CHECKPOINT - WHETHER WIFE/"WIFE" IN THE FU

1. WIFE/"WIFE" IN FU  5. ALL OTHERS  → GO TO H25_INTRO

ASK H1 - H23 ABOUT WIFE/"WIFE", THEN GO TO H25_INTRO
H25 – H45 & CALENDAR
ASKED ABOUT RESP FIRST, THEN SPOUSE (IF RESP IS HEAD OR WIFE/"WIFE")
ASKED ABOUT HEAD FIRST, THEN WIFE/"WIFE" (IF RESP IS PROXY OR OFUM)

H25_INTRO. These next questions ask about [your/Head’s/Wife’s/"Wife’s"] health during childhood, that is, before age 17.
[IF R IS PROXY OR OFUM, OR R IS H/W/"W" & ASKING ABOUT SPOUSE: I understand that it may be difficult for you to answer these questions, but please do your best.]

Enter “1” to continue

H25. Consider [your/Head’s/Wife’s/"Wife’s"] health while [you were/he was/she was] growing up, before [you were/he was/she was] 17 years old. Would you say that [your/his/her] health during that time was excellent, very good, good, fair or poor?

1. EXCELLENT  2. VERY GOOD  3. GOOD  4. FAIR  5. POOR

H26 (H1D). When [you were/he was/she was] growing up, before [you were/he was/she was] 17 years old, did [you/he/she] miss a month or more of school because of a health problem?

H27. Before [you were/he was/she was] 17 years old, did [you/he/she] have Measles?
(Before [you were/he was/she was] 17 years old, did [you/he/she] have…)

H28. Mumps?

H29. Chicken pox?

H30. Difficulty seeing, even with eye glasses or prescription lenses?

1. YES  5. NO

H31. Did [your/his/her] parents or guardians smoke during [your/his/her] childhood?

1. YES, ONE OF THEM  2. YES  3. NO, NONE

H32. Before [you were/he was/she was] 17 years old, did [you/he/she] have any of the following childhood diseases: Asthma?
(Before [you were/he was/she was] 17 years old, did [you/he/she] have…)

H33. Diabetes?

H34. A respiratory disorder such as bronchitis, wheezing, hay fever, shortness of breath, or sinus infection?

H35. A speech impairment?

H36. An allergic condition?

H37. Heart trouble?

H38. Chronic ear problems or infections?

1. YES  5. NO
Before [you were/he was/she was] 17 years old, did [you/he/she] have any of the following childhood diseases:
Epilepsy or seizures?

[Before [you were/he was/she was] 17 years old, did [you/he/she] have…]

Severe headaches or migraines?

Stomach problems?

High blood pressure?

Depression?

Drug or alcohol problems?

Any other emotional or psychological problems?

1. YES  5. NO

H46 CHECKPOINT – WHETHER ANY CHILDHOOD HEALTH CONDITIONS

AT LEAST ONE HEALTH CONDITION ENDORSED AT H32 - H45

NO HEALTH CONDITIONS ENDORSED

1. HEAD HAD INTEREST  GO TO H47 CHECKPOINT

INTRO. We’d like to know more about how old [you were/Spouse was/Head was/Wife was/"Wife" was] when [you/he/she] had any of the health condition(s) we just talked about. To help you remember, I want to first ask you about some things that may have happened in [your/his/her] childhood, that is, before [you were/he was/she was] 17 years old.

☐ If [your/Spouse’s] parents or guardians separated during [your/his/her] childhood, please tell me how old [you were/he was/she was] at the time of each separation, starting with the first time they separated. (Any other separations?)

☐ If [you/Spouse] moved during [your/his/her] childhood, please tell me how old [you were/he was/she was] at the time of each move, starting with the first move. (Any other moves?)

☐ At what age did [you/Spouse] first start going to school? If [you/he/she] changed schools during [your/his/her] childhood, please tell me how old [you were/he was/she was] each time, starting with the first time. (Any other school changes?)

ASK THE FOLLOWING FOR EACH HEALTH CONDITION ENDORSED

☐ At what age [were you/was Spouse] first diagnosed with [Health condition]? Until what age did [you/he/she] have it?

PROBE: ‘If you don’t know the exact age, please give us your best guess.’

PROBE FOR AGE USING LANDMARKS, STARTING WITH THE EARLIEST LANDMARK

IF R SAYS ‘Still have it’ or “Older than 16”, CLICK “17+” AND ENTER AGE

Health condition TEXT FILLS: asthma; diabetes; a respiratory disorder such as bronchitis, wheezing, hay fever, shortness of breath, or sinus infection; a speech impairment; an allergic condition; heart trouble; chronic ear problems or infections; epilepsy or seizures; severe headaches or migraines; stomach problems; high blood pressure; depression; drug or alcohol problems; [if Depression=Yes: any other] emotional or psychological problems

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Respiratory Disorder
Speech Impairment
Allergic Condition
Heart Trouble
Chronic Ear Problems / Infections
Epilepsy or Seizures
Severe Headaches / Migraines
Stomach Problems
High Blood Pressure
Depression
Drug / Alcohol Problems
Emotional / Psychological Problems

**CALENDAR HARD CHECK FOR CALENDAR="COMPLETE" BUT NOT ALL AGE DATA ENTERED**

*AGE IS MISSING FOR ONE OR MORE HEALTH CONDITIONS*

IWER: AGE has not been entered for one or more of the health conditions listed on the calendar. Please confirm with R. If R cannot give an age for a certain condition, select one of the DK options for that condition.

**H47 CHECKPOINT – WHETHER SPOUSE OF RESP IN FU**

- SPOUSE OF RESPONDENT IN FU
- ALL OTHERS

ASK H25 – H45 & CALENDAR FOR SPOUSE, THEN GO TO H48 CHECKPOINT

**H48 INTERVIEWER CHECKPOINT - WHETHER OFUMS IN THE FU**

1. OFUM IN THE FU
   [CYFUHU=1, 4 AND CYRTH GT222]
5. ALL OTHERS

GO TO H58 CHECKPOINT

**H49.** Now about the rest of your family living there--are any family members in poor health?

1. YES
5. NO

GO TO H58 CHECKPOINT

**H50.** Who is that?
(CYAQSN LIST; DISPLAY NAME, RTH, FUHU)

ENTER all that apply

01-24. LIST OF FU MEMBERS LIVING IN FU 2007 (OTHER THAN HEAD/WIFE/"WIFE")
H59. Now, I am going to ask you [RESPONDENT] some questions about feelings you may have had over the PAST 30 days. Please answer using one of the following choices: All of the time, most of the time, some of the time, a little of the time, none of the time. In the past 30 days, about how often did you feel...

H59a. So sad nothing could cheer you up? Would you say all of the time, most of the time, some of the time, a little of the time, or none of the time?

H59b. Nervous?
H59c. Restless or fidgety?
H59d. Hopeless?
H59e. That everything was an effort?
H59f. Worthless?

(Would you say all of the time, most of the time, some of the time, a little of the time, or none of the time?)

H59g. Thinking about the feelings I just asked you about, altogether, did these feelings occur more often in the past 30 days than is usual for you, less often than is usual, or about the same as usual?

H59h. Was that a lot more, somewhat, or only a little more often than usual?

H59i. Was that a lot less, somewhat, or only a little less often than usual?

H59j. How much do these feelings usually interfere with your life or activities -- a lot, some, a little, or not at all?

H59k. During the past 30 days, how many days out of 30 were you totally unable to work or carry out your normal activities because of these feelings?

H59l. [Aside from [that day/those (H59K) days], how many of the remaining days/How many days] out of the past 30 were you able to work but had to cut down on what you did because of these feelings?
H60. In 2005 or 2006, was anyone in the family covered by health insurance or some other kind of health care plan? (Including health insurance obtained through employment or purchased directly as well as government programs like Medicare and Medicaid that provide medical care or help pay medical bills.)

1. YES  5. NO  ➤ GO TO H64

H60a. Who was covered?
(CYAQSN LIST; DISPLAY NAME, RTH, FUHU)

ENTER all that apply

01-24. LIST OF ALL FU MEMBERS LIVING IN FU FROM ANY YEAR 2005-2007

ASK H61-H61c FOR EACH PERSON SELECTED AT H60a

H61. What type of health insurance plan or health insurance coverage did [you/NAME] have in 2005 and 2006? Was it through an employer, private insurance, Medicare, Medi-gap or what? Please tell me about ALL the plans or coverage [you/he/she] had in 2005 and 2006.

IF DK: Was it employer provided, private, Medicare, Medi-gap, Medicaid or a state program, military provided such as Tricare, ChampUS or ChampVA, Indian health insurance, another state-sponsored plan, another government-sponsored plan, or some other plan?

PROBE: Any other plan or coverage?
PROBE: Please tell me about all plans or coverage that [you/he/she] had in 2005 and 2006.

1. EMPLOYER PROVIDED HEALTH INSURANCE
2. PRIVATE HEALTH INSURANCE PURCHASED
3. MEDICARE
4. MEDI-GAP/SUPPLEMENTAL
5. MEDICAID/ MEDICAL ASSISTANCE STATE PROGRAM NAME
6. MILITARY HEALTH CARE/TRICARE (ACTIVE DUTY)
7. TRICARE/CHAMPUS/CHAMPVA (DEPENDENTS, VETERANS)
8. INDIAN HEALTH INSURANCE
9. OTHER STATE-SPONSORED PLAN (NOT MEDICAID)
10. OTHER GOVERNMENT PROGRAM
97. OTHER (SPECIFY)

GO TO H61B

H61Spec. Could you tell me a little more about that other (plan/program)? [STRING 100]

IF H60a PERSON IS LESS THAN 18 YEARS OLD THEN ASK H61a
ELSE GO TO H61b

H61a. IWER: Is that [SCHIPName], the state health insurance plan for uninsured children?

ENTER Yes or No; ASK R only if you are unclear about the answer
1. YES
5. NO

H61b. For how many months in 2005 (were you/ was he/she) covered?

H61c. For how many months in 2006 (were you/ was he/she) covered?

GO TO H62
H62 CAI CHECKPOINT - SEE DERESPONDENT & MEDICARENUM, WHO IS RESPONDENT AND WHETHER COVERED BY MEDICARE

RESPONDENT IS HEAD OR WIFE/“WIFE” AND (IS 65 YEARS OLD OR OLDER OR IS COVERED BY MEDICARE H61 = 3) AND HAS NOT GIVEN US MEDICARE# IN ANY PREVIOUS WAVE (MEDICARENUM = 0)

ALL OTHERS → GO TO H63

H62a. We would like to understand how people’s medical history affects their financial status, and how use of health care may change as people age. To do that, we need to obtain information about health care costs and diagnoses for statistical purposes. The best place to get this information without taking up a lot more of your time is in the Medicare files.

Could you give me your Medicare number for this purpose? (Under the Privacy Act of 1974, providing your number is a voluntary decision. The benefits you may be receiving under this program will not be affected in any way by your decision.)

1. YES  5. NO → GO TO H63

H62b. Is that a Medicare Claim number or a Railroad Retirement Board number?

1. MEDICARE → H62c. What is that number?

GO TO H63

2. RAILROAD → H62d. Is that a 9-digit or 6-digit number?

1. NINE → H62e. What is that number?

2. SIX → H62f. What is that number?
H63. These next questions are about health care expenditures that you [and your family] may have had during 2005 and 2006. When I refer to "you" or "you and your family" I mean you and the persons living with you as family during 2005 and 2006. Altogether, how much were the health insurance premiums that (you/you and your family) paid in 2005 and 2006 combined for (all of) the health insurance or health care coverage(s) you just mentioned? Please only include amounts that you and your family paid, either directly or through automatic deductions from pay; do not include amounts paid by someone outside of your family.

$ 6 DIGITS
GO TO H64

H63A. Were they $2,400 or more?

1. YES
5. NO
8. DON'T KNOW
9. REFUSED

GO TO H64

H63B. $5,000 or more?

1. YES
5. NO

GO TO H64

H63C. $1,000 or more?

1. YES
5. NO

GO TO H64

H64. [IF H63 NOT ASKED: These next questions are about health care expenditures that you [and your family] may have had during 2005 and 2006. When I refer to "you" or "you and your family" I mean you and the persons living with you as family during 2005 and 2006.]

About how much did (you/you and your family) pay out-of-pocket for nursing home and hospital bills in 2005 and 2006 combined?

$ 6 DIGITS
GO TO H70

H65. Would it amount to $10,000 or more?

1. YES
5. NO
8. DON'T KNOW
9. REFUSED

GO TO H70

H66. $20,000 or more?

1. YES
5. NO

GO TO H70

H67. $50,000 or more?

1. YES
5. NO

GO TO H70

H68. $5,000 or more?

1. YES
5. NO

GO TO H70

H69. $500 or more?

1. YES
5. NO

GO TO H70
H70. About how much did [you/you and your family] pay out-of-pocket for doctor, outpatient surgery, and dental bills in 2005 and 2006 combined?

$6 DIGITS
DON'T KNOW  REFUSED

GO TO H76

H71. Would it amount to $1,000 or more?

1. YES  5. NO  8. DON'T KNOW  9. REFUSED

GO TO H76

H72. $5,000 or more?

1. YES  5. NO

GO TO H76

H73. $20,000 or more?

1. YES  5. NO

GO TO H76

H74. $500 or more?

1. YES  5. NO  DK/RF

GO TO H76

H75. $200 or more?

1. YES  5. NO

GO TO H76

H76. About how much did [you/you and your family] pay out-of-pocket for prescriptions, in-home medical care, special facilities, and other services in 2005 and 2006 combined?

$6 DIGITS
DON'T KNOW  REFUSED

GO TO H82

H77. Would it amount to $5,000 or more?

1. YES  5. NO  8. DON'T KNOW  9. REFUSED

GO TO H82

H78. $10,000 or more?

1. YES  5. NO

GO TO H82

H79. $20,000 or more?

1. YES  5. NO

GO TO H82

H80. $1,000 or more?

1. YES  5. NO  DK/RF

GO TO H82

H81. $500 or more?

1. YES  5. NO

GO TO H82
H82. Could you give me your best estimate of the total cost of all medical care for [you/ you and your family living there] in 2005 and 2006 combined? That is, the total of your out-of-pocket costs you just gave me, plus the costs covered by Medicare, Medicaid, or other health insurance?

IF NECESSARY: The costs we talked about were for hospital and nursing home stays, doctor and clinic visits, outpatient surgery, dental visits, prescriptions, and in-home medical care.

$6 DIGITS
GO TO SECTION J

H83. Would it amount to $25,000 or more?

1. YES
5. NO
8. DON'T KNOW
9. REFUSED
GO TO SECTION J

H84. $100,000 or more?

1. YES
5. NO
GO TO SECTION J

H85. $500,000 or more?

1. YES
5. NO

H86. $5,000 or more?

1. YES
5. NO
DK/RF
GO TO SECTION J

H87. $1,000 or more?

1. YES
5. NO
GO TO SECTION J
SECTION J: MARRIAGE AND CHILDREN

THE BIG TRICK IN SECTION J IS TO PROPERLY IDENTIFY PEOPLE WHOSE MARRIAGE AND KID HISTORIES SHOULD BE ASKED. THE CHECKPOINT BELOW IDENTIFIES THREE TYPES OF INDIVIDUALS WHO QUALIFY FOR AT LEAST SOME QUESTIONS IN SECTION J.

THERE ARE TWO MAJOR COMPLICATIONS IN SECTION J. ONE IS THE CONCEPT OF UPDATES VS. FULL SHOTS. HEADS/WIVES/"WIVES" WHO WERE HEADS/WIVES/"WIVES" LAST YEAR ARE ASKED UPDATES ABOUT THE "PROGRESS" OF THEIR MARRIAGES AND BIRTHS/ADOPTIONS OF ADDITIONAL KIDS. THE CONCEPT OF H/W/"W" THIS YEAR AND LAST INCLUDES LAST YEAR'S WIFE WHO IS NOW A SINGLE FEMALE HEAD, A "WIFE" WHO MARRIES THE HEAD AND BECOMES A LEGAL WIFE, A HEAD WHO SPLITS OFF FROM A WIFE, ETC. THE POINT IS THAT THIS CURRENT HEAD/WIFE/"WIFE" WAS IN A RESPONSE FU IN THE LAST WAVE--HAVING BEEN IN AN INSTITUTION DOESN'T COUNT--WITH ONE OF THOSE THREE RTH'S.

FULL SHOTS ARE ASKED ABOUT PEOPLE WHO ARE NEW TO HEAD-, WIFE-, OR "WIFE"-HOOD AND ARE ALSO ASKED FOR OFUMS.

THE SECOND MAJOR COMPLICATION CENTERS AROUND WHAT'S ASKED OF A STABLY AND LEGALLY MARRIED, CORESIDENT COUPLE WHO WAS RESPONSE IN THE PRIOR WAVE. THE COUPLE IS NOT ASKED ANY MARRIAGE INFORMATION BUT IS ASKED KID UPDATE INFO AS A UNIT ("you and your wife"). THIS IS A SPECIALIZED SUBSET OF THOSE WHO FIT INTO COMPLICATION #1 ABOVE.

FURTHER BUT COMPARATIVELY MINOR ADJUSTMENTS FOR ASKING FAMILY HISTORY ARE MADE BASED ON GENDER AND AGE. ONLY THOSE OFUMS AGED 12-44 GET SECTION J, AND FEMALE HEADS/WIVES/"WIVES" WHO QUALIFY FOR UPDATES ARE ASKED ABOUT KIDS ONLY IF THEY ARE AGED 44 OR UNDER.

SECTION J SHOULD BE ASKED IN THIS ORDER: FIRST FOR HEAD, THEN FOR WIFE/"WIFE", AND LAST FOR EACH QUALIFYING OFUM.

2007: J1. CAI CHECKPOINT (VARNAME=J1CKPT) - SEE FU LISTING--SECTION J QUALIFIER

GROUP ONE

SAME HEAD + WIFE AS LAST WAVE
IWTYPE [CCS] = 1, 2 AND FU HAS AT LEAST 2 PEOPLE, BOTH WITH PYFUHU=1 AND CYFUHU=1, 4.
ONE OF THESE PEOPLE HAS CYAQRTH=PYAQRTH=101, OTHER HAS CYAQRTH=PYAQRTH=202.

TYPE A PERSONS CYAQRTH=202 AND CYAGE = 12 - 44
GO TO KIDS BLOCK FOR HEAD + WIFE AS A UNIT

TYPE A NoJ PERSONS CYAQRTH=202 AND CYAGE NE 12 - 44
DO NOT ASK SECTION J; DO NOT GO INTO GROUP TWO

GROUP TWO

HD/W/"W" WAS HD/W/ "W" IN ANY COMBINATION LAST WAVE
IWTYPE [CCS] = 1, 2 AND (H/W/"W" & PYFUHU=INST) OR (OFUM CYAQRTH GT 222) OR (NEW H/W/"W" PYAQRTH NE 101-222 & CYAQRTH =101-222);
IWTYPE [CCS] =3, 4

 TYPE CNoJ PERSONS OFUM (CYAQRTH GT 222) AND CYAGE NE 12 - 44
DO NOT ASK SECTION J

ALL OTHERS
IWTYPE [CCS] =1, 2 AND (H/W/"W" & PYFUHU=INST) OR (OFUM CYAQRTH GT 222) OR (NEW H/W/"W" PYAQRTH NE 101-222 & CYAQRTH =101-222);
IWTYPE [CCS] =3, 4

TYPE =NULL CYFUHU=6-12
DO NOT ASK SECTION J

GROUP THREE

TYPE B PERSONS
GO TO MARRUPDATE & KIDS BLOCKS

TYPE CNoJ PERSONS OFUM (CYAQRTH GT 222) AND CYAGE NE 12 - 44
DO NOT ASK SECTION J

TYPE C1 & C2 PERSONS
ALL OTHERS, INCL. OFUM CYAQRTH=12-44, H/W/"W" PY INST, NEW H/W/"W", AND RECONs
GO TO ALLMARS & KIDS BLOCKS
J1a.  [FOR VERY FIRST ITERATION THROUGH SECTION J: Now I have some questions about marriage and children.]

MARRUPDATE BLOCK:

J2.  AQSN OF THIS PERSON

J3.  CAI CHECKPOINT (VARNAME=J3CKPT)

SEE FU LISTING--MARITAL STATUS

- WIDOWED
- SEPARATED OR MARRIED AND CYAQRTH=222
- DIVORCED, MARRIAGE ANNULLED
- MARRIED AND CYAQRTH NE 222
- NEVER MARRIED

GO TO J6  GO TO J5  GO TO J7  GO TO KIDS

J4.  In what month and year [were you/was your "WIFE"] widowed?
(2 VARS:  J4MO, WITH TMONTH, AND J4YR, WITH TYEARSPECCY)

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GO TO J7  GO TO J7  GO TO KIDS

J5.  In what month and year did [your/your "WIFE's"] [divorce/annulment] become final?
(2 VARS:  J5MO, WITH TMONTH, AND J5YR, WITH TYEARSPECCY)

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GO TO KIDS

J6.  In what month and year did [you and your [husband/wife]/your "WIFE" and her husband] stop living together?
(2 VARS:  J6MO, WITH TMONTH, AND J6YR, WITH TYEARSPECCY)

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GO TO KIDS

J7.  [WORDING FOR HEAD IF NO WIFE IN FU: In what month and year did you last get married? / WORDING FOR HEAD IF WIFE IN FU: In what month and year did [you and your wife] [last] get married? / WORDING FOR WIFE: Please tell me again, in what month and year did you and your wife get married?]
(2 VARS:  J7MO, WITH TMONTH, AND J7YR, WITH TYEARSPECCY)

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GO TO KIDS

J8.  [IF NOT CLEAR: What was [your [husband's/wife's]/her husband's] name?]
(25-CHARACTER VARIABLE)

Accept any name--DO NOT PROBE.
J9. Before that, (were you/was she) widowed, divorced, or had (you/she) never been married?

3. WIDOWED

4. DIVORCED, MARRIAGE ANNULLED

2. NEVER MARRIED

7. OTHER (SPECIFY)

GO TO KIDS

J10. In what month and year (were you/was she) widowed?

(TWO VARS: J10MO USING MONTH AND J10YR USING YEARSPECCY BUT NO CONTINGENCIES)

GO TO KIDS

J11. In what month and year did (your/her) (divorce/annulment) become final?

(TWO VARS: J11MO USING TMONTH AND J11YR USING TYEARSPECCY BUT NO CONTINGENCIES)

GO TO KIDS

J12. In what month and year did (you/they) stop living together?

(TWO VARS: J12MO USING TMONTH AND J12YR USING TYEARSPECCY BUT NO CONTINGENCIES)

GO TO KIDS

END MARRUPDATE BLOCK
ALLMARRS BLOCK:

J12a.  AQSN OF THIS PERSON

J13.  CAI CHECKPOINT (VARNAME=J13CKPT)

SEE FU LISTING--MARITAL STATUS

NEVER BEEN MARRIED

GO TO KIDS BLOCK

ALL OTHERS

J14.  [FOR VERY FIRST ITERATION THROUGH SECTION J: Now I'd like to ask about [your/NAME's] family history.]

[FOR 1st OFUM IN SECTION J: Now let's talk about the other members of your family.]

Altogether, how many times [have you/has NAME] been married? (TWO DIGITS)

1.  ONCE

GO TO J21

OTHER (SPECIFY)

J15.  In what month and year did [you/he/she] get married for the first time?

(J15MO=TMONTH, J15YR=TYEARSPECCY)

J16.  What was [your/his/her] first [husband's/wife's] name? (25-CHARACTER VAR)

Accept any name—DO NOT PROBE

J17.  Did that marriage end in widowhood, divorce, or what?

3.  WIDOWHOOD

4.  DIVORCE, ANNULMENT

7.  OTHER (SPECIFY)

J18.  In what month and year [were you/was he/she] widowed?

(J18MO=TMONTH; J18YR=TYEARSPECCY)

J19.  In what month and year did [your/his/her] [divorce/annulment] become final?

(J19MO=TMONTH; J19YR=TYEARSPECCY)

J20.  In what month and year did [you/they] stop living together?

(J20MO=TMONTH, J20YR=TYEARSPECCY)

J21.  In what month and year did [you/he/she] (last) get married?

(J21MO=TMONTH, J21YR=TYEARSPECCY)

J22.  What [was/is] [your [husband's/wife's]/his wife's/her husband's] name? (25-CHARACTER VAR)

Accept any name—DO NOT PROBE

J23.  CAI CHECKPOINT (VARNAME=J23CKPT)

SEE FU LISTING--MARITAL STATUS

WIDOWED

SEPARATED OR MARRIED AND CYAQRTH=222

DIVORCED, MARRIAGE ANNULLED

MARRIED AND CYAQRTH NE 222

GO TO J26

GO TO KIDS

J24.  In what month and year [were you/was he/she] widowed?

(J24MO=TMONTH; J24YR=TYEARSPECCY)

GO TO KIDS

J25.  In what month and year did [your/his/her] [divorce/annulment] become final?

(J25MO=TMONTH; J25YR=TYEARSPECCY)

J26.  In what month and year did [you/they] stop living together?

(J26MO=TMONTH, J26YR=TYEARSPECCY)

END ALLMARRS BLOCK
J27. CAI CHECKPOINT (VARNAME=J27CKPT)

SEE J1 CHECKPOINT

TYPE A PAIR OF PEOPLE

TYPE B PERSON

TYPE C PERSON

GO TO J30

THIS PERSON IS MALE

THIS PERSON IS FEMALE

UNDER AGE 45

AGE 45 OR OLDER

NO MORE SECTION J FOR THIS PERSON

J28. We are updating the information we collected last year.

Have [you and your wife had/you fathered/you given birth to] any children since January 2005?

Do not count stillbirths, stepchildren, or adopted children

1. YES

5. NO

GO TO J32

J29. How many is that? (Since January 2005?)

(SKIP J30; REPLY GOES IN ANSWER TO J29/J30

J30. [FOR 1st OFUM IN SECTION J, IF NEVER MARRIED: Now let's talk about the other members of your family.]

(Now, we would like to ask about births of children.)

How many children [have you ever fathered/ have you yourself ever given birth to/has NAME ever fathered/has NAME ever given birth to]?

Do not count stillbirths, stepchildren, or adopted children

ANSWER TO J29/J30: (TWO DIGITS, RANGE=1-20)

0. NONE

GO TO J32

J31. What is the [first/next] child's name?

(MULTIMENTION 25-CHARACTER VARIABLE; COLLECT NAMES OF ALL OWN KIDS, THEN ASK OS1-OS9 FOR EACH.)
OS1. Let's talk about [NAME OF CHILD]. (We can't always tell from a name. Is that a male or a female?)

1. MALE
2. FEMALE

OS2. In what month and year was [he/she] born?

(2 VARS: OS2MO WITH TMONTH CODE AND OS2YR WITH TYEARSPECCY CODE)


GO TO OS4

OS3. How much did [he/she] weigh at birth?

(2 2-DIGIT VARS: OS3LBS AND OS30Z)

OS4. Where was [he/she] born?

(TWO 25-CHARACTER VARS: OS4TOWN FOR TOWN/CITY AND OS4COUNTRY FOR FOREIGN COUNTRY; ALSO ONE 2-DIGIT VARIABLE, OS4STATE FOR STATE IN US. USE TSTATE, MINUS CODE 55)

OS5. Is [NAME OF CHILD] living with you now, away with [his/her] [father/mother], with some other relative, [has he/she set up a separate household], or what?

1. LIVING IN FU/HU NOW
2. LIVING WITH FATHER
3. LIVING WITH MOTHER
4. LIVING WITH OTHER RELATIVE
5. SET UP A SEPARATE HOUSEHOLD
6. DECEASED
GO TO OS7
7. OTHER (SPECIFY)

OS6. In what month and year did [he/she] die?

(TWO VARS OS6MO =TMONTH; OS6YR=TYEARSPECCY)

GO TO OS10

OS7. 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 [his/her] background. Is [he/she] Spanish, Hispanic, or Latino? That is, Mexican, Mexican American, Chicano, Puerto Rican, Cuban, or other Spanish?

1. MEXICAN
2. MEXICAN AMERICAN
3. CHICANO
4. PUERTO RICAN
5. CUBAN
7. OTHER (SPECIFY)
0. IS NOT SPANISH/HISPANIC

OS8. What is [his/her] race? Is [he/she] white, black, American Indian, Alaska Native, Asian, Native Hawaiian or Other Pacific Islander?

ENTER all that apply

1. WHITE
2. BLACK
3. AMERICAN INDIAN OR ALASKA NATIVE
4. ASIAN
5. NATIVE HAWAIIAN OR PACIFIC ISLANDER
7. SOME OTHER RACE (SPECIFY)

OS9. What is [his/her] ancestry or ethnic origin? (OPENEND)

IF NECESSARY: From what country or part of the world did (his/her) ancestors come from? Is there a second? (What is it?)

OS10. CAI CHECKPOINT (VARNAMe=OS10CKPT)

SEE J29/J30--NUMBER OF CHILDREN

A. ANOTHER CHILD LISTED
ASK OS1-OS9 AGAIN

B. NO MORE CHILDREN LISTED
GO TO J32
ADOPTED KIDS

J32. CAI CHECKPOINT (VARNAME=J32CKPT)

SEE J1 CHECKPOINT

TYPE A PAIR OF PEOPLE

TYPE B PERSON (ONLY MALES AND AGE-QUALIFIED FEMALES GET HERE, SO NO NEED FOR CHECKPOINT BRANCHING LIKE THAT AT J27)

TYPE C PERSON IS:

H/W/"W" (CYAQRTH LE 222)

OFUM (CYAQRTH GE 222)

NO MORE SECTION J FOR THIS PERSON

J33. [Have you or your wife/ Have you/ Has [your wife/"WIFE"] legally adopted any children since January 2005?

J34. [Have you/Has NAME] ever legally adopted any children?

ANSWER TO J33/J34:

1. YES 5. NO NO MORE SECTION J FOR THIS PERSON

J35. [TYPE A OR B: How many is that? / TYPE C: How many altogether?]

(2-DIGIT VARIABLE; RANGE 1-15)

J36. What is the [first/next] child's name?

(MULTIMENTION 25-CHARACTER VARIABLE; COLLECT NAMES OF ALL OWN KIDS, THEN ASK AS1-AS9 FOR EACH.)
AS1. Let's talk about [NAME OF CHILD]. (We can't always tell from a name. Is that a male or a female?)

1. MALE
2. FEMALE

AS2. In what month and year was [he/she] born?
(2 VARS: AS2MO WITH TMONTH CODE AND AS2YR WITH TYEARSPECCY CODE.)

|--------|------|------|------|-------------|--------------------------|--------------------------------------------|

AS3. What was [his/her] relationship to [you/your wife/your "WIFE"] before the adoption?
(CODE IS SIMILAR TO BUT NOT IDENTICAL WITH REGULAR RTH CODE, SO IS SHOWN BELOW)

96 NONE
301 SON
302 DAUGHTER
331 STEPSON
332 STEPDAUGHTER
381 FOSTER SON
382 FOSTER DAUGHTER
401 BROTHER
402 SISTER
471 BROTHER-IN-LAW
472 SISTER-IN-LAW
481 BRO OF COHABITR
482 SIS OF COHABITR
601 GRANDSON
602 GRANDDAUGHTER
651 GREAT GRANDSON
652 GREAT GRANDDAU
701 NEPHEW OF HEAD
702 NIECE OF HEAD
711 NEPHEW OF SPOUSE
712 NIECE OF SPOUSE
740 COUSIN
750 COUSIN OF SPOUSE
831 SON OF BF/GF
832 DAUGHTR OF BF/GF
950 OTHER RELATIVE
960 REL OF SPOUSE
970 REL OF COHABITER

AS4. Where was [he/she] born?
(TWO 25-CHARACTER VARS: AS4TOWN FOR TOWN/CITY AND AS4COUNTRY FOR FOREIGN COUNTRY; ALSO ONE 2-DIGIT VARIABLE, AS4STATE FOR STATE IN US. USE TSTATE CODE, MINUS CODE 55)
AS5. Is [NAME OF CHILD] living with you [HEAD] now, away with [his/her] [father/mother], with some other relative, [has he/she set up a separate household], or what?

- 1. LIVING IN FU/HU NOW
- 2. LIVING WITH FATHER
- 3. LIVING WITH MOTHER
- 4. LIVING WITH OTHER RELATIVE
- 5. SET UP A SEPARATE HOUSEHOLD

GO TO AS7

- 6. DECEASED

OS6. In what month and year did [he/she] die?
(TWO VARS OS6MO=TMONTH; OS6YR=TYEARSPECCY)

GO TO AS10

AS7. 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 [his/her] background. Is [he/she] Spanish, Hispanic, or Latino? That is, Mexican, Mexican American, Chicano, Puerto Rican, Cuban, or other Spanish?

- 1. MEXICAN
- 2. MEXICAN AMERICAN
- 3. CHICANO
- 4. PUERTO RICAN
- 5. CUBAN
- 7. OTHER (SPECIFY)
- 0. IS NOT SPANISH/ HISPANIC

AS8. What is [his/her] race? Is [he/she] white, black, American Indian, Alaska Native, Asian, Native Hawaiian or Other Pacific Islander?
ENTER all that apply

- 1. WHITE
- 2. BLACK
- 3. AMERICAN INDIAN OR ALASKA NATIVE
- 4. ASIAN
- 5. NATIVE HAWAIIAN OR PACIFIC ISLANDER
- 0. IS NOT

AS9. What is [his/her] ancestry or ethnic origin? (OPENEND)

IF NECESSARY: From what country or part of the world did [his/her] ancestors come from? Is there a second? (What is it?)

AS10. CAI CHECKPOINT (VARNAME=AS10CKPT)

SEE J35--NUMBER OF ADOPTED CHILDREN

- A. ANOTHER CHILD LISTED
  ASK AS1-AS9 AGAIN
- B. NO MORE CHILDREN LISTED
  NO MORE SECTION J FOR THIS PERSON
SECTION KL: BACKGROUND AND EDUCATION OF NEW HEAD AND NEW WIFE/"WIFE"

ASKED ABOUT WIFE/"WIFE" FIRST, THEN HEAD

KL1. CAl CHECKPOINT (VARNAMe=Kl1CKPT)

SEE FU LISTING

1. NEW WIfE/"WIFE" IN FU
   CCS=1 AND ((CYFUHU=1 AND CYAQRTH=202, 222 AND PYAQRTH NE 202, 222) OR (CYFUHU=4 AND CYAQRTH=202, 222)) OR
   CCS=2, 3 AND (CYFUHU=1, 4 AND CYAQRTH=202, 222)

3. NEW HEAD IN FU
5. ALL OTHERS

GO TO SECTION M

GO KL1@END

KL2. Now I have some questions about [your/her/his] family and past experiences. Where was [your/her/his] father born?
   (TWO 25-CHARACTER VARS: KL2TOWN FOR TOWN/CITY AND KL2COUNTRY FOR FOREIGN COUNTRY;
   ALSO ONE 2-DIGIT VARIABLE, KL2STATE FOR STATE IN US (USE TSTATE CODE, MINUS CODE 55))

Accept father substitute

KL3. Where did [your/her/his] father grow up?
   (TWO 25-CHARACTER VARS: KL3TOWN FOR TOWN/CITY AND KL3COUNTRY FOR FOREIGN COUNTRY;
   ALSO ONE 2-DIGIT VARIABLE, KL3STATE FOR STATE IN US (USE TSTATE CODE, MINUS CODE 55))

   Most of the years from ages 6 to 16

KL4. Where did [your/her/his] father receive his education--in the United States, outside the United States, or both?

1. UNITED STATES ONLY
2. OUTSIDE U.S. ONLY
3. BOTH IN U.S. AND OUTSIDE
8. DK
5. HAD NO EDUCATION
9. NA, RF

GO TO KL7

GO TO KL10

KL5. How much education did [your/her/his] father complete (in the United States)?

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

GO TO KL7

GO TO KL7

KL6. Could he read and write (in English)?

1. YES
5. NO
SOFT CHECK FOR KL5 = DK/NA
What's your best estimate, would you say… Read list.
1. 0-5 GRADES,
2. 6-8 GRADES,
3. 9-11 GRADES,
4. 12 GRADES,
5. 12 GRADES PLUS NON-ACADEMIC TRAINING,
6. 13-14 YEARS OR AN ASSOCIATE'S DEGREE,
7. 15-16 YEARS OR A BACHELOR'S DEGREE, OR
8. 17 OR MORE YEARS - A GRADUATE DEGREE, PH.D., OR PROFESSIONAL DEGREE?
(DK/RF (DO NOT READ))

KL7. CAI CHECKPOINT (VARNAME=KL7CKPT)

SEE KL4--EDUCATION OUTSIDE U.S.

1. OUTSIDE US ONLY OR BOTH IN U.S. AND OUTSIDE
2. ALL OTHERS

GO TO KL10

KL8. How many years of school did he complete outside of the U.S.?
(2-DIGIT: ACTUAL NUMBER OF YEARS; 98=DK; 99=NA)

KL9. What was the highest degree or certificate he earned outside the U.S.?
(OPENEND)

KL10. What was [your/her/his] father's usual occupation when [you were/she/he was] growing up? What kind of work did he do? What were [your/her/his] most important activities or duties?
(OPENEND)

KL11. What kind of business or industry was that in?
(OPENEND)

KL12. These next questions are about [your/your wife's/WIFE's/HEAD's] mother. Where was [your/her/his] mother born?
(TWO 25-CHARACTER VARS: KL12TOWN FOR TOWN/CITY AND KL12COUNTRY FOR FOREIGN COUNTRY; ALSO ONE 2-DIGIT VARIABLE, KL12STATE FOR STATE IN US (USE TSTATE CODE, MINUS CODE 55))
Accept mother substitute

KL13. Where did [your/her/his] mother grow up?
(TWO 25-CHARACTER VARS: KL13TOWN FOR TOWN/CITY AND KL13COUNTRY FOR FOREIGN COUNTRY; ALSO ONE 2-DIGIT VARIABLE, KL13STATE FOR STATE IN US (USE TSTATE CODE, MINUS CODE 55))
Most of the years from ages 6 to 16
KL14. Where did [your/her/his] mother receive her education—in the United States, outside the United States, or both?

1. UNITED STATES ONLY
2. OUTSIDE U.S. ONLY
3. BOTH IN U.S. AND OUTSIDE
4. 8. DK
5. 5. HAD NO EDUCATION
6. 9. NA, RF

GO TO KL17

GO TO KL20

KL15. How much education did [your/her/his] mother complete (in the United States)?

1. 1. 0-5 GRADES
2. 2. 6-8 GRADES; "GRADE SCHOOL"
3. 3. 9-11 GRADES; "JUNIOR HIGH"
4. 4. 12 GRADES; "HIGH SCHOOL"
5. 5. 12 GRADES PLUS NON-ACADEMIC TRAINING
6. 6. 13-14 YEARS; SOME COLLEGE; ASSOCIATE'S DEGREE
7. 7. 15-16 YEARS; COLLEGE; BACHELOR'S DEGREE
8. 8. 17 OR MORE YEARS; COLLEGE, GRADUATE WORK; PH.D.; PROFESSIONAL DEGREE

GO TO KL17

GO TO KL17

KL6. Could she read and write (in English)?

1. YES
5. NO

KL17. CAI CHECKPOINT (VARNAME=KL17CKPT)

SEE KL14--EDUCATION OUTSIDE U.S.

1. OUTSIDE US ONLY OR BOTH IN U.S. AND OUTSIDE

ALL OTHERS

GO TO KL20

KL18. How many years of school did she complete outside of the U.S.?

(2-DIGIT: ACTUAL NUMBER OF YEARS; 98=DK; 99=NA)

KL19. What was the highest degree or certificate she earned outside the U.S.? (OPENEND)

KL20. What was [your/your wife's/"WIFE's"/HEAD's] mother's usual occupation when (you were/your wife/"WIFE"/HEAD was] growing up? What kind of work did she do? What were her most important activities or duties? (OPENEND)

KL21. What kind of business or industry was that in? (OPENEND)
KL22. Now I have some questions about brothers and sisters. Did [you/your wife/"WIFE"/HEAD] have any brothers?  
Include natural siblings only

<table>
<thead>
<tr>
<th>1. YES</th>
<th>5. NO</th>
<th>GO TO KL28</th>
</tr>
</thead>
</table>

KL23. How many brothers was that?  
(TWO DIGITS: RANGE=1-25)

<table>
<thead>
<tr>
<th>NUMBER</th>
<th></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th></th>
<th>1. YES</th>
<th>5. NO</th>
<th>GO TO KL28</th>
</tr>
</thead>
</table>

KL24. Is he still living?  

<table>
<thead>
<tr>
<th>1. YES</th>
<th>5. NO</th>
</tr>
</thead>
</table>

KL25. [Is/Was] he older than [you/your wife/"WIFE"/HEAD]?  

<table>
<thead>
<tr>
<th>1. YES</th>
<th>5. NO</th>
</tr>
</thead>
</table>

GO TO KL28

KL26. How many of them are still living?  

<table>
<thead>
<tr>
<th>96. ALL</th>
<th>OTHER # (1-25)</th>
<th>00. NONE</th>
</tr>
</thead>
</table>

KL27. [Are/Were] any of [your/her/his] brothers older than [you/she is/he is]  

<table>
<thead>
<tr>
<th>1. YES</th>
<th>5. NO</th>
</tr>
</thead>
</table>

GO TO KL28

KL28. Did [you/your wife/"WIFE"/HEAD] have any sisters?  
Include natural siblings only

<table>
<thead>
<tr>
<th>1. YES</th>
<th>5. NO</th>
<th>GO TO KL34 (L34)</th>
</tr>
</thead>
</table>

KL29. How many sisters was that?  
(TWO DIGITS: RANGE=1-25)

<table>
<thead>
<tr>
<th>NUMBER</th>
<th></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th></th>
<th>1. YES</th>
<th>5. NO</th>
<th>GO TO KL34 (L34)</th>
</tr>
</thead>
</table>

KL30. Is she still living?  

<table>
<thead>
<tr>
<th>1. YES</th>
<th>5. NO</th>
</tr>
</thead>
</table>

KL31. [Is/Was] she older than [you/your wife/"WIFE"/HEAD]?  

<table>
<thead>
<tr>
<th>1. YES</th>
<th>5. NO</th>
</tr>
</thead>
</table>

GO TO KL34 (L34)

KL32. How many of them are still living?  

<table>
<thead>
<tr>
<th>96. ALL</th>
<th>OTHER # (1-25)</th>
<th>00. NONE</th>
</tr>
</thead>
</table>

KL33. [Are/Were] any of [your/her/his] sisters older than [you/she is/he is]  

<table>
<thead>
<tr>
<th>1. YES</th>
<th>5. NO</th>
</tr>
</thead>
</table>

KL34. (L34) Did [you /WIFE/"WIFE"/HEAD] grow up on a farm, in a small town, in a large city, or what?

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

KL35. (L34a) In what state (of the U.S.) was that? Can you tell me what County that was?

(THREE 25-CHARACTER VARS: L34ATOWN FOR TOWN/CITY, L34ACOUNTY, AND L34ACOUNTRY FOR FOREIGN COUNTRY; ALSO ONE 2-DIGIT VARIABLE, L34ASTATE FOR STATE IN US (USE TSTATE CODE, MINUS CODE 55))

EXAMPLE: Illinois, Cook County

If DK County, ASK: What was the name of the nearest town?

KL36. (L35) [Have you/Has WIFE/"WIFE"/HEAD] lived in any other states or countries besides where [you are/ she/he is] currently living and where [you/she/he] grew up, including time spent abroad while in the armed forces?

"Lived in" means stayed at least 3 months.

1. YES  5. NO

NOTE: KL37 (L38) is W135 and W136 for 2007, part of a group of new one-time only Wealth questions

KL38. (L39) [Were you/Was WIFE/"WIFE"/HEAD] living with both [your/her/his] natural parents most of the time until [you were/she was] age 16?

1. YES  5. NO

KL39. (K33aL39a) 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/your wife/"WIFE"/HEAD] background. [Are you/Is she/he] Spanish, Hispanic, or Latino? That is, Mexican, Mexican American, Chicano, Puerto Rican, Cuban, or other Spanish?

1. MEXICAN  2. MEXICAN AMERICAN  3. CHICANO  4. PUERTO RICAN  5. CUBAN  7. OTHER (SPECIFY)  0. IS NOT SPANISH/HISPANIC

KL40. (K34L40) What is [your/your wife/"WIFE"/HEAD] race? [Are you/Is she/he] white, black, American Indian, Alaska Native, Asian, Native Hawaiian or Other Pacific Islander?

ENTER all that apply

1. WHITE  2. BLACK  3. AMERICAN INDIAN OR ALASKA NATIVE  4. ASIAN  5. NATIVE HAWAIIAN OR PACIFIC ISLANDER  7. SOME OTHER RACE (SPECIFY)

KL41. (K34aL41) What is [your/her/his] ancestry or ethnic origin? (OPENEND)

IF NECESSARY: From what country or part of the world did [your/her/his] ancestors come from? Is there a second? (What is it?)

KL42. (K35L42) [Have you/Has she/he] ever been in the United States military service?

1. YES  5. NO
KL43. (K36L43) Where did [you/your wife/"WIFE"/HEAD] receive [your/her/his] education--in the United States, outside the United States, or both?

1. UNITED STATES ONLY
2. OUTSIDE THE UNITED STATES ONLY
3. BOTH IN THE UNITED STATES AND OUTSIDE
4. NO EDUCATION
5. GO TO KL62 (K55L62)

KL44. (K37L44) Now I would like to talk about the education [you have/she/he has] received. Did [you/she/he] graduate from high school, get a GED, or neither?

1. GRADUATED FROM HIGH SCHOOL
2. GOT A GED
3. NEITHER

KL45. (K38L45) In what month and year did [you/she/he] graduate? (TWO VARS: K38L45MO=TMONTH, K38L45YR=TYEAR)

KL46. (K39L46) How many grades of school did [you/she/he] finish prior to getting [your/her/his] GED? Record last grade finished prior to receiving GED

00. NONE
01. FIRST GRADE
02. SECOND GRADE
03. THIRD GRADE
04. FOURTH GRADE
05. FIFTH GRADE
06. SIXTH GRADE
07. SEVENTH GRADE
08. EIGHTH GRADE
09. NINTH GRADE
10. TENTH GRADE
11. ELEVENTH GRADE

KL47. (K40L47) In what month and year did [you/she/he] last attend [GRADE IN KL46]? (TWO VARS: K40L47MO=TMONTH, K40L47YR=TYEAR)

KL48. (K41L48) In what month and year did [you/she/he] receive [your/her/his] GED? (TWO VARS: K41L48MO=TMONTH, K41L48YR=TYEAR)

KL49. (K42L49) How many grades of school did [you/she/he] finish? Record last grade finished

00. NONE
01. FIRST GRADE
02. SECOND GRADE
03. THIRD GRADE
04. FOURTH GRADE
05. FIFTH GRADE
06. SIXTH GRADE
07. SEVENTH GRADE
08. EIGHTH GRADE
09. NINTH GRADE
10. TENTH GRADE
11. ELEVENTH GRADE

KL50. (K43L50) In month and what year did [you/she/he] last attend [GRADE IN KL49]? (TWO VARS: K43L50MO=TMONTH, K43L50YR=TYEAR)

GO TO KL51 (K44L51)
KL51. (K44L51) Did [you/she/he] attend college?

- 1. YES
- 5. NO

GO TO KL59 (K52L59)

KL52. (K45L52) In what month and year did [you/she/he] last attend college?

(TWO VARS: K45L52MO=TMONTH PLUS 96=STILL IN SCHOOL, K45L52YR=TYEAR PLUS 9996=STILL IN SCHOOL)
If still in school, ENTER "96" for month and "9996" for year

KL53. (K46L53) What is the highest year of college [you have/she/he has] completed?

- 0. LESS THAN ONE YEAR
- 1
- 2
- 3
- 4
- 5+

GO TO KL59 (K52L59)

KL54. (K47L54) Did [you/she/he] receive a college degree?

- 1. YES
- 5. NO

GO TO KL59 (K52L59)

KL55. (K48L55) What is the highest college degree [you have/she/he 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)

KL56. (K49L56) What was the name of the college? (25-CHARACTER VAR)

KL57. (K50L57) Where was it located? (40-CHARACTER VARIABLE)

KL58. (K51L58) In what month and year did [you/she/he] receive that degree?

(TWO VARS: K51L58MO=TMONTH, K51L58YR=TYEAR)

KL59. (K52L59) CAI CHECKPOINT (VARNAME= KL59CKPT (K52L59CKPT))

SEE KL43 (K36L43) -- WHETHER EDUCATED OUTSIDE THE US

1. RECEIVED AT LEAST SOME EDUCATION OUTSIDE US

ALL OTHERS

GO TO KL62 (K55L62)

KL60. (K53L60) How many years of school did [you/she/he] complete outside of the U.S.?
(2-DIGIT: 1-25)

KL61. (K54L61) What was the highest degree or certificate [you/she/he] earned outside the U.S.?
(OPENEND)
KL62. (K55L62) Did [you/she/he] receive any other degree or certificate through a vocational school, a training school, or an apprenticeship program?

1. YES  
5. NO  
GO TO KL68 (K61L68)

KL63. (K56L63) What type of degree or certificate was that?

1. DEGREE  
2. CERTIFICATE  
3. LICENSE  
4. DIPLOMA (NOT HIGH SCHOOL)  
7. OTHER (SPECIFY)

KL64. (K57L64) In what field was that? (OPENEND)

KL65. (K58L65) From what type of institution or organization was that?

01. VOCATIONAL/TRADE SCHOOL  
02. COMMUNITY/JUNIOR COLLEGE  
03. BUSINESS/SECRETARIAL SCHOOL  
04. ARMED FORCES  
05. HIGH SCHOOL  
06. HOSPITAL/HEALTH CARE FACILITY OR SCHOOL  
07. COSMETOLOGY/BEAUTY/BARBER SCHOOL  
08. POLICE/FIREFIGHTER TRAINING  
09. JOB TRAINING THROUGH GOVT, EXCEPT CODE 08  
10. TRAINING BY PRIVATE EMPLOYER  
11. RELIGIOUS INSTITUTION, BIBLE COLLEGE/SCHOOL  
97. OTHER (SPECIFY)

KL66. (K59L66) In what month and year did [you/she/he] receive that degree or certificate?  
(TWO VARS: K59L66MO=TMONTH, K59L66YR=TYEAR)

KL67. (K60L67) Did [you/she/he] receive any other training degree or certificate?

1. YES  
5. NO  
GO TO KL68 (K61L68)

ASK KL63 – KL67 AGAIN
KL68. (K61L68) What is [your/your wife's/WIFE's/HEAD’s] religious preference?

If answer is generic, such as "Christian" or “Protestant”, PROBE:  What denomination is that?

00. NONE 01. CATHOLIC 02. JEWISH 10. NON-CHRISTIAN/ MUSLIM/ BUDDHIST 13. GREEK/RUSSIAN/ EASTERN ORTHODOX 97. OTHER (SPECIFY)

08. PROTESTANT  

GO TO KL70 (K63L70)

KL69. (K62L69) What denomination is that?

03. BAPTIST 04. LUTHERAN 05. METHODIST/ AFRICAN METHODIST 06. PRESBYTERIAN 07. EPISCOPALIAN 08. PROTESTANT UNSPECIFIED 12. JEHOVAH'S WITNESS 14. "CHRISTIAN"

KL70. (K63L70) How many years altogether [have you/ has she/he] worked for money since (you were/ she/he was) 18?

(2 DIGIT: 1-80)

00. NONE 01. ONE YEAR OR LESS ACTUAL NUMBER OF YEARS: 02 to [Age minus 18] 96. ALL YEARS SINCE 18 98. DK / 99. RF

KL71. (K64L71) How many of these years did [you/she/he] work full-time for most or all of the year?

(TWO DIGITS: 1-80)

00. NONE 01. ONE YEAR OR LESS ACTUAL NUMBER OF YEARS: 02 to [KL91/Age minus 18] 96. ALL YEARS SINCE 18 98. DK / 99. RF

KL72. (K65L72) Thinking of [your/her/his] first full-time regular job, what kind of work did [you/she/he] do? What were [your/her/his] most important activities or duties? (OPENEND)

KL73. (K66L73) What kind of business or industry was that in? (OPENEND)

KL1@END. CAI CHECKPOINT (VARNAME=KL1CKPT)

SEE FU LISTING

1. NEW HEAD IN FU CCS=1 AND ((CYFUHU=1 AND CYAQRTH=101,102 AND PYAQRTH NE 101, 102) OR (CYFUHU=4 AND CYAQRTH=101, 102)) OR CCS=2, 3 AND (CYFUHU=1, 4 AND CYAQRTH=101,102) 5. ALL OTHERS GO TO SECTION M

ASK KL2 - KL73 (K66L73) FOR NEW HEAD, THEN GO TO SECTION M
CHECKPOINT – RESPONDENT IS HEAD/WIFE/"WIFE"

1. RESPONDENT IS HEAD
2. RESPONDENT IS WIFE/"WIFE"
5. ALL OTHERS → GO TO SECTION R

M1_INTRO. In this next to the last section, we will be talking about money donations to charitable organizations.

**Charitable organizations** include religious or non-profit organizations that help those in need or that serve and support the public interests. They range in size from national organizations like the United Way and the American Red Cross down to local community organizations. They serve a variety of purposes such as religious activity, helping people in need, health care and medical research, education, arts, environment, and international aid. Our definition of charity **does not include** political contributions.

**Donations** include any gifts of money, assets, or property made directly to the organization, through payroll deduction, or collected by other means on behalf of the charity. This interview is limited to donations made during the calendar year 2006.

M1. **During the year 2006,** did you [or anyone in your family] **donate** money, assets, or property/goods, with a combined value of **more than $25** to religious or charitable organizations?

1. YES
5. NO → GO TO SECTION R

M2. Did you make any donations specifically for **religious purposes or spiritual development**, for example to a church, synagogue, mosque, TV or radio ministry? Please do not include donations to schools, hospitals, and other charities run by religious organizations. I will be asking you about those donations next.

1. YES
5. NO → GO TO M3

M2a. Altogether, what was the total dollar value of all donations you [and your family] made in 2006 towards **religious purposes**?

$ 6 DIGITS
DON'T KNOW
REFUSED

GO TO M3

M2b. Was it $300 or more?

1. YES
5. NO
8. DON'T KNOW
9. REFUSED

GO TO M4

M2c. $1,000 or more?

1. YES
5. NO

GO TO M4

DK/RF

M2d. $2,500 or more?

1. YES
5. NO

GO TO M3

DK/RF
M3. [M2=1: Not counting the donations you just told me about, during 2006 / ELSE: During 2006] did you [or anyone in your family] donate to any organization that served a combination of purposes? For example, the United Way, the United Jewish Appeal, the Catholic Charities, or your local community foundation?

1. YES  5. NO ➔ GO TO M4

M3a. [Altogether,] what was the total dollar value of all donations you [and your family] made in 2006 towards combined purpose funds?

$ 6 DIGITS ➔ REFUSED

M3b. Was it $200 or more?

1. YES  5. NO  8. DON'T KNOW  9. REFUSED ➔ GO TO M4

M3c. $500 or more?

1. YES  5. NO  DK/RF ➔ GO TO M4

M3d. $1,000 or more?

1. YES  5. NO  DK/RF ➔ GO TO M4

M3e. $100 or more?

1. YES  5. NO  DK/RF ➔ GO TO M4

M4. [M2=1 OR M3=1: Not counting the donations you just told me about, did you/ ELSE: Did you] [or anyone in your family] make any donations (during 2006) to organizations that help people in need of food, shelter, or other basic necessities?

1. YES  5. NO ➔ GO TO M5

M4a. What was the total dollar value of all donations you [and your family] made in 2006 to organizations that help people in need of basic necessities?

$ 6 DIGITS ➔ REFUSED

M4b. Was it $200 or more?

1. YES  8. DON'T KNOW  9. REFUSED ➔ GO TO M5

M4c. $500 or more?

1. YES  5. NO  DK/RF ➔ GO TO M5

M4d. $1,000 or more?

1. YES  5. NO  DK/RF ➔ GO TO M5

M4e. $100 or more?

1. YES  5. NO  DK/RF ➔ GO TO M5
M5. \( M2=1 \text{ OR } M3=1 \text{ OR } M4=1 \): (Not counting the donations you just told me about,) did you/ ELSE: Did you [or anyone in your family] make donations (during 2006) to health care or medical research organizations? For example, to hospitals, nursing homes, mental health facilities, cancer, heart and lung associations, or telethons?

1. YES 5. NO  

M5a. What was the total dollar value of all donations you [and your family] made in 2006 towards health care or medical research organizations?

\$ 6 DIGITS  

GO TO M6

M5b. Was it $200 or more?

1. YES 5. NO 8. DON'T KNOW 9. REFUSED

M5c. $500 or more?

1. YES 5. NO DK/RF  

GO TO M6

M5d. $1,000 or more?

1. YES 5. NO DK/RF  

GO TO M6

M5e. $100 or more?

1. YES 5. NO DK/RF  

GO TO M6

M6. \( M2=1 \text{ OR } M3=1 \text{ OR } M4=1 \text{ OR } M5=1 \): (Not counting the donations you just told me about,) did you/ ELSE: Did you [or anyone in your family] make donations (during 2006) towards educational purposes? For example, to colleges, grade schools, PTAs, libraries, or scholarship funds? Please do not include direct tuition payments for you or other family members.

1. YES 5. NO  

M6a. What was the total dollar value of all donations you [and your family] made in 2006 towards educational purposes?

\$ 6 DIGITS  

GO TO M7

M6b. Was it $200 or more?

1. YES 5. NO 8. DON'T KNOW 9. REFUSED

M6c. $500 or more?

1. YES 5. NO DK/RF  

GO TO M7

M6d. $1,000 or more?

1. YES 5. NO DK/RF  

GO TO M7

M6e. $100 or more?

1. YES 5. NO DK/RF  

GO TO M7
M7. [M2=1 OR M3=1 OR M4=1 OR M5=1 OR M6=1] Not counting the donations you just told me about, (during 2006,) did you/ELSE: (During 2006) did you] [or anyone in your family] make donations to organizations that provide youth or family services? Such as to scouting, boys’ and girls’ clubs, sports leagues, Big Brothers or Sisters, foster care, or family counseling?

1. YES  
5. NO  
GO TO M8

M7a. What was the total dollar value of all donations you [and your family] made in 2006 towards youth and family services purposes?

$ 6 DIGITS  
DON'T KNOW  
REFUSED  
GO TO M8

M7b. Was it $200 or more?

1. YES  
5. NO  
8. DON'T KNOW  
9. REFUSED

M7c. $500 or more?

1. YES  
5. NO  
DK/RF

GO TO M8

M7d. $1,000 or more?

1. YES  
5. NO  
DK/RF

GO TO M8

M8. [M2=1 OR M3=1 OR M4=1 OR M5=1 OR M6=1 OR M7=1] Not counting the donations you just told me about, during 2006,) did you/ELSE: (During 2006) did you] [or anyone in your family] make donations to organizations that support or promote the arts, culture, or ethnic awareness? Such as, to a museum, theatre, orchestra, public broadcasting, or ethnic cultural awareness?

1. YES  
5. NO  
GO TO M9

M8a. What was the total dollar value of all donations you [and your family] made in 2006 towards the arts, culture, or ethnic awareness?

$ 6 DIGITS  
DON'T KNOW  
REFUSED  
GO TO M9

M8b. Was it $200 or more?

1. YES  
5. NO  
8. DON'T KNOW  
9. REFUSED

M8c. $500 or more?

1. YES  
5. NO  
DK/RF

GO TO M9

M8d. $1,000 or more?

1. YES  
5. NO  
DK/RF

GO TO M9
M9. [M2=1 OR M3=1 OR M4=1 OR M5=1 OR M6=1 OR M7=1 OR M8=1]: Not counting the donations you just told me about, (during 2006,) did you/ ELSE: (During 2006,) did you] [or anyone in your family] make donations to organizations that **improve neighborhoods and communities**? Such as, to community associations or service clubs?

1. YES  5. NO  GO TO M10

M9a. What was the total dollar value of all donations you [and your family] made **in 2006** towards **improving neighborhoods and communities**?

$ 6 DIGITS  
DON'T KNOW  REFUSED  
GO TO M10

M9b. Was it $200 or more?

1. YES  5. NO  8. DON'T KNOW  9. REFUSED

M9c. $500 or more?

1. YES  5. NO  DK/RF  
GO TO M10

M9d. $1,000 or more?

1. YES  5. NO  DK/RF  
GO TO M10

M10. [M2=1 OR M3=1 OR M4=1 OR M5=1 OR M6=1 OR M7=1 OR M8=1 OR M9=1]: (Not counting the donations you just told me about, during 2006,) did you/ ELSE: (During 2006,) did you] [or anyone in your family] make donations to organizations that **preserve the environment**? Such as, for conservation efforts, animal protection, or parks?

1. YES  5. NO  GO TO M11

M10a. What was the total dollar value of all donations you [and your family] made **in 2006** towards **preserving the environment**?

$ 6 DIGITS  
DON'T KNOW  REFUSED  
GO TO M11

M10b. Was it $200 or more?

1. YES  5. NO  8. DON'T KNOW  9. REFUSED  
GO TO M11

M10c. $500 or more?

1. YES  5. NO  DK/RF  
GO TO M11

M10d. $1,000 or more?

1. YES  5. NO  DK/RF  
GO TO M11
M11.  [M2=1 OR M3=1 OR M4=1 OR M5=1 OR M6=1 OR M7=1 OR M8=1 OR M9=1 OR M10=1]: (Not counting the donations you just told me about, during 2006,) did you/ ELSE: (During 2006,) did you [or anyone in your family] make donations to organizations that provide international aid or promote world peace? Such as, international children’s funds, disaster relief, or human rights?

1. YES  5. NO  GO TO M12

M11a. What was the total dollar value of all donations you [and your family] made in 2006 towards providing international aid or promoting world peace?

$ 6 DIGITS
DON'T KNOW  REFUSED

GO TO M12

M11b. Was it $200 or more?

1. YES  5. NO  8. DON'T KNOW  9. REFUSED

GO TO M12

M11c. $500 or more?

1. YES  5. NO  DK/RF

GO TO M12

M11d. $1,000 or more?

1. YES  5. NO  DK/RF

GO TO M12

M12.  [M2=1 OR M3=1 OR M4=1 OR M5=1 OR M6=1 OR M7=1 OR M8=1 OR M9=1 OR M10=1 OR M11=1]: Not counting the donations you just told me about, did you/ ELSE: (During 2006,) did you [or anyone in your family] make donations (during 2006) of money, assets, or property to charitable organizations with purposes other than those we just talked about?

1. YES  5. NO  GO TO SECTION R

M12a. What was the main purpose or cause supported by that organization? (AO) Please tell me a little more about that. What do these organizations do? (vets’ orgs, police/firefighters assoc, historical/memorial societies, animal shelters)

M12b. What was the total dollar value of all donations you [and your family] made in 2006 towards (this/these) last purpose(s)?

$ 6 DIGITS
DON'T KNOW  REFUSED

GO TO SECTION R

M10b. Was it $200 or more?

1. YES  5. NO  8. DON'T KNOW  9. REFUSED

GO TO SECTION R

M10c. $500 or more?

1. YES  5. NO  DK/RF

GO TO SECTION R

M10e. $100 or more?

1. YES  5. NO  DK/RF

GO TO SECTION R
SECTION R: T-2 INCOME

RINTRO. Because we interview our families every other year, we often miss important financial information. In this last section of the interview, I will be asking you a few questions about your income from two years ago, that is 2005.

LABOR INCOME – CURRENT H/W/"W"
R1CKPT. CAI CHECKPOINT - WHETHER CURRENT HEAD/WIFE/"WIFE" WORKED IN 2005

1. WORKED IN 2005
   ASSIGNED FOR HEAD USING BCWTR2005 (CYFUHU 01, 04 & CYAQRTH 101, 102)
   ASSIGNED FOR W/"W" USING DEWTR2005 (CYFUHU 01, 04 & CYAQRTH 202, 222)

5. ALL OTHERS

GO TO R7CKPT

R2. Earlier you reported that [you were/Head was/Wife/"Wife" was] working in 2005. Thinking now about all the work for money that [you/he/she] did during 2005, including jobs, businesses, self-employment and part-time work, about how much did [you/he/she] earn altogether in 2005? Please include any income from bonuses, overtime, tips or commissions.

IF NECESSARY: Please give me your best estimate.

$ ______ per

1. HOUR  3. WEEK  4. TWO WEEKS  5. MONTH  6. YEAR  7. OTHER – SPECIFY

R3. During which months of 2005 did [you/he/she] earn that income?

ENTER all that apply

01. JAN  02. FEB  03. MAR  04. APR  05. MAY  06. JUNE
07. JUL  08. AUG  09. SEP  10. OCT  11. NOV  12. DEC  13. ALL

R7CKPT - WHETHER CURRENT WIFE/"WIFE" IN FU

1. WIFE/"WIFE" IN FU

GO TO R8CKPT

5. ALL OTHERS

RETURN TO R1CKPT

LABOR INCOME – OFUMS NOW 18+ IN 2005 FU (INCLUDING FORMER H/W/"W")
R8CKPT. CAI CHECKPOINT - WHETHER ANY OFUM IN 2005 ARE AGE > 17 AT TIME OF IW

CYAGE GE 18 AND
((CCS=1, 3 AND (CYFUHU=1 AND CYAQRTH GT 222)) OR (CYFUHU=6-12 AND CYYMIO=2005-2007) OR (CYFUHU=4 AND CYAQRTH LE 2005 AND CYAQRTH GT 222))

OR CCS=2 AND CYFUHU=4 AND CYAQRTH GT 222)

1. OFUMS NOW 18+ IN 2005 FU

GO TO R9

5. ALL OTHERS

GO TO R16
R9. Were any other adult family members, that is, family members who were at least 16 years old in 2005, employed in 2005? Adult means age 16 or older in 2005.

1. YES  5. NO  ➡ GO TO R16

R10. Who was that?
(CYAQSN LIST 01-24; DISPLAY NAME, RTH, FUHU)
ENTER all that apply
IF CCS=1, 3: OFUMS NOW 18+ WHO WERE IN 2005 FU (INC FORMER H/W/"W")
IF CCS=2, 4: OFUMS NOW 18+ (INC FORMER H/W/"W")

ASK R11-R15 FOR EACH PERSON SELECTED AT R10

R11. About how much did [NAME/you] earn altogether from working at (that job/those jobs) in 2005? Please include any income from bonuses, overtime, tips or commissions.

$ ________ per
1. HOUR  3. WEEK  4. TWO WEEKS  5. MONTH  6. YEAR  7. OTHER – SPECIFY

R12. About how many weeks did [he/she/you] (FNAME, RTH, AGEIWDATE) work (on any jobs) during 2005? (01-52)

R13. During which months of 2005 was that?
ENTER all that apply

01. JAN  02. FEB  03. MAR  04. APR  05. MAY  06. JUNE
07. JUL  08. AUG  09. SEP  10. OCT  11. NOV  12. DEC  13. ALL

R14. During the months that [he/she/you] (FNAME, RTH, AGEIWDATE) worked, about how many hours did [he/she/you] usually work per week?
(1-112)

R14 CkPt. CAI CHECKPOINT - WHETHER OFUM WORKED 52 WEEKS IN 2005
1. R12 < 52 WEEKS OR R12 = DK/RF
3. MORE ELIGIBLE OFUMS 5. ALL OTHERS

REPEAT R11-R15 FOR NEXT OFUM  ➡ GO TO R16

R15. During which months of 2005 [was he/was she/were you] (FNAME, RTH, AGEIWDATE) unemployed and looking for work?
ENTER all that apply. USE “All” for 12 months and use “None” for No months

01. JAN  02. FEB  03. MAR  04. APR  05. MAY  06. JUNE
07. JUL  08. AUG  09. SEP  10. OCT  11. NOV  12. DEC  13. ALL

REPEAT R11-R15 FOR NEXT OFUM
ELSE GO TO R16
RENT, DIVIDENDS, INTEREST, TRUST FUNDS OR ROYALTIES

R16. Next, some questions about other types of income you [and other members of your family] might have received in 2005. Did [you/anyone in this family] receive any income in 2005 from rent, dividends, interest, trust funds or royalties?

1. YES  5. NO  → GO TO R41

R17. Who was that? (Who in the family received income from rent, dividends, interest, trust funds or royalties in 2005?)

(CYAQSN LIST 01-24; DISPLAY NAME, RTH, FUHU)

ENTER all that apply

IF CCS=1, 3: CURRENT H/W/”W”; OFUMS NOW 18+ WHO WERE IN 2005 FU (INC FORMER H/W/”W”)
IF CCS=2, 4: CURRENT H/W/”W”; OFUMS NOW 18+ (INC FORMER H/W/”W”)

R18. How much did [you (and your family)/NAME/ these members of the family] get altogether during 2005 from all such assets (that is, from rent, dividends, interest, trust funds and royalties)?

$ ________ per 5. MONTH 6. YEAR 7. OTHER – SPECIFY

R19. During which months of 2005 did [you/he/she/they] get any of this income (rent, dividends, interest, trust funds or royalties)?

ENTER all that apply

01. JAN 02. FEB 03. MAR 04. APR 05. MAY 06. JUNE
07. JUL 08. AUG 09. SEP 10. OCT 11. NOV 12. DEC 13. ALL

TANF

R41. At any time during 2005, even for one month, did [you/anyone in this family] receive any income from TANF (or [NAME OF STATE AID PROGRAM IF TANF NOT THE ONE]), formerly called ADC or AFDC?

DO NOT include federal food stamps or SSI.

DO include ADC, AFDC/TANF, General Assistance programs, emergency assistance, Cuban/Haitian refugee, or Indian assistance programs.

1. YES  5. NO  → GO TO R47

R42. Who in the family was covered by this in 2005 (that is, TANF (or [NAME OF STATE AID PROGRAM IF TANF NOT THE ONE]), formerly called ADC or AFDC)?

(CYAQSN LIST 01-24; DISPLAY NAME, RTH, FUHU)

ENTER all that apply

IF CCS=1, 3: CURRENT H/W/”W”; OFUMS WHO WERE IN 2005 FU (INC FORMER H/W/”W”)
IF CCS=2, 4: CURRENT H/W/”W”; OFUMS (INC FORMER H/W/”W”)

ASK R43-R44 FOR EACH PERSON SELECTED AT R42

R43. In which state [were you/was NAME] living at the time [you/he/she] got this income (from TANF (or [NAME OF STATE AID PROGRAM IF TANF NOT THE ONE]), formerly called ADC or AFDC)?

(IWER: Typing state name pops up menu listing choices.)

R44. Which type of aid did [you/NAME] get? (Any others?)

ENTER all that apply

1. STATE TANF PROGRAM  2. ADC / AFDC  3. GENERAL ASSISTANCE  4. EMERGENCY ASSISTANCE
5. CUBAN / HAITIAN REFUGEE  6. INDIAN ASSISTANCE  7. OTHER – SPECIFY
REPEAT R43-R44 FOR NEXT PERSON SELECTED AT R42
ELSE GO TO R45

**R45.** How much did [you (and your family)/NAME/these members of the family] get **altogether** during 2005 from (all of) the program(s) you just mentioned?

$ ________ per

5. MONTH 6. YEAR 7. OTHER – SPECIFY

**R46.** During which months of 2005 did [you/NAME/they] get this income (TANF (or [NAME OF STATE AID PROGRAM IF TANF NOT THE ONE]), formerly called ADC or AFDC)?

ENTER all that apply

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**SUPPLEMENTAL SECURITY INCOME**

**R47.** At any time during 2005 did you [or anyone else in your family there] receive any income from Supplemental Security Income?

1. YES 5. NO

GO TO R51

**R48.** Who was that? (Who in the family received Supplemental Security Income in 2005?)

(CYAQSN LIST 01-24; DISPLAY NAME, RTH, FUHU)

ENTER all that apply

IF CCS=1, 3: CURRENT H/W/"W"; OFUMS WHO WERE IN 2005 FU (INC FORMER H/W/"W")
IF CCS=2, 4: CURRENT H/W/"W"; OFUMS (INC FORMER H/W/"W")

**R49.** How much did [you (and your family)/NAME/these members of the family] get **altogether** during 2005 (from Supplemental Security Income)?

$ ________ per

5. MONTH 6. YEAR 7. OTHER – SPECIFY

**R50.** During which months of 2005 did [you/NAME/they] get this income (Supplemental Security Income)?

ENTER all that apply

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**OTHER WELFARE**

**R51.** At any time during 2005 did you [or anyone else in your family there] receive any income from other welfare?

1. YES 5. NO

GO TO R20

**R52.** Who was that? (Who in the family received other welfare in 2005)?

(CYAQSN LIST 01-24; DISPLAY NAME, RTH, FUHU)

ENTER all that apply

IF CCS=1, 3: CURRENT H/W/"W"; OFUMS WHO WERE IN 2005 FU (INC FORMER H/W/"W")
IF CCS=2, 4: CURRENT H/W/"W"; OFUMS (INC FORMER H/W/"W")
R53. How much did [you (and your family)/NAME/these members of the family] get **altogether** during 2005 (from other welfare)?

$ \underline{\text{_______}} \text{ per } \underline{\text{5. MONTH \ 6. YEAR \ 7. OTHER – SPECIFY}}$

R54. During which months of 2005 did [you/NAME/they] get this income (other welfare)?

ENTER all that apply

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**SOCIAL SECURITY**

R20. Did you [or anyone else in your family there] receive any income in 2005 from Social Security?

**IF NECESSARY**: Including retirement, disability, survivor’s or dependent benefits

1. YES 5. NO  

GO TO R29

R21. Who was that (Who in the family received Social Security in 2005)?

(CYAQSN LIST 01-24; DISPLAY NAME, RTH, FUHU)

ENTER all that apply

IF CCS=1, 3: CURRENT H/W/”W”; OFUMS WHO WERE IN 2005 FU (INC FORMER H/W/”W”)
IF CCS=2, 4: CURRENT H/W/”W”; OFUMS (INC FORMER H/W/”W”)

R22. Was that disability, retirement, survivor's benefits, or what? (Any others?)

ENTER all that apply

1. DISABILITY 2. RETIREMENT 3. SURVIVOR’S BENEFITS 5. DEPENDENT OF DISABLED RECIPIENT

6. DEPENDENT OF RETIRED RECIPIENT 7. OTHER – SPECIFY

R23. How much did [you (and your family)/NAME/these members of the family] get **altogether** during 2005 (from Social Security)?

$ \underline{\text{_______}} \text{ per } \underline{\text{5. MONTH \ 6. YEAR \ 7. OTHER – SPECIFY}}$

R24. During which months of 2005 did [you/NAME/they] get any of this income (Social Security)?

ENTER all that apply

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**VETERANS ADMINISTRATION**

R29. At any time during 2005 did you [or anyone else in your family there] receive any income from the Veteran's Administration for a servicemen's, (widow's,) or survivor's pension, service disability, or the GI bill?

1. YES  5. NO  ➔ GO TO R25

R30. Who was that (Who in the family received income from the Veterans Administration in 2005)?

(CYAQSN LIST 01-24; DISPLAY NAME, RTH, FUHU)

ENTER all that apply

IF CCS=1, 3: CURRENT H/W/"W"; OFUMS WHO WERE IN 2005 FU (INC FORMER H/W/"W")

IF CCS=2, 4: CURRENT H/W/"W"; OFUMS (INC FORMER H/W/"W")

R31. How much did [you (and your family)/NAME/these members of the family] get altogether during 2005 (from the Veterans Administration)?

$________ per  5. MONTH  6. YEAR  7. OTHER – SPECIFY

R32. During which months of 2005 did [you/NAME/they] get this income (Veterans Administration)?

ENTER all that apply

01. JAN  02. FEB  03. MAR  04. APR  05. MAY  06. JUNE  07. JUL  08. AUG  09. SEP  10. OCT  11. NOV  12. DEC  13. ALL

**RETIREMENT PAY, PENSIONS, ANNUITIES**

R25. At any time during 2005 did you [or anyone else in your family there] receive any income from other retirement pay, pensions, or annuities?

1. YES  5. NO  ➔ GO TO R33

R26. Who was that? (Who in the family received retirement pay, pensions, or annuities in 2005)?

(CYAQSN LIST 01-24; DISPLAY NAME, RTH, FUHU)

ENTER all that apply

IF CCS=1, 3: CURRENT H/W/"W"; OFUMS WHO WERE IN 2005 FU (INC FORMER H/W/"W")

IF CCS=2, 4: CURRENT H/W/"W"; OFUMS (INC FORMER H/W/"W")

R27. How much did [you (and your family)/NAME/these members of the family] get altogether during 2005 (from all retirement pay, pensions and annuities)?

$________ per  5. MONTH  6. YEAR  7. OTHER – SPECIFY

R28. During which months of 2005 did [you/NAME/they] get this income (retirement pay, pensions and annuities)?

ENTER all that apply

01. JAN  02. FEB  03. MAR  04. APR  05. MAY  06. JUNE  07. JUL  08. AUG  09. SEP  10. OCT  11. NOV  12. DEC  13. ALL
UNEMPLOYMENT COMPENSATION

R33. At any time during 2005 did you [or anyone else in your family there] receive income from unemployment compensation?

1. YES  5. NO  →  GO TO R37

R34. Who was that? (Who in the family received unemployment compensation in 2005)?
(CYAQN LIST 01-24; DISPLAY NAME, RTH, FUHU)
ENTER all that apply
IF CCS=1, 3: CURRENT H/W/"W"; OFUMS WHO WERE IN 2005 FU (INC FORMER H/W/"W")
IF CCS=2, 4: CURRENT H/W/"W"; OFUMS (INC FORMER H/W/"W")

R35. How much did [you (and your family)/NAME/these members of the family] get altogether during 2005 (from unemployment compensation)?

$ ________ per 5. MONTH  6. YEAR  7. OTHER – SPECIFY

R36. During which months of 2005 did [you/NAME/they] get this income (unemployment compensation)?
ENTER all that apply

<table>
<thead>
<tr>
<th>01. JAN</th>
<th>02. FEB</th>
<th>03. MAR</th>
<th>04. APR</th>
<th>05. MAY</th>
<th>06. JUNE</th>
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<td>07. JUL</td>
<td>08. AUG</td>
<td>09. SEP</td>
<td>10. OCT</td>
<td>11. NOV</td>
<td>12. DEC</td>
</tr>
</tbody>
</table>

WORKERS COMPENSATION

R37. At any time during 2005 did you [or anyone else in your family there] receive income from workers compensation?

1. YES  5. NO  →  GO TO R55

R38. Who was that? (Who in the family received workers compensation in 2005)?
(CYAQN LIST 01-24; DISPLAY NAME, RTH, FUHU)
ENTER all that apply
IF CCS=1, 3: CURRENT H/W/"W"; OFUMS WHO WERE IN 2005 FU (INC FORMER H/W/"W")
IF CCS=2, 4: CURRENT H/W/"W"; OFUMS (INC FORMER H/W/"W")

R39. How much did [you (and your family)/NAME/these members of the family] get altogether during 2005 (from workers compensation)?

$ ________ per 5. MONTH  6. YEAR  7. OTHER – SPECIFY

R40. During which months of 2005 did [you/NAME/they] get this income (workers compensation)?
ENTER all that apply

<table>
<thead>
<tr>
<th>01. JAN</th>
<th>02. FEB</th>
<th>03. MAR</th>
<th>04. APR</th>
<th>05. MAY</th>
<th>06. JUNE</th>
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<td>09. SEP</td>
<td>10. OCT</td>
<td>11. NOV</td>
<td>12. DEC</td>
</tr>
</tbody>
</table>
CHILD SUPPORT, ALIMONY, SEPARATE MAINTENANCE

R55. At any time during 2005 did you [or anyone else in your family there] receive income from child support, alimony, or separate maintenance?

1. YES  5. NO ➔ GO TO R59

R56. Who was that? (Who in the family received child support, alimony, or separate maintenance in 2005)?
(CYAQSN LIST 01-24; DISPLAY NAME, RTH, FUHU)
ENTER all that apply
IF CCS=1, 3: CURRENT H/W/"W"; OFUMS WHO WERE IN 2005 FU (INC FORMER H/W/"W")
IF CCS=2, 4: CURRENT H/W/"W"; OFUMS (INC FORMER H/W/"W")

R57. How much did [you (and your family)/NAME/these members of the family] get altogether during 2005 (from child support, alimony, and separate maintenance)?

$________ per 5. MONTH 6. YEAR 7. OTHER – SPECIFY

R58. During which months of 2005 did [you/NAME/they] get this income (child support, alimony, or separate maintenance)?

ENTER all that apply

RELATIVES, FRIENDS

R59. At any time during 2005 did you [or anyone else in your family there] receive help in the form of money from relatives or friends?

1. YES  5. NO ➔ GO TO R63

R60. Who was that? (Who in the family received help from relatives or friends in 2005)?
(CYAQSN LIST 01-24; DISPLAY NAME, RTH, FUHU)
ENTER all that apply
IF CCS=1, 3: CURRENT H/W/"W"; OFUMS WHO WERE IN 2005 FU (INC FORMER H/W/"W")
IF CCS=2, 4: CURRENT H/W/"W"; OFUMS (INC FORMER H/W/"W")

R61. How much help did [you (and your family)/NAME/these members of the family] get altogether during 2005 (from relatives or friends)?

$________ per 5. MONTH 6. YEAR 7. OTHER – SPECIFY

R62. During which months of 2005 did [you/NAME/they] get this income (relatives or friends)?
ENTER all that apply
ANY OTHER INCOME
R63. Did you [or anyone else in your family there] receive any other income in 2005 from anything else?

1. YES  5. NO ➔ GO TO SECTION S

R64. Who was that? (Who in the family received other income in 2005)?
(CYAQSN LIST 01-24; DISPLAY NAME, RTH, FUHU)
ENTER all that apply
IF CCS=1, 3: CURRENT H/W/"W"; OFUMS WHO WERE IN 2005 FU (INC FORMER H/W/"W")
IF CCS=2, 4: CURRENT H/W/"W"; OFUMS (INC FORMER H/W/"W")

R65. What was that (other income) from?
(OPENEND)

R66. How much help did [you (and your family)/NAME/these members of the family] get altogether during 2005 (from other income)?

$ ________ per 5. MONTH 6. YEAR 7. OTHER – SPECIFY

R67. During which months of 2005 did [you/NAME/they] get this (other) income?
ENTER all that apply

01. JAN  02. FEB  03. MAR  04. APR  05. MAY  06. JUNE
07. JUL  08. AUG  09. SEP  10. OCT  11. NOV  12. DEC  13. ALL
S1_CONSENT. The University of Michigan’s School of Public Health and the Panel Study of Income Dynamics are conducting a study on health-related issues with Respondents in hurricane Katrina areas. The study will be used to better understand people’s experiences as a result of hurricane Katrina whether they resided in the immediately affected or surrounding areas. The questions for this part of the interview focus on the experiences you had during the event, the personal, physical and financial loses you may have experienced as a result of the hurricane, as well as the health problems that you may have had because of your experiences with Hurricane Katrina. Understanding how major natural disasters affect people’s health and their finances can help researchers and policy makers understand what needs should be addressed in similar circumstances.

Some of the survey questions deal with sensitive topics such as mental health, substance use or abuse, as well as loss of family or friends during hurricane Katrina. Some of these questions may be upsetting and you may decide not to answer some of them. Your participation in the study is voluntary and a decision not to participate will not affect your future participation in any way. If there are any questions you do not want to answer, please let me (INTERVIEWER) know and we will move on to the next question. Please understand that the answers you give will be kept confidential and that information from this study will be published only in group form. Your individual name will never be used in any way. If you do choose to participate in the study, you will receive an additional $20 and a list of health resources in your area after the interview is completed.

For any questions regarding the study you may contact the study manager, Eva Leissou, at 1-800-759-7947. Should you have questions regarding your rights as a research participant, please contact the Behavioral Sciences Institutional Review Board, at 734-936-0933.

S1_INTRO. My next questions focus on the impact of Hurricanes Katrina and Rita on you and your household. We are speaking with everyone in the Gulf Coast area, regardless of whether they were physically affected by the hurricanes or not.

S1. Were you displaced from the place you were living because of Katrina or Rita?

1. YES 5. NO

S2. How long were you displaced from your home?

- If R says “Still displaced”, Enter “97” days & [Enter] through weeks & months
- For 1 day or less, Enter “01” days & [Enter] through weeks & months
- Press [Enter] to move to next field without entering an amount
- Use any combination of days, weeks, & months; at least one must have an amount

_ _ Days (01-90) _ _ Weeks (01-52) _ _ Months (01-15)

97. Still displaced

S2A. While you were displaced, did you live with family members you don't usually live with?

1. YES 5. NO
S3. Were you personally present when hurricane force winds or major flooding occurred because of Katrina or Rita?

1. YES  
5. NO

S4. How afraid were you during Katrina or Rita that you might be killed or seriously injured by the storm? Would you say you were not at all afraid, a little afraid, moderately afraid or extremely afraid?

<table>
<thead>
<tr>
<th></th>
<th>1. NOT AT ALL AFRAID</th>
<th>2. A LITTLE AFRAID</th>
<th>3. MODERATELY AFRAID</th>
<th>4. EXTREMELY AFRAID</th>
</tr>
</thead>
</table>

S5. Were you [or anyone in your family living with you at the time] physically injured in any way as a result of Katrina or Rita?

1. YES  
5. NO  
GO TO S6A CHECKPOINT

S5A. Who was that?

(CYAQSN LIST; DISPLAY NAME, RTH, FUHU)

ENTER all that apply

01-24. 2005 FU MEMBERS
97. OTHER SPECIFY

ASK S6 FOR EACH FU MEMBER ENDORSED AT S5A

S6. Would you describe [your/ NAME’s] injuries as major or minor?

<table>
<thead>
<tr>
<th></th>
<th>1. MAJOR</th>
<th>2. MINOR</th>
<th>3. KILLED (VOL)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>(NOT ALLOWED FOR RESPONDENT)</td>
</tr>
</tbody>
</table>

S6A CHECKPOINT – WHETHER S6=KILLED FOR ALL FU MEMBERS

<table>
<thead>
<tr>
<th></th>
<th>ALL FU MEMBERS KILLED</th>
<th>ALL OTHERS</th>
</tr>
</thead>
</table>

S6A. Was anyone [else] in your family living with you at the time killed as a result of Katrina or Rita?

1. YES  
5. NO  
GO TO S7

S6B. Who was that?

(CYAQSN LIST; DISPLAY NAME, RTH, FUHU)

ENTER all that apply

01-24. 2005 FU MEMBERS EXCLUDING R & EXCLUDING MEMBERS WHERE S6=KILLED
97. OTHER SPECIFY

S7. As a result of Katrina or Rita, was anyone else you know injured or killed?

<table>
<thead>
<tr>
<th></th>
<th>1. YES, INJURED</th>
<th>2. YES, KILLED</th>
<th>3. YES, BOTH</th>
<th>5. NO, NEITHER</th>
</tr>
</thead>
</table>

S8A. (As a result of Katrina or Rita,) were any of your relatives or family members not living with you at the time injured or killed?

<table>
<thead>
<tr>
<th></th>
<th>1. YES, INJURED</th>
<th>2. YES, KILLED</th>
<th>3. YES, BOTH</th>
<th>5. NO, NEITHER</th>
</tr>
</thead>
</table>

S8B. (As a result of Katrina or Rita,) were any of your close friends injured or killed?

<table>
<thead>
<tr>
<th></th>
<th>1. YES, INJURED</th>
<th>2. YES, KILLED</th>
<th>3. YES, BOTH</th>
<th>5. NO, NEITHER</th>
</tr>
</thead>
</table>
S8C. Did you have any **acquaintances**, that is, people you did not know well, including work colleagues, who were injured or killed (as a result of Katrina or Rita)?

1. YES, INJURED  
2. YES, KILLED  
3. YES, BOTH  
5. NO, NEITHER

S9A. Did you personally see any dead bodies either during or after Katrina or Rita?

1. YES  
5. NO

S9B. At any time during or after Katrina or Rita, were you unsure about the safety or whereabouts of any family members or close friends?

1. YES  
5. NO

S9C. Altogether, how much damage to your property or possessions did you experience as a result of Katrina or Rita? Would you say no damage, some damage, a moderate amount of damage, or a lot of damage?

1. NO DAMAGE  
2. SOME DAMAGE  
3. A MODERATE AMOUNT OF DAMAGE  
4. A LOT OF DAMAGE

S9D. (As a result of Katrina or Rita,) did you suffer any loss of sentimental possessions, like photographs?

1. YES  
5. NO

S10A. **In the first month after Katrina or Rita,** to what extent did you experience any of the following:

A shortage of food?

Would you say not at all, a little, some, or a lot?

1. NOT AT ALL  
2. A LITTLE  
3. SOME  
4. A LOT

S10B. (In the first month after Katrina or Rita, to what extent did you experience…)

A shortage of water?

(Would you say not at all, a little, some, or a lot?)

1. NOT AT ALL  
2. A LITTLE  
3. SOME  
4. A LOT

S10C. (In the first month after Katrina or Rita, to what extent did you experience…)

Feeling isolated?

(Would you say not at all, a little, some, or a lot?)

1. NOT AT ALL  
2. A LITTLE  
3. SOME  
4. A LOT

S10D. (In the first month after Katrina or Rita, to what extent did you experience…)

Unsanitary conditions, such as inadequate toilets?

(Would you say not at all, a little, some, or a lot?)

1. NOT AT ALL  
2. A LITTLE  
3. SOME  
4. A LOT

S10E. (In the first month after Katrina or Rita, to what extent did you experience…)

Fear of crime?

(Would you say not at all, a little, some, or a lot?)

1. NOT AT ALL  
2. A LITTLE  
3. SOME  
4. A LOT
S10F. (In the first month after Katrina or Rita, to what extent did you experience…) Loss of electricity?

(Would you say not at all, a little, some, or a lot?)

1. NOT AT ALL  2. A LITTLE  3. SOME  4. A LOT

S11. Were you involved in any way in the rescue or recovery efforts after Katrina or Rita?

1. YES  5. NO

S12. Other than rescue and recovery, did you help out in any other way after Katrina or Rita?

1. YES  5. NO

S13_INTRO. Now I’m going to ask you about problems and complaints you may have had because of your experiences with Katrina or Rita. Please indicate how much you have been bothered by each problem.

S13A. Since Katrina and Rita, how much you have been bothered by…
Repeated, disturbing memories, thoughts, or images of Katrina or Rita?

(Would you say not at all, a little bit, moderately, quite a bit, or extremely?)

1. NOT AT ALL  2. A LITTLE BIT  3. MODERATELY  4. QUITE A BIT  5. EXTREMELY

S13B. (Since Katrina and Rita, how much you have been bothered by…) Repeated, disturbing dreams of Katrina or Rita?

(Would you say not at all, a little bit, moderately, quite a bit, or extremely?)

1. NOT AT ALL  2. A LITTLE BIT  3. MODERATELY  4. QUITE A BIT  5. EXTREMELY

S13C. (Since Katrina and Rita, how much you have been bothered by…) Suddenly acting or feeling as if Katrina or Rita were happening again, as if you were reliving it?

(Would you say not at all, a little bit, moderately, quite a bit, or extremely?)

1. NOT AT ALL  2. A LITTLE BIT  3. MODERATELY  4. QUITE A BIT  5. EXTREMELY

S13D. (Since Katrina and Rita, how much you have been bothered by…) Feeling very upset when something reminded you of Katrina or Rita?

(Would you say not at all, a little bit, moderately, quite a bit, or extremely?)

1. NOT AT ALL  2. A LITTLE BIT  3. MODERATELY  4. QUITE A BIT  5. EXTREMELY

S13E. (Since Katrina and Rita, how much you have been bothered by…) Having physical reactions such as heart pounding, trouble breathing, or sweating, when something reminded you of Katrina or Rita?

(Would you say not at all, a little bit, moderately, quite a bit, or extremely?)

1. NOT AT ALL  2. A LITTLE BIT  3. MODERATELY  4. QUITE A BIT  5. EXTREMELY
S13F. (Since Katrina and Rita, how much you have been bothered by…)  
Avoiding thinking about or talking about Katrina or Rita or avoiding having feelings related to it?  
(Would you say not at all, a little bit, moderately, quite a bit, or extremely?)

1. NOT AT ALL  2. A LITTLE BIT  3. MODERATELY  4. QUITE A BIT  5. EXTREMELY

S13G. (Since Katrina and Rita, how much you have been bothered by…)  
Avoiding activities or situations because they reminded you of Katrina or Rita?  
(Would you say not at all, a little bit, moderately, quite a bit, or extremely?)

1. NOT AT ALL  2. A LITTLE BIT  3. MODERATELY  4. QUITE A BIT  5. EXTREMELY

S13H. (Since Katrina and Rita, how much you have been bothered by…)  
Trouble remembering important parts of Katrina or Rita?  
(Would you say not at all, a little bit, moderately, quite a bit, or extremely?)

1. NOT AT ALL  2. A LITTLE BIT  3. MODERATELY  4. QUITE A BIT  5. EXTREMELY

S13J. (Since Katrina and Rita, how much you have been bothered by…)  
Loss of interest in activities that you used to enjoy?  
(Would you say not at all, a little bit, moderately, quite a bit, or extremely?)

1. NOT AT ALL  2. A LITTLE BIT  3. MODERATELY  4. QUITE A BIT  5. EXTREMELY

S13K. (Since Katrina and Rita, how much you have been bothered by…)  
Feeling distant or cut off from other people?  
(Would you say not at all, a little bit, moderately, quite a bit, or extremely?)

1. NOT AT ALL  2. A LITTLE BIT  3. MODERATELY  4. QUITE A BIT  5. EXTREMELY

S13M. (Since Katrina and Rita, how much you have been bothered by…)  
Feeling emotionally numb or being unable to have loving feelings for those close to you?  
(Would you say not at all, a little bit, moderately, quite a bit, or extremely?)

1. NOT AT ALL  2. A LITTLE BIT  3. MODERATELY  4. QUITE A BIT  5. EXTREMELY

S13N. (Since Katrina and Rita, how much you have been bothered by…)  
Feeling as if your future will somehow be cut short?  
(Would you say not at all, a little bit, moderately, quite a bit, or extremely?)

1. NOT AT ALL  2. A LITTLE BIT  3. MODERATELY  4. QUITE A BIT  5. EXTREMELY

S13P. (Since Katrina and Rita, how much you have been bothered by…)  
Trouble falling or staying asleep?  
(Would you say not at all, a little bit, moderately, quite a bit, or extremely?)

1. NOT AT ALL  2. A LITTLE BIT  3. MODERATELY  4. QUITE A BIT  5. EXTREMELY
S13Q. **(Since Katrina and Rita, how much you have been bothered by...)**
Feeling irritable or having angry outbursts?
(Would you say not at all, a little bit, moderately, quite a bit, or extremely?)

1. NOT AT ALL  2. A LITTLE BIT  3. MODERATELY  4. QUITE A BIT  5. EXTREMELY

S13R. **(Since Katrina and Rita, how much you have been bothered by...)**
Having difficulty concentrating?
(Would you say not at all, a little bit, moderately, quite a bit, or extremely?)

1. NOT AT ALL  2. A LITTLE BIT  3. MODERATELY  4. QUITE A BIT  5. EXTREMELY

S13S. **(Since Katrina and Rita, how much you have been bothered by...)**
Being "super-alert" or watchful or on guard?
(Would you say not at all, a little bit, moderately, quite a bit, or extremely?)

1. NOT AT ALL  2. A LITTLE BIT  3. MODERATELY  4. QUITE A BIT  5. EXTREMELY

S13T. **(Since Katrina and Rita, how much you have been bothered by...)**
Feeling jumpy or easily startled?
(Would you say not at all, a little bit, moderately, quite a bit, or extremely?)

1. NOT AT ALL  2. A LITTLE BIT  3. MODERATELY  4. QUITE A BIT  5. EXTREMELY

---

S14. How difficult have these problems made it for you to do your work, take care of things at home, or get along with other people? Would you say not difficult at all, somewhat difficult, very difficult, or extremely difficult?

1. NOT DIFFICULT AT ALL  2. SOMEWHAT DIFFICULT  3. VERY DIFFICULT  4. EXTREMELY DIFFICULT

S15. When was the last time you had any of these problems as a result of Katrina or Rita? Would you say within the last week, within the last month, within the past 6 months, or more than 6 months ago?


---

**S15CKPT. IWER CHECKPOINT**
IWER: You have reached the point that defines a partial Katrina IW. Please tell us how the Katrina interview is going and what should happen now.

1. Continue with Katrina interview.............................................. GO TO S16A
9. R refuses to continue Katrina interview -- Exit Katrina.......... GO TO SECTION N
S16A. The next questions are about ways you may have been feeling or may have behaved. Thinking about the time since Katrina and Rita, how often have you been bothered by…

Little interest or pleasure in doing things?

Would you say not at all, several days, more than half the days or nearly every day?

1. NOT AT ALL  2. SEVERAL DAYS  3. MORE THAN HALF THE DAYS  4. NEARLY EVERY DAY

S16B. (Since Katrina and Rita, how often have you been bothered by…)

Feeling down, depressed, or hopeless?

(Would you say not at all, several days, more than half the days or nearly every day?)

1. NOT AT ALL  2. SEVERAL DAYS  3. MORE THAN HALF THE DAYS  4. NEARLY EVERY DAY

S16C. (Since Katrina and Rita, how often have you been bothered by…)

Trouble falling or staying asleep, or sleeping too much?

(Would you say not at all, several days, more than half the days or nearly every day?)

1. NOT AT ALL  2. SEVERAL DAYS  3. MORE THAN HALF THE DAYS  4. NEARLY EVERY DAY

S16D. (Since Katrina and Rita, how often have you been bothered by…)

Feeling tired or having little energy?

(Would you say not at all, several days, more than half the days or nearly every day?)

1. NOT AT ALL  2. SEVERAL DAYS  3. MORE THAN HALF THE DAYS  4. NEARLY EVERY DAY

S16E. (Since Katrina and Rita, how often have you been bothered by…)

Poor appetite or overeating?

(Would you say not at all, several days, more than half the days or nearly every day?)

1. NOT AT ALL  2. SEVERAL DAYS  3. MORE THAN HALF THE DAYS  4. NEARLY EVERY DAY

S16F. (Since Katrina and Rita, how often have you been bothered by…)

Feeling bad about yourself or that you are a failure or have let yourself or your family down?

(Would you say not at all, several days, more than half the days or nearly every day?)

1. NOT AT ALL  2. SEVERAL DAYS  3. MORE THAN HALF THE DAYS  4. NEARLY EVERY DAY

S16G. (Since Katrina and Rita, how often have you been bothered by…)

Trouble concentrating on things, such as reading the newspaper or watching television?

(Would you say not at all, several days, more than half the days or nearly every day?)

1. NOT AT ALL  2. SEVERAL DAYS  3. MORE THAN HALF THE DAYS  4. NEARLY EVERY DAY
**S16H.** *(Since Katrina and Rita, how often have you been bothered by…)*

Moving or speaking so slowly that other people could have noticed? Or the opposite, being so fidgety or restless that you have been moving around a lot more than usual?

(Would you say not at all, several days, more than half the days or nearly every day?)

| 1. NOT AT ALL | 2. SEVERAL DAYS | 3. MORE THAN HALF THE DAYS | 4. NEARLY EVERY DAY |

**S16J.** *(Since Katrina and Rita, how often have you been bothered by…)*

Thoughts that you would be better off dead or of hurting yourself in some way?

(Would you say not at all, several days, more than half the days or nearly every day?)

| 1. NOT AT ALL | 2. SEVERAL DAYS | 3. MORE THAN HALF THE DAYS | 4. NEARLY EVERY DAY |

---

**S17.** How difficult have these problems made it for you to do your work, take care of things at home, or get along with other people? Would you say not difficult at all, somewhat difficult, very difficult, or extremely difficult?

| 1. NOT DIFFICULT AT ALL | 2. SOMEWHAT DIFFICULT | 3. VERY DIFFICULT | 4. EXTREMELY DIFFICULT |

**S18.** Thinking about the time *since Katrina and Rita*, did these experiences or feelings you just mentioned ever happen at the same time, or at least within the same two week period?

| 1. YES | 5. NO | GO TO S20A |

**S19.** When was the last time you had a lot of these experiences, moods, or feelings at the same time? Would you say within the last week, within the last month, within the past 6 months, or more than 6 months ago?


**S20A.** *(Since Katrina and Rita, how often have you been bothered by…)*

Feeling nervous, anxious or on edge?

Would you say not at all, several days, more than half the days or nearly every day?

| 1. NOT AT ALL | 2. SEVERAL DAYS | 3. MORE THAN HALF THE DAYS | 4. NEARLY EVERY DAY |
S20B. (Since Katrina and Rita, how often have you been bothered by…) Not being able to stop or control worrying?
(Would you say not at all, several days, more than half the days or nearly every day?)

1. NOT AT ALL  2. SEVERAL DAYS  3. MORE THAN HALF THE DAYS  4. NEARLY EVERY DAY

S20C. (Since Katrina and Rita, how often have you been bothered by…) Worrying too much about different things?
(Would you say not at all, several days, more than half the days or nearly every day?)

1. NOT AT ALL  2. SEVERAL DAYS  3. MORE THAN HALF THE DAYS  4. NEARLY EVERY DAY

S20D. (Since Katrina and Rita, how often have you been bothered by…) Trouble relaxing?
(Would you say not at all, several days, more than half the days or nearly every day?)

1. NOT AT ALL  2. SEVERAL DAYS  3. MORE THAN HALF THE DAYS  4. NEARLY EVERY DAY

S20E. (Since Katrina and Rita, how often have you been bothered by…) Being so restless that it is hard to sit still?
(Would you say not at all, several days, more than half the days or nearly every day?)

1. NOT AT ALL  2. SEVERAL DAYS  3. MORE THAN HALF THE DAYS  4. NEARLY EVERY DAY

S20F. (Since Katrina and Rita, how often have you been bothered by…) Becoming easily annoyed or irritable?
(Would you say not at all, several days, more than half the days or nearly every day?)

1. NOT AT ALL  2. SEVERAL DAYS  3. MORE THAN HALF THE DAYS  4. NEARLY EVERY DAY

S20G. (Since Katrina and Rita, how often have you been bothered by…) Feeling afraid as if something awful might happen?
(Would you say not at all, several days, more than half the days or nearly every day?)

1. NOT AT ALL  2. SEVERAL DAYS  3. MORE THAN HALF THE DAYS  4. NEARLY EVERY DAY

ANY S20A – S20G = 2-4  ALL OTHERS  GO TO S23_INTRO

S21. How difficult have these feelings made it for you to do your work, take care of things at home, or get along with other people? Would you say not difficult at all, somewhat difficult, very difficult, or extremely difficult?

1. NOT DIFFICULT AT ALL  2. SOMewhat DIFFICULT  3. VERY DIFFICULT  4. EXTREMELY DIFFICULT
S22. When was the last time you had a lot of these moods or feelings at the same time? Would you say within the last week, within the last month, within the past 6 months, or more than 6 months ago?

1. WITHIN THE LAST WEEK
2. WITHIN THE LAST MONTH
3. WITHIN THE PAST 6 MONTHS
4. MORE THAN 6 MONTHS AGO

S23_INTRO. The next questions are about help you received from others during the two-month period of time between late August and late October 2005, or, in other words, between Katrina and Halloween. The help does not have to be connected to Katrina or Rita. We are interested in all help you received from anyone in your family or any of your friends, whatever the reason.

S23A. **Between Katrina and Halloween,**
How often was someone willing to listen to you when you needed to talk?
Please rate how often this happened on a scale from 1 to 7, where “1” means Never and “7” means “Always”.

1. NEVER
2 - 6
7. ALWAYS

S23B. **(Between Katrina and Halloween.)**
How often did you have contact with people who were in a similar situation to you?
(On a scale from 1 to 7, where “1” means Never and “7” means “Always”)

1. NEVER
2 - 6
7. ALWAYS

S23C. **(Between Katrina and Halloween.)**
How often were you able to talk about your thoughts and feelings with others?
(On a scale from 1 to 7, where “1” means Never and “7” means “Always”)

1. NEVER
2 - 6
7. ALWAYS

S23D. **(Between Katrina and Halloween.)**
How often did you receive sympathy and support from others?
(On a scale from 1 to 7, where “1” means Never and “7” means “Always”)

1. NEVER
2 - 6
7. ALWAYS

S23E. **(Between Katrina and Halloween.)**
How often did you receive practical help from others?
(On a scale from 1 to 7, where “1” means Never and “7” means “Always”)

1. NEVER
2 - 6
7. ALWAYS

S23F. **(Between Katrina and Halloween.)**
How often did you feel let down?
(On a scale from 1 to 7, where “1” means Never and “7” means “Always”)

1. NEVER
2 - 6
7. ALWAYS
S24. How often are you in contact with any members of your family or friends who do not live with you, including visits, phone calls, letters, or e-mail. Would you say nearly every day, 3 to 4 days a week, 1 to 2 days a week, 1 to 3 days a month, less than once a month, or never?

1. NEARLY EVERY DAY  2. 3 - 4 DAYS A WEEK  3. 1 - 2 DAYS A WEEK  4. 1 - 3 DAYS A MONTH
5. LESS THAN ONCE A MONTH  6. NEVER  7. NO FAMILY / FRIENDS (VOL)

S25_INTRO. Some people who have been through disasters also have been through other events that may be extraordinarily stressful, frightening or upsetting to almost anyone. Now I am going to ask you about some of these types of events other than Katrina and Rita.

S25A1. During your lifetime, other than Katrina and Rita, have you ever been through a natural disaster, such as a major earthquake, hurricane, flood, or tornado?

1. YES  5. NO
GO TO S25B1

S25A2. Was that before or after Katrina and Rita?

1. BEFORE BOTH KATRINA AND RITA  2. AFTER KATRINA BUT BEFORE RITA  3. AFTER BOTH KATRINA AND RITA  4. BOTH BEFORE AND AFTER THE HURRICANES (VOL)

S25B1. (During your lifetime.) Have you ever been through a serious accident at work, in a car or somewhere else?

1. YES  5. NO
GO TO S25C1

S25B2. Was that before or after Katrina and Rita?

1. BEFORE BOTH KATRINA AND RITA  2. AFTER KATRINA BUT BEFORE RITA (VOL)  3. AFTER BOTH KATRINA AND RITA  4. BOTH BEFORE AND AFTER THE HURRICANES (VOL)

S25C1. (During your lifetime.) Have you ever been attacked with a gun, knife or some other weapon, regardless of when it happened, who did it or whether it was reported?

1. YES  5. NO
GO TO S25D1

S25C2. Was that before or after Katrina and Rita?

1. BEFORE BOTH KATRINA AND RITA  2. AFTER KATRINA BUT BEFORE RITA (VOL)  3. AFTER BOTH KATRINA AND RITA  4. BOTH BEFORE AND AFTER THE HURRICANES (VOL)

S25C3. Who was it that attacked you? Was it a stranger, a friend or acquaintance, your spouse or romantic partner, a relative, or someone else who attacked you?

1. STRANGER  2. FRIEND OR ACQUAINTANCE  3. SPOUSE OR ROMANTIC PARTNER  4. RELATIVE  5. SOMEONE ELSE
S25D.  (During your lifetime.)
Have you ever been attacked without a weapon, but with the intent to kill or seriously injure you, regardless of when it happened, who did it or whether it was reported?

1. YES  5. NO  → GO TO S25E

S25D2.  Was that before or after Katrina and Rita?

1. BEFORE BOTH KATRINA AND RITA
2. AFTER KATRINA BUT BEFORE RITA
3. AFTER BOTH KATRINA AND RITA
4. BOTH BEFORE AND AFTER THE HURRICANES (VOL)

S25D3.  Who was it that attacked you? Was it a stranger, a friend or acquaintance, your spouse or romantic partner, a relative, or someone else who attacked you?

1. STRANGER
2. FRIEND OR ACQUAINTANCE
3. SPOUSE OR ROMANTIC PARTNER
4. RELATIVE
5. SOMEONE ELSE

S25E.  (During your lifetime.)
Has someone ever used physical force or threat of force to make you have some type of unwanted sexual contact, that is, contact between someone else and your sexual organs or between you and someone else’s sexual organs?

1. YES  5. NO  → GO TO S25F

S25E2.  Was that before or after Katrina and Rita?

1. BEFORE BOTH KATRINA AND RITA
2. AFTER KATRINA BUT BEFORE RITA (VOL)
3. AFTER BOTH KATRINA AND RITA
4. BOTH BEFORE AND AFTER THE HURRICANES (VOL)

S25F.  (During your lifetime.)
Were you ever physically abused or seriously neglected as a child?

1. YES  5. NO

S25G.  (During your lifetime.)
Did you ever participate in military combat?

1. YES  5. NO  → GO TO S25H

S25G2.  Was that before or after Katrina and Rita?

1. BEFORE BOTH KATRINA AND RITA
2. AFTER KATRINA BUT BEFORE RITA (VOL)
3. AFTER BOTH KATRINA AND RITA
4. BOTH BEFORE AND AFTER THE HURRICANES (VOL)
S25H1. **(During your lifetime.)**
Were you ever diagnosed with a life-threatening illness?

1. YES  5. NO  → GO TO S25J1

S25H2. Was that before or after Katrina and Rita?

1. BEFORE BOTH KATRINA AND RITA  2. AFTER KATRINA BUT BEFORE RITA (VOL)  3. AFTER BOTH KATRINA AND RITA  4. BOTH BEFORE AND AFTER THE HURRICANES (VOL)

S25J1. **(During your lifetime.)**
Did someone very close to you ever die unexpectedly?

1. YES  5. NO  → GO TO S25K1

S25J2. Was that before or after Katrina and Rita?

1. BEFORE BOTH KATRINA AND RITA  2. AFTER KATRINA BUT BEFORE RITA (VOL)  3. AFTER BOTH KATRINA AND RITA  4. BOTH BEFORE AND AFTER THE HURRICANES (VOL)

S25K1. **(During your lifetime.)**
Did someone very close to you ever have an extremely traumatic experience?

1. YES  5. NO  → GO TO S25M1

S130K2. Was that before or after Katrina and Rita?

1. BEFORE BOTH KATRINA AND RITA  2. AFTER KATRINA BUT BEFORE RITA (VOL)  3. AFTER BOTH KATRINA AND RITA  4. BOTH BEFORE AND AFTER THE HURRICANES (VOL)

S25M1. **(During your lifetime.)**
Have you ever seen someone seriously injured or violently killed?

1. YES  5. NO  → GO TO S25N1

S25M2. Was that before or after Katrina and Rita?

1. BEFORE BOTH KATRINA AND RITA  2. AFTER KATRINA BUT BEFORE RITA (VOL)  3. AFTER BOTH KATRINA AND RITA  4. BOTH BEFORE AND AFTER THE HURRICANES (VOL)

S25N1. **(During your lifetime.)**
Have you ever been through any other extraordinarily stressful situation or event?

1. YES  5. NO  → GO TO S26A

S25N2. Was that before or after Katrina and Rita?

1. BEFORE BOTH KATRINA AND RITA  2. AFTER KATRINA BUT BEFORE RITA (VOL)  3. AFTER BOTH KATRINA AND RITA  4. BOTH BEFORE AND AFTER THE HURRICANES (VOL)
S26A. The following items are about activities you might do during a typical day. How much does your health now limit you in moderate activities, such as moving a table, pushing a vacuum cleaner, bowling, or playing golf? Would you say a lot, a little, or not at all?

1. A LOT    2. A LITTLE    3. NOT AT ALL

S26B. How about climbing several flights of stairs? Does your health now limit you in this a lot, a little, or not at all?

1. A LOT    2. A LITTLE    3. NOT AT ALL

S27A. During the past month, have you had any of the following problems with your work or other regular daily activities as a result of your physical health, accomplished less than you would like?

1. YES 5. NO

S27B. Were limited in the kind of work or other activities?

(During the past month, did you have this problem with your work or other regular daily activities as a result of your physical health?)

1. YES 5. NO

S27C. During the past month, have you had any of the following problems with your work or other regular daily activities as a result of any emotional problems such as feeling depressed or anxious, accomplished less than you would like?

1. YES 5. NO

S27D. Didn't do work or other activities as carefully as usual?

(During the past month, did you have this problem with your work or other regular daily activities as a result of emotional problems such as feeling depressed or anxious?)

1. YES 5. NO

S28. During the past month, how much did pain interfere with your normal work, including work outside the home and housework? Would you say not at all, a little bit, moderately, quite a bit, or extremely?

1. NOT AT ALL    2. A LITTLE BIT    3. MODERATELY    4. QUITE A BIT 5. EXTREMELY

S29_INTRO. These questions are about how you feel and how things have been with you during the past month. For each question, please give the one answer that comes closest to the way you have been feeling.

S29A. During the past month, how much of the time…

Have you felt calm and peaceful?

Would you say all of the time, most of the time, a good bit of the time, some of the time, a little of the time, or none of the time?

S29B.  **During the past month,** how much of the time [did/have] you…)
Have a lot of energy?
(Would you say all of the time, most of the time, a good bit of the time, some of the time, a little of the time, or none of the time?)


S29C.  **During the past month,** how much of the time [did/have] you…)
Felt downhearted and blue?
(Would you say all of the time, most of the time, a good bit of the time, some of the time, a little of the time, or none of the time?)


S30.  **During the past month,** how much of the time have your physical or emotional problems interfered with your social activities, like visiting with friends or relatives? Would you say all of the time, most of the time, some of the time, a little of the time, or none of the time?


S31_INTRO.  Because alcohol use can affect your health and can interfere with certain medications and treatments, it is important that we ask some questions about your use of alcohol. Your answers will remain confidential so please be honest. When we ask about a drink of alcohol, we mean 1 can or bottle of beer, 1 glass of wine, 1 can or bottle of wine cooler, 1 cocktail, or 1 shot of liquor.

S31.  How often do you have a drink containing alcohol? Would you say never, monthly or less, two to four times a month, two to three times a week, or four or more times a week?

1. NEVER  2. MONTHLY OR LESS  3. 2 - 4 TIMES A MONTH  4. 2 - 3 TIMES A WEEK  5. 4 OR MORE TIMES A WEEK

GO TO SECTION N

S32.  How many drinks containing alcohol do you have on a typical day when you are drinking?

1. 1 OR 2  2. 3 OR 4  3. 5 OR 6  4. 7 TO 9  5. 10 OR MORE

S33.  How often do you have six or more drinks on one occasion? Would you say never, less than monthly, monthly, weekly, or daily?

1. NEVER  2. LESS THAN MONTHLY  3. MONTHLY  4. WEEKLY  5. DAILY
S34A. How often during the last year have you…
Found that you were not able to stop drinking once you had started?
Would you say never, less than monthly, monthly, weekly, or daily?

1. NEVER  2. LESS THAN MONTHLY  3. MONTHLY  4. WEEKLY  5. DAILY

S34B. (How often during the last year have you…)
Failed to do what was normally expected of you because of drinking?
(Would you say never, less than monthly, monthly, weekly, or daily?)

1. NEVER  2. LESS THAN MONTHLY  3. MONTHLY  4. WEEKLY  5. DAILY

S34C. (How often during the last year have you…)
Needed a first drink in the morning to get yourself going after a heavy drinking session?
(Would you say never, less than monthly, monthly, weekly, or daily?)

1. NEVER  2. LESS THAN MONTHLY  3. MONTHLY  4. WEEKLY  5. DAILY

S34D. (How often during the last year have you…)
Had a feeling of guilt or remorse after drinking?
(Would you say never, less than monthly, monthly, weekly, or daily?)

1. NEVER  2. LESS THAN MONTHLY  3. MONTHLY  4. WEEKLY  5. DAILY

S34E. (How often during the last year have you…)
Been unable to remember what happened the night before because of your drinking?
(Would you say never, less than monthly, monthly, weekly, or daily?)

1. NEVER  2. LESS THAN MONTHLY  3. MONTHLY  4. WEEKLY  5. DAILY

S35. Have you or someone else been injured because of your drinking?
If Yes, PROBE: Was that before last year or within the last year?

1. YES, BUT NOT IN THE LAST YEAR  2. YES, DURING THE LAST YEAR  5. NO

S36. Has a relative, friend, doctor or other health care worker been concerned about your drinking or suggested you cut down?
If Yes, PROBE: Was that before last year or within the last year?

1. YES, BUT NOT IN THE LAST YEAR  2. YES, DURING THE LAST YEAR  5. NO
SECTION N: RESPONDENT INCENTIVE, ADDRESS UPDATE, ATTRITOR UPDATE, TA UPDATE

Proxy Address
RPAY1. Interviewer Checkpoint
RsRespondent an FU member?

1. YES, R IS FU MEMBER
5. NO, R IS PROXY (NOT AN FU MEMBER)

GO TO RPAY2A

RPAY1A. You will receive [IF S1_INTRO=1 AND S15 IWER CHECKPT =1 OR 3: $80.00 / OTHERWISE: $60.00] from The University of Michigan in appreciation of your help. In order for the University to send you a check or other correspondence, I must make sure that I have your correct name and mailing address.

ENTER “1” to continue

RPAY1A TITLE – COUNTRY

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<th>TITLE</th>
<th>What is your complete name and mailing address?</th>
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<td>Title -- e.g. “Mr”, “Mrs”, “Ms”, “Miss”, “Dr”</td>
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<td>Start typing the name of the Foreign Country to bring up look-up list</td>
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</table>

RPAY1B. And your area code and phone number?

Area Code and Telephone Number
If foreign phone, enter all 0’s and put foreign number in next field

RPAY1C. Extension?

Enter foreign phone number in this field
If none, PRESS [Enter] to continue

RPAY1D. In whose name is this phone listed?

If phone number is not listed, enter “unlisted”

RPAY1E. Is this a home phone, work phone, or cell phone?

1. HOME
2. WORK
3. CELL

RPAY1F. What is your relationship to [HEAD]?
Verify/update R’s/Head’s mailing address and phone number
ENTER “1” to continue

R Mailing Address

RPAY2A.  [I would also like to have the correct name and address for [HEAD] / You will receive [IF $1_INTRO=1 AND $S15 = 1, $80.00 / OTHERWISE: $60.00] from The University of Michigan in appreciation of your help. In order for the University to send you a check or other correspondence, I must make sure that I have your correct name and mailing address.]

R IS PROXY

ALL OTHERS

GO TO RPAY2B

RPAY2A TITLE - COUNTRY

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<tr>
<th>TITLE</th>
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<td>Enter P. O. Box in Addr2</td>
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</table>

RPAY2A CAI CHECKPOINT

| R IS PROXY | ALL OTHERS | GO TO RPAY2B |

RPAY2A2.  Is there a phone number for [HEAD]?

1. YES

5. NO

GO TO RPAY3A

RPAY2B.  What is [your/ HEAD] area code and phone number?

Area Code and Telephone Number

If foreign phone, enter all 0’s and put foreign number in next field

RPAY2C.  Extension?

Enter foreign phone number in this field

If none, PRESS [Enter] to continue

RPAY2D.  In whose name is this phone listed?

If phone number is not listed, enter “unlisted”

RPAY2E.  Is this a home phone, work phone, or cell phone?

1. HOME

2. WORK

3. CELL

RPAY2F.  Is there a second phone?

1. YES

5. NO

REPEAT RPAY2B-RPAY2E, THEN GO TO RPAY3A

GO TO RPAY3A
**R Street Address**

RPAY3A. Is [your/HEAD] street address where [you/he/she] live[s] different from the mailing address?

1. YES
   5. NO

GO TO RPAY4A

**RPAY3A INCO - COUNTRY**

<table>
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<tr>
<th>INCO</th>
<th>Please tell me that address</th>
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| CITY       | City                        |
| STATE      | State                       |
|            | If foreign country, type FOR; enter Foreign Country at the country screen that follows |
| ZIP        | Zip Code                    |
|            | If foreign country, enter all 0’s |
| COUNTRY    | Country if different from USA |
|            | Start typing the name of the Foreign Country to bring up look-up list |

**Other Payee Address**

RPAY4A. [As a proxy respondent, you may accept the \( S1_{INTRO}=1 \) AND \( S15ICS\_CHECKPT=1,9: \$80.00 / OTHERWISE: \$60.00], have it sent to [HEAD], or sent to someone else of your choosing. / You may accept the \( S1_{INTRO}=1 \) AND \( S15ICS\_CHECKPT=1,9: \$80.00 / OTHERWISE: \$60.00] or have it sent to someone else of your choosing.] Which would you prefer?

1. R/PROXY R ACCEPTS PAYMENT
   2. HEAD RECEIVES PAYMENT (Valid for Proxy R only)
   3. OTHER PERSON RECEIVES PAYMENT
   4. PAYMENT DECLINED (IF VOL)

GO TO RPAY5A

**RPAY4A TITLE - COUNTRY**

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| APTSTE     | (Is there an apartment, suite, or building number?) |
|            | Apt/Suite                                          |
|            | If none, PRESS [Enter] to continue                 |
| ADDR2      | Address 2                                          |
|            | Enter P. O. Box here.                              |
|            | If none, PRESS [Enter] to continue                 |
| CITY       | City                                                |
| STATE      | State                                               |
|            | If foreign country, type FOR; enter Foreign Country at the country screen that follows |
| ZIP        | Zip Code                                            |
|            | If foreign country, enter all 0’s                   |
| COUNTRY    | Country if different from USA                      |
|            | Start typing the name of the Foreign Country to bring up look-up list                |
RPAY4B2. Is there a phone number for [OTHER PAYEE]?

1. YES  5. NO  
GO TO RPAY5A

RPAY4C. What is [OTHER PAYEE] area code and phone number?

Area Code and Telephone Number
If foreign phone, enter all 0’s and put foreign number in next field

RPAY4D. Extension?

Enter foreign phone number in this field
If none, PRESS [Enter] to continue

RPAY4E. In whose name is this phone listed?

If phone number is not listed, enter “unlisted”

RPAY4F. Is this a home phone, work phone, or cell phone?

1. HOME  2. WORK  3. CELL

Contact 1

RPAY5A. [An interviewer for the Study of Family Economics may (telephone/call on) you again in about two years. You will receive a token of our appreciation for that interview too. Just in case you should move before then and we don’t receive your address update 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. / An interviewer for the Study of Family Economics may call to do an interview with [HEAD] again in about two years. Just in case we do not receive [HEAD] address postcard, we need to contact someone who could help us locate [HEAD]. This person should be someone like yourself, a friend or relative, who could also help with the interview, if necessary. ]

ENTER “1” to continue

RPAY5B. Interviewer Checkpoint

Is there Contact Person 1 information displayed below?

1. YES, CONTACT PERSON DISPLAYED  5. NO, NO CONTACT PERSON DISPLAYED  
GO TO RPAY5C TITLE - COUNTRY

RPAY5C. Last time, we had [CONTACT PERSON 1] listed as a contact for [you/HEAD]. Would you like to continue with this contact?

ENTER “7” if R refuses Contact Person information

1. YES, CONTINUE WITH THIS CONTACT  
GO TO RPAY5C TITLE - COUNTRY

2. YES, AND CONTACT PERSON NOT PROXY (Valid for Proxy R only)  
GO TO RPAY5C TITLE - COUNTRY

3. YES, AND CONTACT PERSON IS PROXY (Valid for Proxy R only)  
GO TO RPAY6A

4. NO, CHANGE CONTACT PERSON INFO  
GO TO RPAY5C TITLE - COUNTRY

5. NO, CHANGE CONTACT PERSON INFO  
GO TO RPAY5C TITLE - COUNTRY

6. R REFUSED CONTACT PERSON INFO  
GO TO TY1 CHECKPOINT
<table>
<thead>
<tr>
<th>TITLE</th>
<th>[Does (he/she) still live at this address? Is the phone number right? Area code and phone number? Extension? / Who shall I list as a contact person for you? What is (his/her) complete name and mailing address?]</th>
</tr>
</thead>
<tbody>
<tr>
<td>NAMF</td>
<td>First Name</td>
</tr>
<tr>
<td>NAMM</td>
<td>Middle Name</td>
</tr>
<tr>
<td>NAML</td>
<td>Last Name</td>
</tr>
<tr>
<td>SUFFIX</td>
<td>Suffix -- e.g. “Sr”, “Jr”</td>
</tr>
<tr>
<td>INCO</td>
<td>In Care Of</td>
</tr>
<tr>
<td>COUNTRY</td>
<td>Country if different from USA</td>
</tr>
</tbody>
</table>

**RPAY5C TITLE - COUNTRY**

**RPAY5C2.** Is there a phone number for [CONTACT PERSON 1]?

1. **YES**
5. **NO**

GO TO RPAY5J

**RPAY5E.** What is the area code and phone number?

*Area Code and Telephone Number*

If foreign phone, enter all 0’s and put foreign number in next field

**RPAY5F.** Extension?

*Enter foreign phone number in field*

If none, PRESS [Enter] to continue

**RPAY5G.** In whose name is this phone listed?

*If phone number is not listed, enter “unlisted”*

**RPAY5H.** Is this a home phone, work phone, or cell phone?

1. **HOME**
2. **WORK**
3. **CELL**

**RPAY5I.** Is there a second phone?

1. **YES**
5. **NO**

REPEAT RPAY5E-RPAY5H, THEN GO TO RPAY6A

**RPAY5J.** What is his/her relationship to [you/HEAD]?
Contact 2

Interviewer Checkpoint

Is there Contact Person 2 information displayed below?

1. YES, CONTACT PERSON DISPLAYED  5. NO, NO CONTACT PERSON DISPLAYED

GO TO RPAY6C

RPAY6B. Last time, we had [CONTACT PERSON 2] listed as a contact for [you/HEAD]. Would you like to continue with this contact?

ENTER “7” if R refuses Contact Person information

1. YES, CONTINUE WITH THIS CONTACT  2. YES, AND CONTACT PERSON NOT PROXY (Valid for Proxy R only)  3. YES, AND CONTACT PERSON IS PROXY (Valid for Proxy R only)  5. NO, CHANGE CONTACT PERSON INFO  7. R REFUSED CONTACT PERSON INFO

GO TO RPAY6C  GO TO RPAY6C  GO TO TY1CKPt  GO TO RPAY6C  GO TO TY1 CHECKPOINT

TITLE - COUNTRY

RPAY6C. We would like to have the name of a second contact person, someone who will know where we can reach [you/HEAD] if the first contact is not able to help us. Is there a second contact person who can help us reach [you/HEAD]?

1. YES  5. NO

GO TO TY1 CHECKPOINT

RPAY6C TITLE - COUNTRY

<table>
<thead>
<tr>
<th>TITLE</th>
<th>[Does (he/she) still live at this address? Is the phone number right? Area code and phone number? Extension? / Who shall I list as a contact person for you? What is (his/her) complete name and mailing address?]</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Title -- e.g. “Mr”, “Mrs”, “Ms”, “Miss”, “Dr”</td>
</tr>
<tr>
<td></td>
<td>If no title, PRESS [Enter] to continue</td>
</tr>
<tr>
<td></td>
<td>If R refuses Contact Person info, DO NOT ENTER anything here. Go back to RPAY6B and enter “7” to exit these questions</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>NAMF</th>
<th>First Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>NAMM</td>
<td>Middle Name</td>
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<tr>
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<td>Last Name</td>
</tr>
<tr>
<td>SUFFIX</td>
<td>Suffix -- e.g. “Sr”, “Jr”</td>
</tr>
<tr>
<td>INCO</td>
<td>In Care Of</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ADDR1</th>
<th>Address 1</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Enter P. O. Box in Addr2</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>APTSTE</th>
<th>(Is there an apartment, suite, or building number?)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Apt/Suite</td>
</tr>
<tr>
<td></td>
<td>If none, PRESS [Enter] to continue</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ADDR2</th>
<th>Address 2</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Enter P. O. Box here.</td>
</tr>
<tr>
<td></td>
<td>If none, PRESS [Enter] to continue</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CITY</th>
<th>City</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>STATE</th>
<th>State</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>If foreign country, type FOR; enter Foreign Country at the country screen that follows</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ZIP</th>
<th>Zip Code</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>If foreign country, enter all 0’s</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>Country if different from USA</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Start typing the name of the Foreign Country to bring up look-up list</td>
</tr>
</tbody>
</table>

RPAY6C2. Is there a phone number for [CONTACT PERSON 2]?

1. YES  5. NO

GO TO RPAY6J
RPAY6E. What is the area code and phone number?
   Area Code and Telephone Number
   If foreign phone, enter all 0’s and put foreign number in next field

RPAY6F. Extension?
   Enter foreign phone number in this field
   If no extension, PRESS [Enter] to continue

RPAY6G. In whose name is this phone listed?
   If phone number is not listed, enter “unlisted”

RPAY6H. Is this a home phone, work phone, or cell phone?
   1. HOME  2. WORK  3. CELL

RPAY6I. Is there a second phone?
   1. YES  5. NO

   REPEAT RPAY6E-RPAY6H, THEN GO TO RPAY6A

RPAY6J. What is (his/her) relationship to [you/ HEAD]?

Transition to Adulthood
TY1 CHECKPOINT - TA ELIGIBLE INDIVIDUALS IN FU

TY1. [TYNAME] [AGEIWDATE=18: may be / AGEIWDATE>18: is] eligible to participate in a survey we will be doing in the near future. Will we be able to reach [TYNAME] at [your current address and phone number / the address and phone number that you gave me earlier]?
   1. YES  5. NO

   GO TO TY3 CHECKPOINT

TY2. Do you know what [your/his/her] new address and phone number will be?
   1. YES  5. NO

   GO TO TY3 CHECKPOINT

| ADDR1   | Address 1
|---------|--------------------------------------------------|
|         | Enter P. O. Box in Addr2
|         | Record complete street address including apartment/suite number here
| T Y     | Record any college or university or military base name here
| 3 ADDR2 | Address 2
|         | Enter P. O. Box here.
|         | If none, PRESS [Enter] to continue
| C I T Y | City
| S T A T E | State
|         | If foreign country, type FOR; enter Foreign Country at the country screen that follows

| ZIP     | Zip Code
|         | If foreign country, enter all 0’s
| C O U N T R Y | TY eligible person: TYName, RTH
|         | Country if different from USA
|         | Start typing the name of the Foreign Country to bring up pick list
| P H O N E | What is the area code and phone number?
|         | Area Code and Telephone Number
|         | If foreign phone, enter all “0”s and put foreign number in next field
| E X T E N S I O N | Extension?
|         | Enter foreign phone number in this field
|         | If none, PRESS [Enter] to continue
TY3. Is this phone number for a home phone, a work phone, a cell phone, or something else?

For Educational or Military group housing, use Code 7 - Other Specify and PROBE: “Is that phone number for a private telephone or one that is used by several people?”

1. HOME  2. WORK  3. CELL  7. OTHER SPECIFY

TY3 CHECKPOINT - MORE TA ELIGIBLE FU MEMBERS FOR THIS SID

MORE TA ELIGIBLE FU MEMBERS IN FU (TYELIG2007=1 AND AGEIWDATE > 17 YEARS OLD)
ASK TY1 – TY3 FOR EACH, THEN GO TO RPAY7 CHECKPOINT
ALL OTHERS
GO TO RPAY7 CHECKPOINT

Other Family Updates

RPAY7 CHECKPOINT – WHETHER SAMPLE LEAVERS ARE ATTACHED TO THIS SID

THERE ARE SAMPLE LEAVERS THAT FU NEEDS TO BE ASKED ABOUT (LEAVER=1)
GO TO RPAY7C
ALL OTHERS
GO TO RPAY7 CHECKPOINT

RPAY7A. Interviewer Checkpoint

Are there others in this family folder whose address and phone number need updating?

1. YES  5. NO  GO TO RPAY9 CHECKPOINT

RPAY7B. We would like to update our address and phone number information for other members of [your/ HEAD] family who are also participants in our study. Could you help me with that?

If Yes, make paper notes to update address information -- enter in SurveyTrak later

1. YES  5. NO

GO TO RPAY9 CHECKPOINT

Sample Leavers

RPAY7C. As you know, each participant in the Family Economic Study is very important to us. In order to make our files more accurate, we are asking for your help in finding out what happened to family members who once were original participants in the study. We would appreciate any information you can provide to us about them, such as an address or phone number.

ENTER “1” to continue

RPAY7D. Leaver Name, Age, DOB

[First, / (Next)] can you give me any information (such as an address or phone number) regarding [Leaver], whose birth date we have as [DOB]?

If Necessary: “That would make [him/her] about [EstAge] years old.”

1. YES, R KNOWS CURRENT ADDRESS  2. YES, R ONLY KNOWS CURRENT PHONE  3. YES, R SAYS THIS PERSON IS DECEASED  5. NO, R HAS NO INFORMATION
RPAY7D2. [RPAY7D=1, 2: Is “[Leaver]” [his/her] legal name? / RPAY7D=3: Was “[Leaver]” [his/her] legal name? / RPAY7D=5, DK, RF: Can you tell me if “[Leaver]” is [his/her] legal name?)

1. YES
   GO TO RPAY7D CHECKPOINT

3. NO, BUT R KNOWS LEGAL NAME
   GO TO RPAY7D CHECKPOINT

5. R DK OR RF LEGAL NAME
   GO TO RPAY7D CHECKPOINT

ALL OTHERS
   GO TO RPAY7D CHECKPOINT

RPAY7D3F. Could you give me [his/her] legal name?
   First name
   EDIT name as needed

RPAY7D3L. (Could you give me [his/her] legal name?)
   Last name
   EDIT name as needed

RPAY7D CHECKPOINT – SEE RPAY7D, WHETHER R HAS INFORMATION ABOUT LEAVER

R KNOWS CURRENT ADDRESS
R ONLY KNOWS CURRENT PHONE
R SAYS THIS PERSON IS DECEASED
NO, R HAS NO INFORMATION

GO TO RPAY7F
GO TO RPAY7J
GO TO RPAY7P CHECKPOINT

RPAY7D INCO – COUNTRY

INCO  What is [his/her] current address?
   In Care Of
   If none, PRESS [Enter] to continue
   ADDR1  Address 1
   Enter P. O. Box in Addr2
   APTSTE  (Is there an apartment, suite, or building number?)
   Apt/Suite
   If none, PRESS [Enter] to continue
   ADDR2  Address 2
   Enter P. O. Box here.
   If none, PRESS [Enter] to continue

CITY  City
STATE  State
If foreign country, type FOR; enter Foreign Country at the country screen that follows
ZIP  Zip Code
   If foreign country, enter all 0’s
COUNTRY  Country if different from USA
   Start typing the name of the Foreign Country to bring up look-up list

RPAY7E. Is there a phone number for [Leaver]?

1. YES  5. NO
   GO TO RPAY7P CHECKPOINT

RPAY7F. (What is the area code and phone number?)
   Area Code and Telephone Number
   If foreign phone, enter all 0’s and put foreign number in next field

RPAY7G. Extension?
   Enter foreign phone number in this field
   If none, PRESS [Enter] to continue

RPAY7H. In whose name is this phone listed?
   If phone number is not listed, enter “unlisted”

RPAY7I. Is this a home phone, work phone, or cell phone?

1. HOME  2. WORK  3. CELL
GO TO RPAY7P CHECKPOINT

RPAY7J. When did [Leaver] die?
ENTER MM/DD/YYYY, with or without slashes

RPAY7K. What state did [he/she] die in?
If foreign country, type FOR; enter Foreign Country at the country screen that follows

RPAY7K2. Country if different from USA
Start typing the name of the Foreign Country to bring up look-up list

RPAY7L. [Leaver], Age: [EstAge], DOB: [Mm/Dd/Yyyy]
Is [Mm/Dd/Yyyy] [his/her] correct date of birth?

1. YES
5. NO
8/9. DK/RF

GO TO RPAY7N

GO TO RPAY7M

RPAY7L2. [Leaver], Age: [EstAge], DOB: [Mm/Dd/Yyyy]
What is [his/her] complete date of birth?
ENTER MM/DD/YYYY, with or without slashes

DOB GIVEN
 DK/RF

GO TO RPAY7N

RPAY7M. [Leaver], Age: [EstAge], DOB: [Mm/Dd/Yyyy]
If you don’t know the date of birth, could you tell me how old [he/she] was?
(001-120)

RPAY7N. What state was [he/she] born in?
If foreign country, type FOR; enter Foreign Country at the country screen that follows

RPAY7N2. Country if different from USA
Start typing the name of the Foreign Country to bring up look-up list

RPAY7P. What state was [he/she] residing in at the time of [his/her] death?
If foreign country, type FOR; enter Foreign Country at the country screen that follows

RPAY7P2. Country if different from USA
Start typing the name of the Foreign Country to bring up look-up list

RPAY7P CHECKPOINT

MORE SAMPLE LEAVERS FOR THIS FU  ALL OTHERS
ASK RPAY7D - RPAY7P2 FOR EACH, THEN GO TO RPAY9 CHECKPOINT
GO TO RPAY9 CHECKPOINT
RPAY9 CHECKPOINT

RPAY9A = R/PROXY R ACCEPTS PAYMENT OR HEAD RECEIVES PAYMENT OR OTHER PERSON RECEIVES PAYMENT

RPAY9A = PAYMENT DECLINED

GO TO RPAY9K CHECKPOINT

RPAY9A CHECKPOINT

Interviewer Checkpoint
Can the incentive(s) be paid by check or did R request a money order?
Check and money orders ONLY:
For Non-Standard Interview Payment, Cell Phone Payment, or Temp Mailing Address, SELECT “7. Special Handling”
ENTER all that apply
For multiple response, use space bar or dash to separate responses

1. YES, PAY BY CHECK IN STANDARD AMOUNT
2. YES, PAY BY MONEY ORDER IN STANDARD AMOUNT
5. NO, IWER PAID RESP FEE IN CASH
7. SPECIAL HANDLING (Non-Std IW Pymt; Cell Pymt; Temp Addr)

**Multiple selections allowed are 1 & 7 or 2 & 7 only

RPAY9B CHECKPOINT – SEE RPAY9A, TYPE OF INCENTIVE

RPAY9A = CHECK OR MONEY ORDER ONLY
GO TO RPAY9K CHECKPOINT

RPAY9A = CASH
GO TO RPAY9B

RPAY9A = CHECK OR MONEY ORDER AND / OR SPECIAL HANDLING
GO TO RPAY9D

RPAY9B CHECKPOINT
When did you make the cash payment?
ENTER MM/DD/YYYY, with or without slashes

RPAY9C CHECKPOINT
How much was the Respondent payment for this interview? (60.00-160.00)
ENTER an amount from $60.00 to $160.00
DO NOT INCLUDE amount for cell phone payment here – cell phone payment must be recorded separately at the next screen.
The standard payment for the main PSID interview is $60.00
The additional payment for the Katrina interview is $20.00 display if SI_Intro=Continue

RPAY9C2 CHECKPOINT
How much, if any, was the Respondent payment for cell phone use? (0.00-10.00)
Enter either $0.00 or $10.00
The standard payment for cell phone use is $10.00

GO TO RPAY9K CHECKPOINT
RPAY9D. Please indicate the type(s) of special handling needed. 
ENTER all that apply
For multiple responses, use space bar or dash to separate responses

1. NON-STANDARD IW PAYMENT AMOUNT
   (Rpay9a NE 1 or 2 only)
   GO TO RPAY9D CHECKPOINT

2. TEMPORARY MAILING ADDRESS
   GO TO RPAY9D CHECKPOINT

3. CELL PHONE PAYMENT $10
   GO TO RPAY9D CHECKPOINT

7. OTHER (SPECIFY)
   GO TO RPAY9D CHECKPOINT

**RPAY9D TITLE - COUNTRY**

**TITLE**
- Title -- e.g. “Mr”, “Mrs”, “Ms”, “Miss”, “Dr”
  - If no title, PRESS [Enter] to continue
  - If R refuses Contact Person info, DO NOT ENTER anything here. Go back to RPAY6B and enter “7” to exit these questions

**NAMF** First Name

**NAMM** Middle Name
   If none, PRESS [Enter] to continue

**NAML** Last Name
   If none, PRESS [Enter] to continue

**SUFFIX** Suffix -- e.g. “Sr”, “Jr”
   If none, PRESS [Enter] to continue

**INCO** What is that address?
   - In Care Of
   - If none, PRESS [Enter] to continue

**ADDR1** Address 1
   - Enter P. O. Box in Addr2

**RPAY9D CHECKPOINT**

**RPAY9D = NON-STANDARD AMOUNT**

**ALL OTHERS**
   GO TO RPAY9D2 CHECKPOINT

**RPAY9DAMT.** How much was the Respondent payment for this interview? (60.00-160.00)
ENTER an amount from $60.00 to $160.00
DO NOT INCLUDE amount for cell phone payment here – a separate check must be issued for cell phone payment. Go back to RPay9d and select “3. Cell phone payment”

**RPAY9D2 CHECKPOINT**

**RPAY9D = OTHER (SPECIFY)**

**ALL OTHERS**
   GO TO RPAY9K

**RPAY9DSPEC.** Please specify other special handling needed. (STRING 500)
** Interviewer is not allowed to leave RPay9 series without selecting one of the interview payment types: Rpay9a=1 (check) or Rpay9a=2 (money order) or Rpay9a=5 (cash) or Rpay9d=1 (non-std amt).

IWER: You must select an interview payment type at RPay9A or RPay9D

---

**RPAY9K CHECKPOINT – SET RPAY9K (KATRINA INCENTIVE INDICATOR)**

<table>
<thead>
<tr>
<th>S1_INTRO = CONTINUE &amp; S15CKPT = CONTINUE OR REFUSAL</th>
<th>ALL OTHERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>RPAY9K = 1. YES, ISSUE $20 PAYMENT</td>
<td>RPAY9K = 0. NO, DO NOT ISSUE $20 PAYMENT</td>
</tr>
</tbody>
</table>

---

RPAY8. Thank you, these are all the questions I have for you. As part of our quality control procedures, another interviewer from The University of Michigan may call you back to ask a few questions about this interview and to answer any questions you may have about the interview process.

ENTER “1” to continue

---

**Finder 1**

RPAY10A. Interviewer Checkpoint

Did you or any other interviewer offer a Finder's Fee to get this interview?

1. YES  5. NO  GO TO RPAY12

---

**RPAY10A TITLE - COUNTRY**

<table>
<thead>
<tr>
<th>TITLE</th>
<th>Title -- e.g. “Mr”, “Mrs”, “Ms”, “Miss”, “Dr”</th>
</tr>
</thead>
<tbody>
<tr>
<td>NAMF</td>
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<td>Suffix -- e.g. “Sr”, “Jr”</td>
</tr>
<tr>
<td>INCO</td>
<td>In Care Of</td>
</tr>
<tr>
<td>ADDR1</td>
<td>Address 1</td>
</tr>
<tr>
<td></td>
<td>Enter P. O. Box in Addr2</td>
</tr>
<tr>
<td>APTSTE</td>
<td>Apt/Suite</td>
</tr>
<tr>
<td>ADDR2</td>
<td>Address 2</td>
</tr>
<tr>
<td></td>
<td>Enter P. O. Box here.</td>
</tr>
<tr>
<td>CITY</td>
<td>City</td>
</tr>
<tr>
<td>STATE</td>
<td>State</td>
</tr>
<tr>
<td>ZIP</td>
<td>Zip Code</td>
</tr>
<tr>
<td>COUNTRY</td>
<td>Country if different from USA</td>
</tr>
<tr>
<td></td>
<td>Start typing the name of the Foreign</td>
</tr>
<tr>
<td></td>
<td>Country to bring up look-up list</td>
</tr>
</tbody>
</table>

---

R
**PAY10B2.** Is there a phone number for Finder?

1. YES  
5. NO  → GO TO PAY10G

**PAY10C.** Area Code and Telephone Number  
If foreign phone, enter all “0’s” and put foreign number in next field

**PAY10D.** Extension  
Enter foreign phone number in this field  
If none, PRESS [Enter] to continue

**PAY10E.** Is whose name is this phone number listed?  
If phone number is not listed, enter “unlisted”

**PAY10F.** Is this a home phone, work phone, or cell phone?  

1. HOME  
2. WORK  
3. CELL

**PAY10G.** What is (his/her) relationship to Respondent?

**PAY10H.** How much did you offer this Finder?

<table>
<thead>
<tr>
<th>5. FIVE DOLLARS</th>
<th>10. TEN DOLLARS</th>
<th>15. FIFTEEN DOLLARS</th>
<th>20. TWENTY DOLLARS</th>
</tr>
</thead>
<tbody>
<tr>
<td>($5)</td>
<td>($10)</td>
<td>($15)</td>
<td>($20) (With TL approval)</td>
</tr>
</tbody>
</table>

**PAY10I.** Can the Finder be paid by check or did (he/she) request a money order?

1. CHECK  
2. MONEY ORDER  
3. CASH  
4. DECLINED PAYMENT  

GO TO PAY11A  
GO TO PAY11A  
GO TO PAY11A

**PAY10J.** When was the Finder paid?  
ENTER MM/DD/YYYY, with or without slashes

**Finder 2**

**PAY11A.** Interviewer Checkpoint  
Was there a second Finder's Fee offered for this interview?

1. YES  
5. NO  → GO TO PAY12

**PAY11A TITLE - COUNTRY**

| TITLE | Title -- e.g. “Mr”, “Mrs”, “Ms”, “Miss”, “Dr”  
If no title, PRESS [Enter] to continue |
|-------|----------------------------------------------------------------------------------|
| NAMF  | First Name  
If none, PRESS [Enter] to continue |
| NAMM  | Middle Name  
If none, PRESS [Enter] to continue |
| NAML  | Last Name  
If none, PRESS [Enter] to continue |
| SUFIX | Suffix -- e.g. “Sr”, “Jr”  
If none, PRESS [Enter] to continue |
| INCO  | In Care Of  
If none, PRESS [Enter] to continue |
| ADDR1 | Address 1  
Enter P. O. Box in Addr2 |

| APTSTE | Apt/Suite  
If none, PRESS [Enter] to continue |
| ADDR2  | Address 2  
Enter P. O. Box here.  
If none, PRESS [Enter] to continue |
| CITY   | City  
If none, PRESS [Enter] to continue |
| STATE  | State  
If foreign country, type FOR; enter Foreign Country at the country screen that follows |
| ZIP    | Zip Code  
If foreign country, enter all 0’s |
| COUNTRY | Country if different from USA  
Start typing the name of the Foreign Country to bring up look-up list |
RPAY11B. Is there a phone number for Finder?

1. YES  5. NO  → GO TO RPAY10G

RPAY11C. Area Code and Telephone Number
If foreign phone, enter all “0’s” and put foreign number in next field

RPAY11D. Extension
Enter foreign phone number in this field
If none, PRESS [Enter] to continue

RPAY11E. Is whose name is this phone number listed?
If phone number is not listed, enter “unlisted”

RPAY11F. Is this a home phone, work phone, or cell phone?

1. HOME  2. WORK  3. CELL

RPAY11G. What is (his/her) relationship to Respondent?

RPAY11H. How much did you offer this Finder?

5. FIVE DOLLARS ($5)  10. TEN DOLLARS ($10)  15. FIFTEEN DOLLARS ($15)  20. TWENTY DOLLARS ($20) (With TL approval)

RPAY11I. Can the Finder be paid by check or did (he/she) request a money order?

1. CHECK  2. MONEY ORDER  3. CASH  4. DECLINED PAYMENT

GO TO RPAY12  GO TO RPAY12  GO TO RPAY12

RPAY11J. When was the Finder paid?
ENTER MM/DD/YYYY, with or without slashes

Payment Problems
RPAY12. Were there any Respondent or Finder payment problems reported by this Respondent?

1. YES  5. NO

END OF IW

RPAY12SPEC. Please provide details of payment issue.
INTERVIEWER OBSERVATIONS

These observations should be launched on the final call record for cases coded as Final Interview/Partial: 1001, 1005

IO1. Indicate language(s) used to conduct this interview

ENTER all that apply
1. English
2. Spanish
7. Other than English or Spanish (Specify)

IO1a. Please specify
Question Type: Open End
"IO1a"

IO2. By whom was the translation done?

1. Bilingual interviewer (Spanish or other)
2. Translator/ study aide
3. Other FU member
4. Friend/Non-relative not in FU
7. Other (specify)

IO2a. Please specify
Question Type: Open End
"IO2a"

IO3 CHECKPOINT

See FU listing:

HU/HUCS person is present
(NonFUCount > 0)

NO HU/HUCS people present
(NonFUCount = 0)

GO TO IO4

IO3.
♦ The coverscreen lists the following people living in the household as HU or HUCS and not included in the FU.
♦ For HU person: Please explain the situation and why they are not included in the FU.
♦ For HUCS people: Tell us how these FUs are related and the Sample ID of each HUCS person.

[List of HU and HUCS members from family listing]

IO4. Are there any other persons living in this household whom you did not add to the family listing at the beginning of the interview? Please include FU members, HU persons, and HUCS persons.

1. Yes

IO4a. FAMILY LISTING ROSTER
♦ For each person living there who is not currently listed below, please specify (as much as possible) their FUHU status, Relationship to Head, first and last name, and current age.
♦ For any person age 16 or older, specify what you learned about work, income, births and marriage info.

[Family Listing]
Question Type: Open End
"IO4a"
IO5 CHECKPOINT

See FU listing:

<table>
<thead>
<tr>
<th>NO Wife/“Wife”, Boyfriend, Girlfriend, or Husband of Head in the FU (IO6Flag = Yes)</th>
</tr>
</thead>
</table>

All Others

GO TO IO6 CHECKPOINT

IO5. Specifically, has a new romantic partner of the Head moved in who is **not** listed as part of the FU?

1. Yes, romantic partner moved in, but is not listed in FU
5. No, no romantic partner

IO5a. Please explain why Head’s male/female romantic partner was **not** included as an FU member.

Question Type: Open End

" IO5a"

IO6 CHECKPOINT

See FU listing:

<table>
<thead>
<tr>
<th>IO4 = Yes or IO6Flag = Yes (NO W/“W”, BF, GF, HH in FU)</th>
</tr>
</thead>
</table>

All Others

GO TO IO7 CHECKPOINT

IO6. Did you list any roommates (i.e., not romantically involved) as FU members?

1. Yes, roommates are listed as FU members
2. No, roommates are listed as HU only
5. No roommates in HU

IO6a. Please specify why you listed roommates as FU members.

Question Type: Open End

" IO6a"

IO7 CHECKPOINT

See FU listing:

<table>
<thead>
<tr>
<th>IO4 = Yes or IO5=Yes romantic partner or IO6=Yes roommate or HU/HUCS person is present</th>
</tr>
</thead>
</table>

All Others

GO TO IO8

IO7. Do amounts paid for rent, food, utilities, and the number of rooms reflect only our FU’s share?

1. Yes, amounts are for this FU only
5. No

IO7a. Please specify our FU’s share for all such items that need correction.

Question Type: Open End

" IO7a"
IO8. Please provide a few words about this FU which might help study staff understand any family situations or relationships that aren't straightforward, (e.g., the fact that parents of grandchildren do not live in HU, who the actual parents of the stepchildren and grandchildren are.)

IO9 CHECKPOINT

See FU listing:

Child present in the FU who is not the child of Head, Wife/"Wife"  
All others

GO TO IO10 CHECKPOINT

IO9. Please tell us how each of the following FU members are related to the Head/Wife/"Wife". Give each person's parents' names and how the parent is related to Head/Wife/"Wife".

IO10 CHECKPOINT

See FU listing:

Husband of Head in FU (RTH 90)  
All others

GO TO IO11

IO10. The Family Listing indicates a Husband of Head in the FU.

♦ If Husband of Head was prelisted, please verify.
♦ Moving in a new Husband of Head or changing an existing FU member to Husband of Head requires study staff permission.
♦ Please verify and give name of study staff persons who gave you permission, and the reason for making this Husband of Head designation.

IO11. Did any prelisted person move out or die and you were unable to indicate this on the Family Listing? This includes those who moved out and set up their own household, moved into another household, or into institutional housing (e.g., college dorm, prison, military housing, or nursing home).

1. Yes  
5. No

IO11a. Please specify the name, sex, birthdate/age, move out date and relationship to Head of each mover out or deceased FU member. As much as possible give details of where this person moved, others living with them, etc.

[Family Listing]  
Question Type: Open End

"IO11a"

IO12. Please elaborate on any information in this interview, that you have not already mentioned, that will help study staff to correct the data.
IO13. Did you make any updates/corrections to any preloaded FU members' first name, last name, or birthdate information? For example, changing maiden name to married name or Respondent correcting our spelling, of a name or birthdate for any FU member.

1. Yes, updates/changes made
5. No, no updates/changes made

IO13a. Please specify which person(s), what information you changed, and the reason why.
Question Type: Open End

IO14. Is there an update/change that should have been made, to an FU member's name, relationship to Head, or birthdate information, that was not? For example, you learned after the Family Listing had been confirmed, that Head's name was spelled wrong, or a son was actually a stepson, or after the Birthdate screen you learned that Wife's year of birth and age are wrong.

1. Yes, change should have been made
5. No, no change needed

IO14a. Please specify which person’s information should be changed/corrected, how it should be changed, and the reason or source of new information.
Question Type: Open End

IO15. Did the Respondent clarify or change an answer that you were unable to go back and correct?

1. Yes, responses need correction
5. No correction needed

IO15a. Please specify which item(s) need correction, for which person and what the correct answer should be.
Question Type: Open End

IO16 CHECKPOINT
See FU listing:

Head is not the Respondent

All others

GO TO IO17 CHECKPOINT

IO16. Are the questions about Head answered with reference to the Head of the FU (not the R)? Is everyone's relationship code to the current Head of this FU (not the R)?

1. Yes, answers about Head and relationships to Head are correct
5. No, some answers/relationships need correction

IO16a. Please specify which answers or relationships need correction and what the correct response should be.
Question Type: Open End
IO17 CHECKPOINT

See FU listing:

- There is a prelisted BF or GF in the FU, or a FUMI BF or GF whose MI date is longer than 1 year before the IW date
- All others

GO TO IO18

IO17.
- [First Name, Last Name] [has been Boyfriend/Girlfriend of Head for more than a year/ the mover-in Boyfriend/Girlfriend of Head has been in the FU for a year or more.]
- Why wasn't he/she made Head/"Wife"?

IO18. Did the R report a job (for any FU member) after it was too late to record it (i.e. after the employment and income sections for that FU member)?

1. Yes
5. No


Question Type: Open End

" IO18a"

IO19. Was a job reported (for any FU Member) for which you later learned the person was not paid (e.g., working in a spouse's business but not receiving payment for services)?

1. Yes
5. No, all the jobs were for pay or no jobs reported

IO19a. Please specify which FU Member was involved, which job, and the circumstances.

Question Type: Open End

" IO19a"

IO22. Is this entire FU currently living in institutional housing — such as a single person FU in military barracks, a health care facility, or college dormitory, or a Head and family living in on-base military housing?

1. Yes
5. No

IO22a. Which type of facility is that?

1. Military
2. Jail
3. Health care
4. College
7. Other (Specify)............

IO22b. Please specify other facility.

Question Type: Enumerated; Range 1-7

" IO22a"

" IO22b"

IO23. Others who can help locate this R:
- Enter name and phone number of friends, neighbors, etc. who helped you locate this R
- Do not include Contacts, Finders, or other panel family members
- Information gained within the body of the interview cannot be used here
- Include employer name and phone number only when given with R's permission to use in contacting him/her
IO24. **SPECIAL CIRCUMSTANCES:**

♦ Please give any information that would help us if we need to recontact this family for any reason, or that would aid next wave's interviewer in contacting this Respondent and conducting the interview.

♦ Interview Circumstances: Indicate unusual family situations; best day/time/place to contact Respondent; uncooperative Respondent; future plans to move, retire, etc.

♦ Special needs or Preferences: Bilingual interviewer needed; other language or hearing problem, Respondent prefers personal interview (give directions to residence).

IO25. Did this Interview have a Problem/Sensitive Interview Code assigned from a previous year indicated in the Profile?

1. Yes
5. No

[IO25a. What was the Problem/Sensitive Interview Code? From what year was it? Does it still apply, or is there a different problem that should be coded?
Question Type: Open End
/" IO25a" ]