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Interview Start

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RECORDEDIW_CONSENT. We sometimes record interviews to help us maintain quality. Your interview may be recorded for quality control purposes. Do you agree for this interview to be recorded?

- If R consents to the RECORDING of this interview, ENTER [1]
- If R does not consent to the RECORDING of this interview, ENTER [5]
- If resuming a suspended interview, RE-READ the consent and ENTER [1] if R consents to recording or [5] if R does not consent to recording

1. Yes, consent given 5. No, consent not given

VOLSTMT. VOLUNTARY STATEMENT: READ to Respondent before the interview begins.

- [SPANUSED=YES: USE Ctrl-L to switch between English and Spanish at any point during the interview.]
Before I begin, I want you to know that this interview is completely voluntary and confidential. In addition, if we come to any question which you don’t want to answer, just let me know and we will go on to the next question. The answers that you give will be kept confidential to the maximum extent allowable under federal and state law.

- ENTER [1] to continue
- If resuming a suspended interview, RE-READ the voluntary statement and ENTER [1] to continue.

1. Continue
Family Listing

TOC

CYFUHU.

PRELISTED FU MEMBER (REINTERVIEW)

[1st ITERATION: In [P2YEAR], we had (you / [CYNAMF CYNAML (CYAQRTH)]) listed as living in this household. (Are you / Is [CYNAMF]) living in this household now? / ALL OTHER ITERATIONS: (In [P2YEAR], we had (you / [CYNAMF]) listed as living in this household.) How about (you / [CYNAMF])? (Are you/ Is [CYNAMF]) living in this household now?)]

PRELISTED FU MEMBER (RECONTACT)

[1st ITERATION: Next, I'd like to know who lives in this household. (Are you/ Is [CYNAMF CYNAML]) living in this household now? / ALL OTHER ITERATIONS: (Next, I'd like to know who lives in this household.) How about (you / [CYNAMF])? (Are you / [CYNAMF]) living in this household now?]

• IF NO, change CYFUHU status as follows:
  “Mover Out” for a person who moved out to another household
  “Died” if person has died
  *Institution* type listed below if person moved to an institution

  1. FU member


PRELISTED INSTITUTIONAL (REINTERVIEW, RECONTACT)

Is [CYNAMF CYNAML] still [incarcerated / in a military facility / in an educational facility / in a health facility / in an institutional facility]?

PRELISTED FU MEMBER (SPLITOFF, RECONSO)

[1st ITERATION: Next, I'd like to know who lives in this household. (Are you/ Is [CYNAMF CYNAML]) living in this household now? / ALL OTHER ITERATIONS: (Next, I'd like to know who lives in this household.) How about (you / [CYNAMF])? (Are you / [CYNAMF]) living in this household now?)]

• IF NO, change CYFUHU status as follows:
  [“Mover In” if person has moved back into the Family Unit]
  “Mover Out” for a person who moved out to another household
  “Died” if person has died
  *Institution* type listed below if person moved to an institution

  4. FU Mover In


NEW FU MEMBERS

[1st ITERATION: Is anyone else living there now who I did not mention, including any newborn children? / ALL OTHER ITERATIONS: Is anyone else living there (who I did not mention,) (including any newborn children)?)]

• IF YES, select and enter CYFUHU status as follows:
  2 "HU Member w/ Own CS” - HU member listed on their own Reinterview CS
  3 "HU Member” - Living in HU, but not a member of this FU
  4 “FU - Mover In” for a new FU Member moved into or born into the Family Unit

• PRESS [Enter] if finished adding family members

  2. HU Member w/Own CS  3. HU Member  4. FU Mover In
CYAQRTH.  [CYFUHU=PYFUHU: VERIFY or update 'CYAQRTH' if you have a new Head or change in marital status of Head. / CYFUHU=HUCS, HU, FUMI: ENTER relationship to current Head. / CYFUHU=6 – 12: DO NOT change 'CYAQRTH' if person moved out, died, or moved to some type of institution.]

101 – 982; RTH Lookup List

CYNAMF.  [CYFUHU=PYFUHU: FOR pre-listed persons, make any name changes indicated by the Respondent. / CYFUHU=HUCS, HU, FUMI: FOR newly listed persons, enter and verify spelling of name.]

String 10

CYNAML.  [CYFUHU=PYFUHU: FOR pre-listed persons, make any name changes indicated by the Respondent. / CYFUHU=HUCS, HU, FUMI: FOR newly listed persons, enter and verify spelling of name.]

- [LOOPS 2-24: Not necessary to confirm spelling of last name if it’s evident that it’s the same as a previous family member]

String 15

GO TO CYFUHU FOR NEXT PERSON; THEN GO TO FAMLISTCONFIRM

FAMLISTCONFIRM.  Is the Family Listing Table complete?

- SELECT "YES" and continue OR go back to Family Listing Table

1. Yes

Movers-In

MOVER-IN RULE: WHETHER ANY FU MEMBER HAS MOVED IN SINCE 1/1/P2YEAR (FU MEMBER W/ IWTYPE=REINT, RECON & CYFUHU=FUMI & PYFUHU<>FUMI)

MOVERS-IN | NO (MORE) MOVERS-IN → GO TO MOVER-OUT RULE
↓

MOVEINMO.  When did [CYNAMF CYNAML] move in?

- SELECT month moved in
- PROBE DK month: Do you know what season it was?


MOVEINYR.  (When did [CYNAMF CYNAML] move in?)

- ENTER year moved in
- PROBE /RR/ Move-In years prior to [P2YEAR]

1901 – [CYEAR]

GO TO MOVER-IN RULE FOR NEXT PERSON; THEN GO TO MOVER-OUT RULE

Movers-Out

MOVER-OUT RULE: WHETHER ANY FU MEMBER MOVED OUT SINCE 1/1/P2YEAR (FU MEMBER W/ IWTYPE=REINT, RECON & PYFUHU=FU & CYFUHU= M_O, JAIL, MILIT, EDUC, HLTH, OTH)

MOVER-OUT | NO (MORE) MOVERS-OUT → GO TO BIRTH RULE
↓
MOVEOUTMO. When did [CYNAMF CYNAML] move out?
- SELECT month moved out
- PROBE DK month: Do you know what season it was?

<table>
<thead>
<tr>
<th>Month</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. January</td>
</tr>
<tr>
<td>2. February</td>
</tr>
<tr>
<td>3. March</td>
</tr>
<tr>
<td>4. April</td>
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<td>5. May</td>
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<td>6. June</td>
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<td>7. July</td>
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<td>8. August</td>
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<tr>
<td>9. September</td>
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<tr>
<td>10. October</td>
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<tr>
<td>11. November</td>
</tr>
<tr>
<td>12. December</td>
</tr>
<tr>
<td>21. Winter</td>
</tr>
<tr>
<td>22. Spring</td>
</tr>
<tr>
<td>23. Summer</td>
</tr>
<tr>
<td>24. Fall</td>
</tr>
</tbody>
</table>

MOVEOUTYR. (When did [CYNAMF CYNAML] move out?)
- ENTER year moved out
- PROBE /RR/ Move-Out years prior to [P2YEAR]

1901 – [CYEAR]
GO TO MOVER-OUT RULE FOR NEXT PERSON; THEN GO TO BIRTH RULE

Birth Dates
BIRTH RULE: LIVING FU MEMBERS (CYFUHU<>DIED)

Living FU Member | NO (More) Living FU Members → Go to Death Rule
↓

CYMOBRN. Now, I would like to check some birthdate information.

[PRELOADED DOB=RESPONSE: VERIFY] We have (your / [CYNAMF CYNAML’s]) birthdate as [CYMOBRN/CYDYBRN/CYRBRN]. Is that correct? / PRELOADED DOB=NONRESPONSE: What is (your / [CYNAMF CYNAML’s]) complete birthdate? / CYFUHU=HUCS, HU, FUMI: And what is (your / [CYNAMF CYNAML’s]) complete birthdate?
- UPDATE or ENTER month

<table>
<thead>
<tr>
<th>Month</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. January</td>
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<tr>
<td>2. February</td>
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<tr>
<td>3. March</td>
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<td>4. April</td>
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<td>5. May</td>
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<td>8. August</td>
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<td>9. September</td>
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<td>10. October</td>
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<tr>
<td>11. November</td>
</tr>
<tr>
<td>12. December</td>
</tr>
</tbody>
</table>

CYDYBRN. ([PRELOADED DOB=RESPONSE: VERIFY] We have (your / [CYNAMF CYNAML’s]) birthdate as [CYMOBRN/CYDYBRN/CYRBRN]. Is that correct? / PRELOADED DOB=NONRESPONSE: What is (your / [CYNAMF CYNAML’s]) complete birthdate? / CYFUHU=HUCS, HU, FUMI: And what is (your / [CYNAMF CYNAML’s]) complete birthdate?)
- UPDATE or ENTER day

1 – 31

CYRBRN. ([PRELOADED DOB=RESPONSE: VERIFY] We have (your / [CYNAMF CYNAML’s]) birthdate as [CYMOBRN/CYDYBRN/CYRBRN]. Is that correct? / PRELOADED DOB=NONRESPONSE: What is (your / [CYNAMF CYNAML’s]) complete birthdate? / CYFUHU=HUCS, HU, FUMI: And what is (your / [CYNAMF CYNAML’s]) complete birthdate?)
- UPDATE or ENTER year

1880 – [CYEAR]

BIRTH2 RULE: WHETHER ANY PART OF BIRTH DATE IS NON-RESPONSE

Cy(MO, DY, YR)BRN IS NONRESPONSE All Others → Go to Birth Rule for Next Living FU Member; Then Go to Death Rule
CYESTAGE. Could you tell me how old (you are/he is/she is)?

- **If necessary:** What is your best estimate?

  1 – 120 [DK/RF]

  ↓

AGEGE16. **VERIFY or ASK:**
Can you tell me if [CYNAMF CYNAML] is age 16 or older?

  1. Yes  5. No [DK/RF NOT ALLOWED]

  GO TO BIRTH RULE FOR NEXT PERSON ; THEN GO TO DEATH RULE

**Death Dates**

DEATH RULE: WHETHER ANY FU MEMBER HAS DIED (CYFUHU=DIED)

<table>
<thead>
<tr>
<th>DECEASED FU MEMBER</th>
<th>NO (MORE) DECEASED FU MEMBERS</th>
<th>→ GO TO MARITAL RULE</th>
</tr>
</thead>
</table>

CYMOBRN. **[1st DECEASED]** You mentioned that [CYNAMF CYNAML] has died. We are sorry for your loss. If I may, I have a few questions about (him/her) at this time. / **ALL OTHERS:** And you mentioned that [CYNAMF CYNAML] has also died. [PRELOADED DOB=RESPONSE: VERIFY] We have [CYNAMF CYNAML’s] birthdate as [CYMOBRN/CYDYBRN/CYRBRN]. Is that correct? / **ALL OTHERS:** What is [CYNAMF CYNAML’s] complete birthdate?

- **UPDATE or ENTER month**


CYDYBRN. ([PRELOADED DOB=RESPONSE: VERIFY] We have [CYNAMF CYNAML’s] birthdate as [CYMOBRN/CYDYBRN/CYRBRN]. Is that correct? / **ALL OTHERS:** What is [CYNAMF CYNAML’s] complete birthdate?)

- **UPDATE or ENTER day**

  1 – 31

CYYRBRN. ([PRELOADED DOB=RESPONSE: VERIFY] We have [CYNAMF CYNAML’s] birthdate as [CYMOBRN/CYDYBRN/CYRBRN]. Is that correct? / **ALL OTHERS:** What is [CYNAMF CYNAML’s] complete birthdate?)

- **UPDATE or ENTER year**

  1880 – [CYEAR]

DEATH2 RULE: WHETHER ANY PART OF BIRTH DATE IS NON-RESPONSE

<table>
<thead>
<tr>
<th>CY(MO, DY, YR)BRN IS NONRESPONSE</th>
<th>ALL OTHERS</th>
<th>→ GO TO BIRTHST</th>
</tr>
</thead>
</table>

CYESTAGE. Could you tell me how old (he was/she was)?

- **If necessary:** What is your best estimate?

  1 – 31 [DK/RF]
BIRTHST. What state was [CYNAMF CYNAML] born in?
- Start typing the name of the State to bring up the look-up list
- If foreign country, ENTER [FOR] to select “Foreign Country”

String 25; State Lookup List

CYMODTH. And what was (his/her) date of death?
- ENTER month

CYDYDTH. (And what was (his/her) date of death?)
- ENTER day
  1 – 31

CYYRDTH. (And what was (his/her) date of death?)
- ENTER year
  1901 – [CYEAR]

DEATHST. What state was [CYNAMF CYNAML] residing in at the time of (his/her) death?
- Start typing the name of the State to bring up the look-up list
- If foreign country, ENTER [FOR] to select “Foreign Country”

String 25; State Lookup List

Marital Status

MARITAL RULE: WHETHER ANY PERSON IS FU OR FUMI (CYFUHU=FU, FUMI) AND IS 13+ YEARS OLD

12+ YR OLD FU MEMBER NO (MORE) 12+ YR OLD FU MEMBERS → GO TO MSCONFIRM

↓

MARITAL. What is (your/[CYNAMF CYNAML’s]) current marital status?
(Are you/[Is he / Is she]) married, widowed, divorced, separated, or (have you/[has he / has she]) never been married?
- If R says Single, PROBE: Does that mean (you are/[he is / she is]) widowed, divorced, separated, or (have you/[has he / has she]) never been married?


↓

GO TO MARITAL RULE FOR NEXT PERSON; THEN GO TO MSCONFIRM

SPOUNAME. [H/W/"W": VERIFY spouse name - Ask R only if you are unclear about the answer: What is (your/[CYNAMF CYNAML’s]) spouse’s name? / ALL OTHERS: What is (your/[CYNAMF CYNAML’s]) spouse’s name?]

String 20

GO TO MARITAL RULE FOR NEXT PERSON; THEN GO TO MSCONFIRM

MSCONFIRM. Is the Marital Status Information Table complete?
- SELECT "YES" and continue OR go back to Marital Status Information Table

1. Yes
HU/CS RULE: WHETHER ANY PERSON IS HU/CS (CYFUHU=2) OR HU (CYFUHU=3)

HU/CS MEMBER → GO TO HUCS_ID
HU MEMBER → NO (MORE) HU/CS MEMBERS → GO TO MOHHGRP RULE

HURREASON. SELECT reason(s) why [CYNAMF CYNAML] is not included in this FU.

- ENTER all that apply

1. Has own Coversheet (HU/CS) –
   Warning: FuHu Status will be permanently changed from HU to HUCS
2. Living with this FU only temporarily
3. Roommate (not related to FU, living in HU as roommate)
4. Refused to be included in the Interview

GO TO HU/CS RULE FOR NEXT PERSON; THEN GO TO MOHHGRP RULE

HUCS_ID. REFER to the Family Listing sheet for this 68ID
- ENTER the Sample IDs of all other FU(s) living in this household

MOHHGRP RULE: WHETHER ANY FU MEMBER MOVED OUT SINCE 1/1/P2YEAR (FU MEMBER W/ IWTYPE=REINT, RECON & PYFUHU=FU & CYFUHU= M_O, JAIL, MILIT, EDUC, HLTH, OTH)

MOVERS-OUT → NO (MORE) MOVERS-OUT → GO TO INST RULE

MOHHGRP1. Mover-Out Household Grouping 1

1 MOVER-OUT:
   Only one person with ‘Follow Status = Yes’ has moved out of the FU.
   - SELECT that person as “MOHHGrp1” and [ENTER] to continue

2 MOVERS-OUT:
   The following people moved out or are no longer living with (you/the family):
   - READ first and last names from answer list below.
   Do these two people now live together in the same household? (Which of these people now live together?)
   - IF YES: Select these two people into the first grouping (MOHHGrp1), then [ENTER] to continue
   - IF NO: Select each person into their own individual groupings (MOHHGrp1, MOHHGrp2)

3+ MOVERS-OUT:
   The following people moved out or are no longer living with (you/the family):
   - READ first and last names from answer list below.
   Do any of these [X] people live together in the same household? (Which of these people now live together?)
   - IF YES: Select all persons mentioned into the first grouping (MOHHGrp1), then [ENTER] to continue
   - IF NO: Select each person into their own individual groupings (MOHHGrp1, MOHHGrp2, etc.)

1 – 24. [CYNAMF CYNAML] [(FS=Yes)] AQSN list of FU Members w/FUHU=MO

2+ MOVERS-OUT AND 1 MOVER-OUT LEFT:
Only one Mover-Out remains
• SELECT that person as “MOHHGrp[2 / 3 / 4 / 5 / 6 / 7 / 8]” and [ENTER] to continue

2+ MOVERS-OUT AND >1 MOVER-OUT LEFT:
Do (any of) the other people who moved out now live together?
• IF NECESSARY: READ first and last names from answer list below.
• IF YES: Select all persons mentioned into “MOHHGrp[2 / 3 / 4 / 5 / 6 / 7 / 8]”, then [ENTER] to continue
• IF NO: Select each person into their own individual groupings (MOHHGrp2, MOHHGrp3, etc.)

[1 – 24. [CYNAMF CYNAML] [[FS=Yes]]] AQS list of FU members w/FUHU=MO

MOHHGRP2 RULE: WHETHER ONLY ONE MOVER-OUT SELECTED FOR THIS MOHHGRP

ONE MOVER-OUT SELECTED → GO TO MOHHGRP3 RULE
2+ MOVERS-OUT SELECTED

SPLITOFFR[1-8]. SELECT one adult as probable Respondent for this household.
• IF there are no adults listed, SELECT oldest child with “FS = YES”

[1 – 24. [CYNAMF CYNAML], Age [AGEIWDATE] [[FS=Yes]]] AQS list of FU Members selected at MOHHGRP

MOHHGRP3 RULE: WHETHER THERE ARE MORE MOVERS-OUT TO BE ASSIGNED TO A MOHHGRP

MORE MOVERS-OUT → GO TO MOHHGRP RULE FOR NEXT PERSON;
THEN GO TO SPLITOFF RULE
NO MORE MOVERS-OUT

SPLITOFF RULE: WHETHER MOHHGRP HAS SAMPLE FU MEMBER (FS=YES) WHO IS YOUNGER THAN 16 YEARS OLD (AGEIWDATE<16) OR IS 16+ YEARS OLD (AGEIWDATE>15)

[ONLY ONE 16+ SAMPLE FU MEMBER]
OR (SPLITOFFR=FU MEMBER 16+)
→ GO TO MOINCO

[ONLY ONE SAMPLE FU MEMBER IS <16] OR (SPLITOFFR=FU MEMBER <16)

SOCHLIVE.PERSNAMF. Who is [CYNAMF CYNAML] living with now?
String 10

SOCHLIVE.PERSNAML. (Who is [CYNAMF CYNAML] living with now?)
String 15

SOCHLIVE.PERSRTCH. What is (his/her) relationship to [CYNAMF CYNAML]?
String 100
Mover-Out Address

MOINCO. Address Update for * Mover Out *

M_O OR SPLITOFFR<16 YRS OLD

Can you give me [CYNamF CYNamL]'s new address, I mean the address of the person with whom (he/she) is now living? Is there an "in care of" for the address?

ALL OTHERS

Can you give me [CYNamF CYNamL]'s new address? Is there an "in care of" for the address?

- ATTACH comment to any item using [F2]
- If none, PRESS [Enter] to continue

MOADDR1. Address Update for * Mover Out *

M_O OR SPLITOFFR<16 YRS OLD

What is the street address?

- ATTACH comment to any item using [F2]
- If there is a street address and a PO Box, ENTER PO Box here (ENTER street address in the Address 2 field)

MOAPTSTE. Address Update for * Mover Out *

M_O OR SPLITOFFR<16 YRS OLD

(Is there an apartment or suite number?)

- ATTACH comment to any item using [F2]
- If none, PRESS [Enter] to continue

MOADDR2. Address Update for * Mover Out *

M_O OR SPLITOFFR<16 YRS OLD

(What is the street address?)

- ATTACH comment to any item using [F2]
- If there is a street address and a PO Box, ENTER street address here (ENTER PO Box in Address 1 field)
- If none, PRESS [Enter] to continue

MOCITY. Address Update for * Mover Out *

M_O OR SPLITOFFR<16 YRS OLD

What is the City?

- ATTACH comment to any item using [F2]

MOSTATE; MOSTATEABBREV. Address Update for * Mover Out *

M_O OR SPLITOFFR<16 YRS OLD

What is the State?

- ATTACH comment to any item using [F2]
- Start typing the name of the State to bring up the look-up list
- If foreign country, ENTER [FOR] to select “Foreign Country”

String 20; String 4; State Lookup List. State  Foreign Country  DK/RF  → GO TO MOPHONE
### MOZIP. Address Update for * Mover Out *

- M_O OR SPLITOFFR<16 YRS OLD: SplitOff Child, [CYNamF CYNamL], is living with [PersNamF PersNamL]

**What is the Zip code?**
- ATTACH comment to any item using [F2]
- If foreign country, ENTER all [0]'s

---

### MOCOUNTRY; MOCOUNTRYABBR. Address Update for * Mover Out *

- M_O OR SPLITOFFR<16 YRS OLD: SplitOff Child, [CYNamF CYNamL], is living with [PersNamF PersNamL]

**If other than USA: What is the Country?**
- ATTACH comment to any item using [F2]
- Start typing the name of the Foreign Country to bring up the look-up list

---

### MOPHONE. Address Update for * Mover Out *

- M_O OR SPLITOFFR<16 YRS OLD: SplitOff Child, [CYNamF CYNamL], is living with [PersNamF PersNamL]

**What is the area code and telephone number?**
- ATTACH comment to any item using [F2]
- If foreign phone, ENTER all [0]'s and put foreign number in next field

**ALL OTHERS**

---

### MOPHONE. Address Update for * Mover Out *

- M_O OR SPLITOFFR<16 YRS OLD: SplitOff Child, [CYNamF CYNamL], is living with [PersNamF PersNamL]

**What is the area code and telephone number with any extension?**
- ATTACH comment to any item using [F2]
- Enter foreign phone number in this field
- If none, PRESS [Enter] to continue

---

### MOPHTYPE. Address Update for * Mover Out *

- M_O OR SPLITOFFR<16 YRS OLD: SplitOff Child, [CYNamF CYNamL], is living with [PersNamF PersNamL]

**Is this a home phone, work phone, cell phone, or what?**

1. Home phone or residence  
2. Work phone  
3. Cell phone  
4. Pager  
5. Fax  
6. VoIP  
7. Other-specify (MOPHTYPESPEC. Specify (String 50))

---

### MOEMAIL RULE: WHETHER MOHHGRP HAS SAMPLE FU MEMBER (FS=YES) WHO IS YOUNGER/OLDER THAN 16 YEARS OLD

- (ONLY ONE 16+ SAMPLE FU MEMBER) OR (SPLITOFFR=FU MEMBER 16+)
- (ONLY ONE SAMPLE FU MEMBER <16) OR (SPLITOFFR=FU MEMBER <16) → GO TO SOCHOTHFU. DIFFPANFU

---

### MOEMAIL. Address Update for * Mover Out *

**Is there an e-mail address where we can contact [CYNAMF CYNAML]?**

1. Yes  
5. No → GO TO SOMARSTAT.SOMARST

---

### MOEMAILADDR. Address Update for * Mover Out *

**Is that e-mail address?**
- ENTER email address, then READ BACK and VERIFY with Respondent

String 50
SOMARSTAT.SOMARST. Is [he / she] married, widowed, divorced, separated, or never married?


↓

GO TO SOMARSTAT.LIVOWNHH

SOMARSTAT.SPOUNAMF. What is [his wife’s / her husband’s] name?

String 20

SOMARSTAT.SPOUNAML. (What is [his wife’s / her husband’s] name?)

String 25

SOMARSTAT.LIVOWNHH. Have they set up their own household, have they moved in with another FES (Family Economics Study) family, or have they moved in with a family not in FES?

- BY ‘Set up their own household’, we mean they are financially independent.
- IF R says “Living with someone else”, PROBE: Is that with another FES (Family Economics Study) family, a family not in FES, or have they set up their own household?

1. Yes, set-up own household

GO TO SPLITOFF RULE FOR NEXT MOHHGRP; THEN GO TO INST RULE

2. Moved to a household not in study

GO TO SOMARSTAT. PERSNAMF

3. Moved to an institution (military, education, health, other institution)

↓

GO TO SOMARSTAT. PERSNAMF

LIVOWNHH HARD CHECK (CLOSE= LIVOWNHH; GOTO=FAMILY LISTING)

IF LIVOWNHH=3 AND CYFUHU=MOVER-OUT:

You have selected "Moved to an institution" which is not valid for a FU Member who has been coded as Mover-Out in the family listing.
If this FU Member is not a Mover-out, select GOTO to go back to the family listing and enter the correct FU/HU code.

SOMARSTAT.PERSNAMF. Who is [CYNAMF CYNAML] living with now?

String 10

SOMARSTAT.PERSNAML. (Who is [CYNAMF CYNAML] living with now?)

String 15

SOMARSTAT.PERSRTCH. What is (his/her) relationship to [CYNAMF CYNAML]?

String 100

SOCHOTHFU RULE: WHETHER MOHHGRP MOVED TO ANOTHER PSID FAMILY (LIVOWNHH=4)

MOVED TO PSID FAMILY  ALL OTHERS  → GO TO SPLITOFF RULE FOR NEXT MOHHGRP; THEN GO TO INST RULE

↓

SOCHOTHFU.SIDMOVE. ENTER Sample ID of the family unit into which [CYNAMF CYNAML] has moved.

String 7

GO TO SPLITOFF RULE FOR NEXT MOHHGRP; THEN GO TO INST RULE
SOCHOTFU.DIFPANFU. Has SplitOff moved to another household in the Family Economics Panel Study?
- CHECK Family Listing Sheets for this 68ID

1. Yes, moved to another FU in study
5. No, moved to a household not in the study

↓
GO TO SPLITOFF RULE FOR NEXT MOHHGRP;
THEN GO TO INST RULE

SOCHOTFU.SIDMOVE. ENTER Sample ID of the family unit into which [CYNAMF CYNAML] has moved.

String 7
GO TO SPLITOFF RULE FOR NEXT MOHHGRP; THEN GO TO INST RULE

Institutional Address
INST RULE: WHETHER ANY FU MEMBER MOVED TO INSTITUTION (CYFUHU=JAIL, MILIT, EDUC, HLTH, OTH)

<table>
<thead>
<tr>
<th>INSTITUTIONALS</th>
<th>NO (MORE) INSTITUTIONALS</th>
<th>→ GO TO RSELECT</th>
</tr>
</thead>
</table>

Can you give me [CYNAMF CYNAML]’s address and phone number? Is there an "in care of" for the address?
- If none, PRESS [Enter] to continue

String 40

(What is the street address?)
- ATTACH comment to any item using [F2]
- If there is a street address and a PO Box, ENTER PO Box here (ENTER street address in the Address 2 field)

String 40

(Is there an apartment or suite number?)
- ATTACH comment to any item using [F2]
- If none, PRESS [Enter] to continue

String 10

(What is the street address?)
- ATTACH comment to any item using [F2]
- If there is a street address and a PO Box, ENTER street address here (ENTER PO Box in Address1 field)
- If none, PRESS [Enter] to continue

String 40
What is the City?
• ATTACH comment to any item using [F2]

String 40

What is the State?
• ATTACH comment to any item using [F2]
• Start typing the name of the State to bring up the look-up list
• If foreign country, ENTER [FOR] to select “Foreign Country”

String 20; String 4; State Lookup List. State

What is the Zip code?
• ATTACH comment to any item using [F2]
• If foreign country, ENTER all [0]'s

String 10; all 8's/9's not allowed

INSTCOUNTRY; INSTCOUNTRYABBREV Address Update for [CYFUHU=9: Institutional *Military* / CYFUHU=10: Institutional *Education* / CYFUHU=11: Institutional *Health* / CYFUHU=12: Institutional *Other*]
If other than USA: What is the Country?
• ATTACH comment to any item using [F2]
• Start typing the name of the Foreign Country to bring up the look-up list

String 30; String 2; Country Lookup List

What is the area code and telephone number?
• ATTACH comment to any item using [F2]
• If foreign phone, ENTER all [0]'s and put foreign number in next field

ALL OTHERS ALL 8’s/9’s NOT ALLOWED

(What is the area code and telephone number) with any extension?
• ATTACH comment to any item using [F2]
• Enter foreign phone number in this field
• If none, PRESS [Enter] to continue

String 20

Is this a home phone, work phone, cell phone, or what?
• ATTACH comment to any item using [F2]

5. Fax 6. VoIP 7. Other-specify (INSTPHTYPESPEC. Specify (String 50))
INSTEMAIL RULE: WHETHER INSTITUTIONAL IS 16+ YEARS OLD (AGEIWDATE>15)

<table>
<thead>
<tr>
<th>INSTITUTIONAL IS 16+</th>
<th>ALL OTHERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>→ GO TO INST RULE FOR NEXT PERSON; THEN GO TO RSELECT</td>
<td></td>
</tr>
</tbody>
</table>


Is there an e-mail address where we can contact [CYNAMF CYNAML]?

1. Yes 5. No → GO TO INST RULE FOR NEXT PERSON; THEN GO TO RSELECT


(What is that e-mail address?)

- ENTER email address, then READ BACK and VERIFY with Respondent
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 50

Respondent Selection and Final Confirmation

RSELECT. SELECT Respondent from list of FU Members below or enter Code 97 for Proxy Respondent

- NOTE: Proxy Respondent is any person who is not a member of this FU

1 – 24. [CYNAMF CYNAML, CYAQRTH, CYFUHU] AQS\text{\textit{\textup{N list of FU Members w/FUHU=FU, FUMI and AGE=16+}}}

97. Proxy Respondent-Specify (RSELECTSPEC. Please specify relationship to Head and the Proxy’s name (String 100))

FUFINALCONFIRM. Review the family listing with Respondent. If necessary, go back to make changes. Once past this screen, you will not be able to go back to the Family Listing

Respondent: [NAME]
RTH: [CYAQRTH]
FuHu: [CYFUHU]
1 – 24. [CYNAMF CYNAML, CYAQRTH, CYFUHU, MARITAL, Birthdate: CYBRN, Age: AGEIWDATE] (AQS\text{\textit{\textup{N list of FU Members w/FUHU=FU, FUMI, INST}}}

- ENTER [1] to confirm family listing and continue

1. Confirm
Section A: Housing, Utilities, Computer Use

TOC

A3CKPT. CAI CHECKPOINT: WHETHER RESPONDENT IS HEAD OR WIFE/"WIFE" (RESPONDENT=1, 2, 3)

1. R = HEAD/WIFE/"WIFE” 5. ALL OTHERS → GO TO A4

A3. Please think about your life-as-a-whole. How satisfied are you with it? Are you completely satisfied, very satisfied, somewhat satisfied, not very satisfied, or not at all satisfied?


4. Not very satisfied 5. Not at all satisfied

A4. Do [R=FU MEMBER: you / R=PROXY: they] live in a one-family house, a two-family house, an apartment, a mobile home, or what?

- IF R answers “condo,” PROBE for type of dwelling

1. One-family 2. Two-family; duplex 3. Apartment; project 4. Mobile home; trailer

6. Row house; town house 7. Other-specify (AASPEC. Please specify. (String 100))

A5CKPT. CAI CHECKPOINT: WHETHER HEAD OR WIFE/"WIFE" IS 55 YEARS OLD OR OLDER (AGEIWDATE≥55)

1. HEAD OR WIFE/"WIFE” IS 55+ YEARS OLD 5. ALL OTHERS → GO TO A8

A6A. Some places require at least one family member to be 55 years or older. Is the place [R=FU MEMBER: you / R=PROXY: they] live like that?

1. Yes 5. No → GO TO A8

↓

A7A RULE: WHETHER FU LIVES IN APARTMENT/PROJECT (A4=3) OR OTHER (A4=7)

APARTMENT/PROJECT OR OTHER  ALL OTHERS → GO TO A8

A7A. Sometimes places offer services that help with daily activities, such as help with bathing or dressing, group meals, or handling medications. Does the place [R=FU MEMBER: you / R=PROXY: they] live offer services like that?

1. Yes 5. No


- [HU/CS IN FU: Remind R not to include rooms used by HU or HUCS people]

ENTER [1-19] for Actual number of rooms

ENTER [20] for Twenty or more rooms

ENTER [0] if FU shares a one-room HU with non-FU persons

0 – 20
A19. Do [R=FU MEMBER: you / CYEAR FU COUNT>1: or anyone else in your family living there] / R=PROXY: they [CYEAR FU COUNT>1: or anyone else in the family living there] own the [A4=APT: apartment / A4=MOBILE: mobile home / ALL OTHERS: home], pay rent, or what?

- If R says “coop, cooperative”, PROBE: Are [you / they] a shareholder - do [you/they] have a purchase agreement - in the cooperative, or do [you / they] have a lease agreement?
  - If SHAREHOLDER/PURCHASE agreement or Don’t Know, ENTER [1]
  - If LEASE agreement, ENTER [5]

1. Any FU member owns or is buying (fully or jointly)  5. FU pays rent  8. FU neither owns nor rents  DK/RF NOT ALLOWED

GO TO A31  GO TO A34

A20. Could you tell me what the present value of [R=FU MEMBER: your / R=PROXY: their] [A4=APT: apartment / A4=MOBILE: mobile home / ALL OTHERS: house] is [A4=MOBILE: including the value of the lot if [R=FU MEMBER: you / R=PROXY: they] own the lot] - I mean about how much would it bring if [R=FU MEMBER: you / R=PROXY: they] sold it today?

$ 0 – 9,999,997 → GO TO A20F RULE  DK/RF

A20A. Would it amount to $100,000 or more?

1. Yes  5. No  DK/RF → GO TO A20F RULE

A20B. (Would it amount to)

$200,000 or more?

1. Yes  5. No  DK/RF → GO TO A20F RULE

A20D. (Would it amount to)

$75,000 or more?

1. Yes  5. No  DK/RF → GO TO A20F RULE

A20C. (Would it amount to)

$400,000 or more?

1. Yes  5. No  DK/RF → GO TO A20F RULE

A20E. (Would it amount to)

$25,000 or more?

1. Yes  5. No  DK/RF → GO TO A20F RULE

A20F RULE: WHETHER FU LIVES IN MOBILE HOME (A4=4)

FU LIVES IN MOBILE HOME  ALL OTHERS → GO TO A21

A20F. Do [R=FU MEMBER: you / R=PROXY: they] rent the lot (where [R=FU MEMBER: you / R=PROXY: their] mobile home is located)?

1. Yes  5. No → GO TO A21

A20G. How much do [R=FU MEMBER: you / R=PROXY: they] pay to rent the lot?

- ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)

$ 0 – 99,997  DK/RF → GO TO A20H

↓
The amount entered is: [A20G] per ____

- SELECT the unit of time below

  3. Week  4. Two weeks  5. Month  6. Year

  7. Other-specify (A20GPERSPEC. Specify. (String 100))

A20H. Does [A20G=DK/RF: the lot rent / ALL OTHERS: this amount] include water and sewer?

1. Yes  5. No

A21. About how much are [R=FU MEMBER: your / R=PROXY: their] total yearly property taxes, including city, county, and school taxes?

$ 0 – 99,997

A22. How much is [R=FU MEMBER: your / R=PROXY: their] total yearly homeowner’s insurance premium?

$ 0 – 9,997

Mortgage Block

A23. Do [R=FU MEMBER: you / R=PROXY: they] have a mortgage or loan on this property?

1. Yes: Mortgage, land contract, home equity loan, etc.  5. No  → GO TO A37A

↓

A23A. [1ST MTGE: Is that a mortgage, a land contract, a home equity loan, or what? / 2ND MTGE: For the second mortgage, what type of loan is that?]


↓

5. Line of credit loan

  7. Other-specify (A23ASPEC. Please specify. (String 100))

GO TO A24

A23B. Is that the original loan and terms, or have [R=FU MEMBER: you / R=PROXY: they] refinanced?

1. Original  2. Refinance

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

$ 0 – 9,999,997

A25. How much are [R=FU MEMBER: your / R=PROXY: their] monthly loan payments?

$ 0 – 99,997

A25A1. Does this amount include property taxes?

1. Yes  5. No

A25A2. Does it (this mortgage or loan payment) include insurance premiums?

1. Yes  5. No
A25A3. Is the interest rate on that mortgage or loan fixed or variable?

1. Fixed  2. Variable

A25A4. What is the current interest rate on that loan?

- ENTER the whole number portion and then ENTER the fraction portion at go to the next screen.

\[0 \to 24\] \[25 \to 65\] \rightarrow A25A4 SOFT CHECK. IF A25A4 = 25+:  
- You have entered interest rate = \([A25A4]\)%  
- If this is not correct, go back to A25A4 and enter correct amount.  
- If this is correct, click [SUPPRESS] to continue.

A25B. (What is the current interest rate on that loan?)

- The whole number amount entered is: \([A25A4]\). ___%
- SELECT the fraction portion of the mortgage rate below

0. \([A25A].0\) 
1. \([A25A] 1/8\) or \([A25A].125\) 
2. \([A25A] 1/4\) or \([A25A].25\) 
3. \([A25A] 3/8\) or \([A25A].375\) 
4. \([A25A] 1/2\) or \([A25A].5\) 
5. \([A25A] 5/8\) or \([A25A].625\) 
6. \([A25A] 3/4\) or \([A25A].75\) 
7. \([A25A] 7/8\) or \([A25A].875\) 
8. Other-specify (A25BSPEC. Please specify. (String 100))

A26. What year did [R=FU MEMBER: you / R=PROXY: they] [A23B=REFINANCED: refinance / ALL OTHERS: obtain that loan]?

1901 – [CYEAR]

A27. About how many more years will [R=FU MEMBER: you / R=PROXY: they] have to pay on it?

1 – 97

A27A. [1st MTGE: Some people have had difficulties recently making their mortgage or loan payments. / 2nd MTGE: (Some people have had difficulties recently making their mortgage or loan payments.)] Are [R=FU MEMBER: you [CYEAR FU COUNT>1: or anyone in your family living there] / R=PROXY: they [CYEAR FU COUNT>1: or anyone in the family living there]], currently behind on [R=FU MEMBER: your / R=PROXY: their] [A23A=MORTGAGE: mortgage / ALL OTHERS: loan] payments [2nd MTGE: (for this [A23A=MORTGAGE: mortgage / ALL OTHERS: loan])]?  

1. Yes  5. No → GO TO A27F

↓

A27B. How many months are [R=FU MEMBER: you / R=PROXY: they] behind?

1 – 97

A27C. Has [R=FU MEMBER: your / R=PROXY: their] bank or lender started the process of foreclosing on [R=FU MEMBER: your / R=PROXY: their] home?

1. Yes  5. No → GO TO A27F
A27D. In what month and year did the foreclosure start?

- SELECT Month and [Enter] to go to next screen for year
- IF NECESSARY: What would be your best estimate?


A27E. (In what month and year did the foreclosure start?)

[217D], _____


A27F. Have [R=FU MEMBER: you / R=PROXY: they] worked with [R=FU MEMBER: your / R=PROXY: their] bank or lender to restructure or modify [R=FU MEMBER: your / R=PROXY: their] [A23A=MORTGAGE: mortgage / ALL OTHERS: loan] [A27A=YES: because of missed payments]?

1. Yes 5. No

A27G. How likely is it that [R=FU MEMBER: you / R=PROXY: they] [A27F1=YES: will continue to be behind / ALL OTHERS: will fall behind] on [R=FU MEMBER: your / R=PROXY: their] [A23A=MORTGAGE: mortgage / ALL OTHERS: loan] payments in the next 12 months? Would you say very likely, somewhat likely, or not likely at all?

1. Very likely 3. Somewhat likely 5. Not likely at all

A28. Do [R=FU MEMBER: you / R=PROXY: they] also have a second mortgage on this property?

1. Yes → REPEAT A23A-A27G; MAX=2; 5. No → GO TO A37A

THEN GO TO A37A

End Mortgage Block

Renters Block (A19=5)
A31 RULE: WHETHER OWNS (A19=1), RENTS (A19=5) OR NEITHER OWNS NOR RENTS (A19=8)

FU PAYS RENT ALL OTHERS → GO TO A34 RULE

A31. About how much rent do [R=FU MEMBER: you / R=PROXY: they] pay a month [A4=MOBILE;], including rent for the lot]?

- [HU/CS IN FU: IF FU lives with non-FU members, PROBE: Is that only for [R=FU MEMBER: your / R=PROXY: their] (FU’s) share of the rent?]
- [FU LIVES IN MOBILE HOME: IF FU owns the lot, do not include the value of the lot]
- ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)

$ 1 – 99,997 DK/RF → GO TO A31C RULE

↓
A31PER. The rent amount entered is: [A31] per _____

- SELECT the unit of time below

  3. Week  4. Two weeks  5. Month  6. Year  7. Other-specify (A31PERSPEC. Specify. (String 100))

A31A RULE: WHETHER FU LIVES IN MOBILE HOME (A4=4)

  FU LIVES IN MOBILE HOME  ALL OTHERS → GO TO A31B

A31A. Does [A31=DK/RF: the rent / ALL OTHERS: this amount] include water and sewer?

  1. Yes  5. No

A31B. Is this [A4=APT: apartment / A4=MOBILE: mobile home / ALL OTHERS: house] rented fully furnished?

  1. Yes  5. No

A31C. Is heating included in [R=FU MEMBER: your / R=PROXY: their] monthly rent?

  1. Yes  5. No

A32. Is this [A4=APT: apartment / A4=MOBILE: mobile home / ALL OTHERS: house] in a public housing project, that is, is it owned by a local housing authority or other public agency?

  1. Yes → GO TO A37A  5. No

  ↓

A33. Are [R=FU MEMBER: you / R=PROXY: their] paying lower rent because a Federal, State, or local government housing program is paying part of the cost?

  1. Yes  5. No if R says “does not pay a lower rent”

End Renters Block

Neither Owns Nor Rents Block (A19=8)

A34 RULE: WHETHER OWNS (A19=1), RENTS (A19=5) OR NEITHER OWNS NOR RENTS (A19=8)

    FU NEITHER OWENS NOR RENTS  ALL OTHERS → GO TO A37A

A34. How is that? (Could you tell me a little more about [R=FU MEMBER: your / R=PROXY: their] situation?)

  String 400

A35. How much would it rent for if it were rented?

- [HU/CS IN FU: IF FU lives with non-FU members, PROBE: Would that be only for [R=FU MEMBER: your / R=PROXY: their] [FU’s] share of the rent?]
- ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)

  $ 1 – 9,997  DK/RF → GO TO A36

↓
A35PER. The rent amount entered is: [A35] per ____

- SELECT the unit of time below


A36. Is this [A4=APT: apartment / A4=MOBILE: mobile home / ALL OTHERS: house] in a public housing project, that is, is it owned by a local housing authority or other public agency?

1. Yes → GO TO A37A 5. No

↓

A37. Are [R=FU MEMBER: you / R=PROXY: they] paying no rent because a Federal, State, or local government housing program is paying all of it?

1. Yes 5. No

End NONR Block

A37A. [A27C=YES: Other than the foreclosure experience we just talked about, since / A27C<>YES: Since] [REINT: our last interview in [P2YEAR] / PYIWDATE=RESPONSE: ([PYIWDATE]), / RECON: our last interview in [P4YEAR] / PYIWDATE=RESPONSE: ([PYIWDATE]), / SO, RECSO: January 1, 2001,] [have / has] [R=FU MEMBER: you] [CYEAR FU COUNT>1: or anyone in your family living there] / R=PROXY & CYEAR FU COUNT=1: they / R=PROXY & CYEAR FU COUNT>1: anyone in the family living there] had a home on which a foreclosure was started?

1. Yes 5. No → GO TO A42

↓

A37B. In what month and year did the foreclosure start?

- SELECT Month and [Enter] to go to next screen for year

- IF NECESSARY: What would be your best estimate?


A37C. (In what month and year did the foreclosure start?) [A37B], _______


A37D. Was the home foreclosed upon?

1. Yes 5. No → GO TO A37F

↓

A37E. Did [R=FU MEMBER: you / R=PROXY: they] lose [R=FU MEMBER: your / R=PROXY: their] home as a result of this foreclosure?

1. Yes 5. No

A37F. Was this home [R=FU MEMBER: your / R=PROXY: their] main residence, investment property, a vacation home or what?

1. Main residence 2. Investment property 3. Vacation home / condo

7. Other-specify (A37FSPEC. Please specify. (String 255))
A37G. About how much did [R=FU MEMBER: you / R=PROXY: they] still owe on [R=FU MEMBER: your / R=PROXY: their] mortgage or loan when the foreclosure started?

$1 – 9,999,997

A37H. Since [REINT: our last interview in [P2YEAR] [PYIWDATE=RESPONSE: ([PYIWDATE])], / RECON: our last interview in [P4YEAR] [PYIWDATE=RESPONSE: ([PYIWDATE])], / SO, RECSO: January 1, 2001,] was there another home that [R=FU MEMBER: you [CYEAR FU COUNT>1: or anyone in your family living there] / R=PROXY & CYEAR FU COUNT>1: they / R=PROXY & CYEAR FU COUNT>1: anyone in the family living there] owned on which a foreclosure was started?

1. Yes → REPEAT A37B-A37G; MAX=2; THEN GO TO A42

5. No

A42. The next few questions are about [R=FU MEMBER: you / R=PROXY: their] utilities for [R=FU MEMBER: your / R=PROXY: their] [apartment / mobile home / home]. Do [R=FU MEMBER: you [CYEAR FU COUNT>1: and your family living there] / R=PROXY: they [CYEAR FU COUNT>1: and their family living there]] get one bill for electricity and gas or other types of fuel? If Yes: Would you be able to separate those amounts?

- ENTER [5] for “does not use gas”, “utilities included in rent”

1. Yes, one bill and R can report separate amounts
2. Yes, one bill but R cannot report separate amounts
5. No, not on one bill

DK/RF

↓

GO TO A42C

↓

A42A. How much do [R=FU MEMBER: you [CYEAR FU COUNT>1: and your family living there] / R=PROXY: they [CYEAR FU COUNT>1: and their family living there]] usually pay for gas or other types of fuel (for your [A4=A PT: apartment / A4=MOBILE: mobile home / ALL OTHERS: home]) per month on average?

- [HU/CS IN FU: Remind R not to include amounts paid by HU or HUCS people]
- ENTER amount here, then SELECT unit of time on next screen (Month, Year)

$0 → GO TO A42B

$1 – 9,997 → GO TO A42B

DK/RF

↓

A42APER. The amount entered is: [A42A] per ____

- SELECT the unit of time below

5. Month
6. Year
7. Other-specify (A42APERSPEC. Please specify. (String 100))

A42B. (How much do [R=FU MEMBER: you [CYEAR FU COUNT>1: and your family living there] / R=PROXY: they [CYEAR FU COUNT>1: and their family living there]] usually pay...) For electricity per month?

- [HU/CS IN FU: Remind R not to include amounts paid by HU or HUCS people]
- ENTER amount here, then SELECT unit of time on next screen (Month, Year)

$0 → GO TO A43 RULE

$1 – 9,997 → GO TO A43 RULE

DK/RF

↓

A42BPER. The amount entered is: [A42B] per ____

- SELECT the unit of time below

5. Month
6. Year
7. Other-specify (A42BPERSPEC. Please specify. (String 100))

GO TO A43 RULE
A42C. How much do [R=FU MEMBER: you [CYEAR FU COUNT>1: and your family living there] / R=PROXY: they [CYEAR FU COUNT>1: and their family living there]] usually pay for these (electricity and gas or other types of fuel) combined?

- [HU/CS IN FU: Remind R not to include amounts paid by HU or HUCS people]

  ENTER amount here, then SELECT unit of time on next screen (Month, Year)

  $0 → GO TO A43 RULE
  $1 – 9,997 DK/RF → GO TO A43 RULE

A42C PER. The amount entered is: [A42C] per

- SELECT the unit of time below

  5. Month  6. Year  7. Other-specify (A42C PERSPEC. Please specify. (String 100))

A43 RULE: WHETHER SEWER/WATER INCLUDED IN MOBILE HOME RENT (A20H=YES OR A31A=YES)

SEWER/WATER INCLUDED → GO TO A44

ALL OTHERS → GO TO A44

A43. (How much do [R=FU MEMBER: you [CYEAR FU COUNT>1: and your family living there] / R=PROXY: they [CYEAR FU COUNT>1: and their family living there]] usually pay...) For water and sewer per month?

- [HU/CS IN FU: Remind R not to include amounts paid by HU or HUCS people]

  ENTER amount here, then SELECT unit of time on next screen (Quarter, Month, Year)

  $0 → GO TO A44
  $1 – 9,997 DK/RF → GO TO A44

A43 PER. The amount entered is: [A43] per

- SELECT the unit of time below

  4. Quarter  5. Month  6. Year  7. Other-specify (A43 PERSPEC. Please specify. (String 100))

A44. (How much do [R=FU MEMBER: you [CYEAR FU COUNT>1: and your family living there] / R=PROXY: they [CYEAR FU COUNT>1: and their family living there]] usually pay...) For telephone, including cell phone, cable or satellite TV, and internet service per month?

- [HU/CS IN FU: Remind R not to include amounts paid by HU or HUCS people]

  ENTER amount here, then SELECT unit of time on next screen (Month, Year)

  $0 → GO TO A45
  $1 – 9,997 DK/RF → GO TO A45

A44 PER. The amount entered is: [A44] per

- SELECT the unit of time below

  5. Month  6. Year  7. Other-specify (A44 PERSPEC. Please specify. (String 100))

A45. And do [R=FU MEMBER: you / R=PROXY: they] have any other utility expenses?

1. Yes  5. No → GO TO A46

A45A. What were those other utilities expenses?

String 100
A45B. On average, how much are these other utility expenses per month?
  
  - [HU/CS IN FU: Remind R not to include amounts paid by HU or HUCS people]
  - ENTER amount here, then SELECT unit of time on next screen (Month, Year)

\[ \text{\$1 - 997} \rightarrow \text{GO TO A40} \]

↓

A45BPER. The amount entered is: [A45B] per ____

- SELECT the unit of time below

  5. Month 6. Year 7. Other-specify (A45BPERSPEC. Please specify. (String 100))

A40. How is [R=FU MEMBER: your / R=PROXY: their] [A4=APT: apartment / A4=MOBILE: mobile home / ALL OTHERS: home] heated - with gas, electricity, oil or what?

- ENTER all that apply
- PROBE: Any others?


11. Kerosene 97. Other-specify (A40SPEC. Please specify. (String 100))

A46. There are government programs that give money to people to help them pay for heating and cooling their homes. Did [R=FU MEMBER: you / R=PROXY: they] receive help from such a program last year ([PYEAR])?

1. Yes 5. No \rightarrow \text{GO TO A47CKPT}

↓

A46A. About how much did that amount to altogether?

\[ \text{\$1 - 9,997} \]

A47CKPT. CAI CHECKPOINT: WHETHER RESPONDENT IS PROXY (RESPONDENT=7); LOOP 1=HEAD, LOOP 2=WIFE/"WIFE" IF THERE IS ONE IN THE FU

1. R = PROXY \rightarrow \text{GO TO SECTION BC} 5. ALL OTHERS

↓

A47A. [Do / Does] [you / HEAD / 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] job?

1. Yes 5. No \rightarrow \text{GO TO A47C}

↓

A47B. In the past year, [have / has] [you / he / she] connected to the Internet (or World Wide Web) through a computer or laptop at home?

1. Yes \rightarrow \text{GO TO A47 RULE} 5. No

↓

A47C. In the past year, [have / has] [you / he / she] connected to the Internet (or World Wide Web) through a computer or laptop somewhere other than your home?

1. Yes 5. No
A47 RULE: WHETHER WIFE/"WIFE" IN FU (CYFUHU=1, 4 & CYAQRTH=202, 222)

WIFE/"WIFE" IN FU → ASK A47A-A47C FOR WIFE/"WIFE"; ALL OTHERS → GO TO SECTION BC
THEN GO TO SECTION BC
Section BC, Section DE: Employment

BCDE1. We would like to know about what [you / HEAD / WIFE/"WIFE"] [do / does] – [are / is] [you / HEAD / WIFE/"WIFE"] working now, looking for work, retired, keeping house, a student, or what?

- If R says “Unemployed/Not working”, PROBE: [Are you / Is [HEAD / WIFE/"WIFE”]] looking for work?
  - If unemployed/not working and looking for work, ENTER [3]
  - If unemployed/not working and not looking for work, ENTER [6]

- ENTER all that apply
- PROBE: Any others?

1. Working now
2. Only temporarily laid off, sick or maternity leave
3. Looking for work, unemployed
4. Retired
5. Disabled, permanently or temporarily
6. Keeping house
7. Student
8. Other-specify (BCDE1SPEC. Please tell me what [you / H/W/"W"] [are / is] doing now. (String 100))

GO TO EHCINTRO

BCDE2. In what year did [you / H/W/"W"] retire?

7. Student
8. Other

1901 – [CYEAR]

GO TO EHCINTRO

BCDE3. [Are you / Is [he / she]] doing any work for money now?

1. Yes → GO TO EHCINTRO
2. No

BCDE3A. [Have / Has] [you / HEAD / WIFE/"WIFE”] done any work for money since January 1, [P2YEAR]?

Please include any type of work, no matter how small.

1. Yes
2. No

EHCINTRO. Next, I will be asking you about [BCDE1=1,2; BCDE3=YES; BCDE3A=YES]: jobs [you / HEAD / WIFE/"WIFE”] had / ALL OTHERS: what [you / HEAD / WIFE/"WIFE”] [have / has] done and places [you / HEAD / WIFE/"WIFE”] [have / has] lived during the past two years.

- ENTER [1] to go into [HEAD’s / WIFE’s/"WIFE’s”] employment EHC

Begin Employment EHC
Max 6 timelines; **Asked only about Head’s residence;** Timeline #1 preloaded with last wave Address/Start Date if not Empty, for Eligible H/W/"W" (IWType=Reint and Cyaqrth=101,102, 202, 222 and Cyfuhu=FU and ID68/PN=Preload ID68/PN).

**Residence Domain.**

1. **[PRELOADED: IWER: Residence timeline #1 has been preloaded with [HEAD]’s [P2YEAR] residence. CLICK on address label (left-column) and PROBE whether this is still [his / her] current residence. VERIFY and EDIT Start Date and Address as needed. / ALL OTHERS: What is the street address and move-in date of [your / HEAD’s] current residence?]**

   **PROBE for full address**

   If R says "Homeless", ENTER [Homeless] in the Address field for that timeline

   **IWER: By “Winter” we mean Dec, Jan and Feb in that order and overlapping 2 calendar years. If R says “Winter”, PROBE whether that is late in the year (Dec) or early in the following year (Jan, Feb).**

2. **[PRELOADED: If needed:] [Have / Has] [you / he / she] lived anywhere else since January [P2YEAR]? IF YES: Please tell me the address of each of those residences and the dates [you / he / she] lived there.**

   **Interviewer checkpoint:** The prelisted residence was changed from [Preload] (Start) to [RESIDENCE] (Start-End). Is it the same residence? **ASK R only if needed**

   1. Yes
   5. No

**SMonthSeason; EMonthSeason. Starting and Ending Month/Season**

- 21. Winter
- 12. December
- 1. January
- 2. February
- 12. March
- 1. April
- 2. May
- 23. Summer
- 6. June
- 7. July
- 8. August
- 24. Fall
- 9. September
- 10. October
- 11. November

**SDay; EDay. Starting and Ending Day/3rd of Month**

- 41. First third
- 1 2 3 4 5 6 7 8 9 10
- 11. Second third
- 11 12 13 14 15 16 17 18 19 20
- 43. Last third
- 21 22 23 24 25 26 27 28 29 30
- 31. Last day

**SYEAR; EYEAR. Starting and Ending Year**

- 1901–[P3YEAR]. Before [P2YEAR] → Enter Year 1901–[P3YEAR]
- 9997. Before [P2YEAR], DK Exact Year
- 9998. [P2YEAR] – [CYEAR], DK Which Year

**PAST RES: A50. Why did [you / he / she] move?**

- If "Homeless", DO NOT READ question-SELECT [9]
- ENTER all that apply
- **PROBE:** Any other reasons?

1. Take a job; stopped school
2. Nearer to work
3. More space; better place
4. Smaller; less expensive
5. Get own home/place; got married
6. Better area; close to family
7. Evicted; divorced; job transfer; foreclosed
8. Other-specify (A50SPEC. Specify (String 200))
9. Homeless
10. DK
11. RF

**CURRENT RES: A51. Do you think [you / he / she] might move in the next couple of years?**

1. Yes, might or maybe
5. No

**A52. Would you say [you / he / she] definitely will move, probably will move, or are you more uncertain?**

1. Definitely
2. Probably
3. More uncertain

**A53. Why [will/might] [you / he / she] move?**

(String 200)
Max 10 timelines; Disabled if BCDE3 and BCDE3A=No,DK/RF; Timeline #1 preloaded with last wave CMJ Employer/Start Date if not Empty, for Eligible H/W/"W" (IWType=Reint and Cyqtrth=101,102, 202, 222 and Cyfu=FU and ID68/PN = Preload ID68/PN) and (BCDE1=1,2 or BCDE3=Yes).

Employment Domain.

I'd like to know about all of the work for money that [you / HEAD / WIFE/"WIFE"] [have / has] done since January 1, [P2YEAR]. Please include self-employment and any other kind of work that [you / he / she] [have / has] done for pay.

[PRELOADED TIMELINE: IWER: Employment timeline #1 has been preloaded with [HEAD’s / WIFE’s/"WIFE’s"] current main job. CLICK on employer name (left-column) and PROBE whether this is still a current job. VERIFY and EDIT Start Date and Employer as needed. / ALL OTHERS: Start with any job that [you / HEAD / WIFE/"WIFE"] had during this time.]

1. [PRELOADED: If needed: ] What (is / was) the name of this employer?
2. [PRELOADED: If needed: ] When did [you / HEAD / WIFE/"WIFE"] start and when did [you / he / she] stop working for this employer? Please give me all of [your / his / her] start and stop dates if [you / he / she] [have / has] worked for (yourself / himself / herself / this employer) more than once.

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

Before exiting this domain, probe for any other work for pay, no matter how small.

By “Winter” we mean Dec, Jan and Feb in that order and overlapping 2 calendar years. If R says “Winter”, PROBE whether that is late in the year (Dec) or early in the following year (Jan, Feb).

EMPLOYER. ISCURRENT. Job is current SAMECMJ. Preload CMJ current (Reint) CONFIRMSAMECMJ.

Interviewer checkpoint: The prelisted current main job was changed from [Preload] (Start) to [CMJ] (Start-End). Is it the same employer/job? ASK R only if needed

1. Yes 5. No

SMONTHSEASON; EMONTHSEASON. Starting and Ending Month/Season


SDAY; EDAY. Starting and Ending Day/3rd of Month

| 41. First third | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | DK |
| 42. Middle third | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 |
| 43. Last third | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 |

SYEAR; EYEAR. Starting and Ending Year

[P2YEAR] [PYEAR] [CYEAR] 1901– [P3YEAR]. Before [P2YEAR] → Enter Year 1901–[P3YEAR]

9997. Before [P2YEAR], DK Exact Year 9998. [P2YEAR] – [CYEAR], DK Which Year
Max 5 timelines per REASON; Disabled if BCDE3 and BCDE3A=No,DK/RF.

**Time Away Domain.**

1. While [you / HEAD / WIFE/"WIFE"] [were / was] employed during [PYEAR], did [you / he / she] miss any work because someone else was sick?
2. (Did [you / he / she] miss any work) because [you / he / she] [were / was] sick?
3. (Did [you / he / she] miss any work) for a vacation or time off?
4. (Did [you / he / she] miss any work) because [you / he / she] [were / was] on strike?
5. (Did [you / he / she] miss any work) because [you / he / she] [were / was] temporarily laid off from work?

**If Yes:** When was that (or how much time was that) (in [PYEAR])?

**PROBE each type of Time Away:** Any others?

**If R can remember dates, ENTER Start and End dates; Otherwise, CHECK “Don’t Know When” box and ENTER duration of Months, Weeks, Days**

By “Winter” we mean Dec, Jan and Feb in that order and overlapping 2 calendar years. If R says “Winter”, PROBE whether that is late in the year (Dec) or early in the following year (Jan, Feb).

**REASON. Time Away Timelines per PYEAR**

1. Someone else sick
2. Own sick
3. Vacation
4. On strike
5. Temporary layoff

**SMONTHSEASON; EMONTHSEASON. Starting and Ending Month/Season**

|---|-------------|--------------|------------|-------------|----|

**SDAY; EDAY. Starting and Ending Day/3rd of Month**

<table>
<thead>
<tr>
<th></th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
<th>9</th>
<th>10</th>
<th>DK</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>41. First third</td>
<td>1</td>
<td>2</td>
<td>3</td>
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<td></td>
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<td>27</td>
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<td>30</td>
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</tbody>
</table>

**SYEAR; EYEAR. Starting and Ending Year**

[PYEAR]

**TIME AWAY RULE**

[[DK WHEN] SELECTED; OR SMONTH/EMONTH=DK; OR SMONTH=EMONTH & SDAY/EDAY=DK]

Don't Know When During [PYEAR]

**DKWHENMONTHS.**

<table>
<thead>
<tr>
<th></th>
<th>0 – 12</th>
<th>DK</th>
</tr>
</thead>
</table>

**DKWHENWEEKS.**

<table>
<thead>
<tr>
<th></th>
<th>0 – 3</th>
<th>DK</th>
</tr>
</thead>
</table>

**DKWHENDAYS.**

<table>
<thead>
<tr>
<th></th>
<th>0 – 31</th>
<th>DK</th>
</tr>
</thead>
</table>
Max 5 timelines per LOOKNOT per year.

**Not Working Domain.**

1. Were there any times during [P2YEAR] when [you / HEAD / WIFE/"WIFE"] [were / was] not employed (not working at all for pay)? **IF YES:** [Were / Was] [you / he / she] looking for a job, or not looking (for a job)? **PROBE:** When was that (or how much time was that) (when [you / he / she] [were / was] (looking / not looking) in [P2YEAR])?

2. Were there any times during [PYEAR] when [you / HEAD / WIFE/"WIFE"] [were / was] not employed (not working at all for pay)? **IF YES:** [Were / Was] [you / he / she] looking for a job, or not looking (for a job)? **PROBE:** When was that (or how much time was that) (when [you / he / she] [were / was] (looking / not looking) in [PYEAR])?

If R can remember dates, ENTER start and end dates; Otherwise, CHECK “Don’t Know When” box and ENTER duration of Months, Weeks, Days

By “Winter” we mean Dec, Jan and Feb in that order and overlapping 2 calendar years. If R says “Winter”, PROBE whether that is late in the year (Dec) or early in the following year (Jan, Feb).

**LOOKNOT. Not Working Timelines per P2YEAR/PYEAR**

1. **Looking**

2. **Not looking**

**SMONTH/SEASON; EMONTH/SEASON. Starting and Ending Month/Season**

<table>
<thead>
<tr>
<th>SMONTH/SEASON</th>
<th>EMONTH/SEASON</th>
<th>1. January</th>
<th>2. February</th>
<th>DK</th>
</tr>
</thead>
</table>

**SDAY; EDAY. Starting and Ending Day/3rd of Month**

<table>
<thead>
<tr>
<th>SDAY; EDAY</th>
<th>1</th>
<th>2</th>
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<th>4</th>
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<td>29</td>
<td>30</td>
<td>31</td>
</tr>
</tbody>
</table>

**SYEAR; EYEAR. Starting and Ending Year**

[P2YEAR] [PYEAR]

**NOT WORKING RULE**

```
[DK WHEN] SELECTED; OR SMONTH/EMONTH=DK; OR SMONTH=EMONTH & SDAY/EDAY=DK
```

Don't Know When During [[PYEAR] / [P2YEAR]]

[Looking / Not Looking]

**DKWHENMONTHS.**

<table>
<thead>
<tr>
<th>0 – 12</th>
<th>DK</th>
</tr>
</thead>
</table>

**DKWHENWEEKS.**

<table>
<thead>
<tr>
<th>0 – 3</th>
<th>DK</th>
</tr>
</thead>
</table>

**DKWHENDAYS.**

<table>
<thead>
<tr>
<th>0 – 31</th>
<th>DK</th>
</tr>
</thead>
</table>

End Employment EHC
BCDE14ACKPT. CAI CHECKPOINT: WHETHER H/W/"W" HAD JOB PYEAR (EMPLOYEHC1/2.EMPLOYSECTION.BC/DEWTRPY); WHETHER PYEAR WEEKS (EMPLOYEHC1/2.ROUNDED) CAN BE COMPUTED (EMPLOYEHC1/2.BCDEDKJOBSPY)

<table>
<thead>
<tr>
<th>1. NO JOBS [PYEAR]</th>
<th>3. CAN'T COMPUTE WEEKS WORKED</th>
<th>5. ALL OTHERS</th>
</tr>
</thead>
</table>

**BCDE14A. EMPLOYMENT SUMMARY**

1-10. [EMPLOYER] (List of all [PYEAR] Employers from Employment EHC)
From the information you have given me on [2 JOBS: both of / >2 JOBS: all of] [your / HEAD's / WIFE's/"WIFE's"] [1 JOB: job / 2+ JOBS: jobs], [you / he / she] [were / was] employed approximately [#WEEKS] out of 52 weeks in [PYEAR]. Does this sound correct?

1. Yes → GO TO BCDE14BB  
5. No

**BCDE14B. EMPLOYMENT SUMMARY**

1-10. [EMPLOYER] (List of all [PYEAR] Employers from Employment EHC)
Thinking about [your / HEAD's / WIFE's/"WIFE's"] work in [PYEAR], how many weeks did [you / he / she] actually work on [2+ JOBS: all of] [your / his / her] [1 JOB: job / 2+ JOBS: jobs] in [PYEAR], not counting time off for vacations, sick time, unemployment, etc.?

0 → GO TO BCDE14C  
1 – 52 DK/RF

**BCDE14BB. EMPLOYMENT SUMMARY**

1-10. [EMPLOYER] (List of all [PYEAR] Employers from Employment EHC)
On average, how many hours a week did [you / he / she] work on [2+ JOBS: all of] [your / his / her] [1 JOB: job / 2+ JOBS: jobs] during [PYEAR]?

- ROUND DOWN for fractions less than ½ (0.5)
- ROUND UP for fractions ½ (0.5) or more

1 – 112 DK/RF → GO TO BCDE14DCKPT

**BCDE14B3. EMPLOYMENT SUMMARY**

1-10. [EMPLOYER] (List of all [PYEAR] Employers from Employment EHC)
Did [you / he / she] work any overtime which isn’t included in that?

1. Yes 5. No

**BCDE14B4. EMPLOYMENT SUMMARY**

1-10. [EMPLOYER] (List of all [PYEAR] Employers from Employment EHC)
How many hours did that overtime amount to (on [2+ JOBS: all of] [your / his / her] [1 JOB: job / 2+ JOBS: jobs] in [PYEAR])?

- ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)
- ROUND DOWN for fractions less than ½ (0.5)
- ROUND UP for fractions ½ (0.5) or more

1 – 3760 DK/RF → GO TO BCDE14DCKPT
BCDE14B4PER. The amount entered is: [BCDE14B4] per ____

- SELECT the unit of time below

3. Week 4. Two weeks 5. Month 6. Year

7. Other-specify (BCDE14B4PERSPEC. Please specify. (String 100))

GO TO BCDE14DCKPT

BCDE14C. IWER: The EHC indicates that [HEAD / WIFE/"WIFE"] had a job in [PYEAR], but BCDE14B is ‘00’ for total weeks worked in [PYEAR]. Please explain why.

EMPLOYMENT SUMMARY
1-10. [EMPLOYER] (List of all [PYEAR] Employers from Employment EHC)

String 500

BCDE14DCKPT. CAI CHECKPOINT: WHETHER H/W/"W" HAD JOB P2YEAR

(EMPLOYEHC1/2.EMPLOYSECTION.BC/DEWTRP2Y); WHETHER P2YEAR WEEKS (EMPLOYEHC1/2.ROUNDED2) CAN BE COMPUTED (EMPLOYEHC1/2.BCDEDKJOBSPPY)

1. NO JOBS [P2YEAR] 3. CAN’T COMPUTE WEEKS WORKED 5. ALL OTHERS

GO TO BC/DE15CKPT  GO TO BCDE14E

BCDE14D. EMPLOYMENT SUMMARY
1-10. [EMPLOYER] (List of all [PYEAR] Employers from Employment EHC)

For the year before last, [P2YEAR], from the information you have given me on [2 JOBS: both of / 3+ JOBS: all of] [your / HEAD’s/ WIFE’s/"WIFE’s"] [1 JOB: job / 2+ JOBS: jobs], [you / he / she] [were / was] employed approximately [#WEEKS] out of 52 weeks in [P2YEAR]. Does this sound correct?

1. Yes → GO TO BCDE14EE 5. No

BCDE14E. EMPLOYMENT SUMMARY
1-10. [EMPLOYER] (List of all [PYEAR] Employers from Employment EHC)

Thinking about [your / HEAD’s/ WIFE’s/"WIFE’s"] work in [P2YEAR], how many weeks did [you / he / she] actually work on [2+ JOBS: all of] [your / his / her] [1 JOB: job / 2+ JOBS: jobs] in [PYEAR], not counting time off for vacations, sick time, unemployment, etc.?

0 → GO TO BCDE14F 1 – 52 DK/RF

BCDE14EE. EMPLOYMENT SUMMARY
1-10. [EMPLOYER] (List of all [PYEAR] Employers from Employment EHC)

On average, how many hours a week did [you / he / she] work on [2+ JOBS: all of] [your / his / her] [1 JOB: job / 2+ JOBS: jobs] during [P2YEAR]?

- ROUND DOWN for fractions less than ½ (0.5)
- ROUND UP for fractions ½ (0.5) or more

1 – 112 → GO TO BC/DE15CKPT

BCDE14F. IWER: The EHC indicates that [HEAD / WIFE/"WIFE"] had a job in [P2YEAR], but BCDE14E is ‘00’ for total weeks worked in [P2YEAR]. Please explain why.

EMPLOYMENT SUMMARY
1-10. [EMPLOYER] (List of all [PYEAR] Employers from Employment EHC)

String 500
BLAISE “BC” QUESTIONS ARE FOR HEAD IN FU: CYFUFU=1, 4 AND CYAQRTH=101, 102; BLAISE “DE” QUESTIONS ARE FOR WIFE/“WIFE” IN FU: CYFUFU=1, 4 AND CYAQRTH=202, 222; INCLUDE AQSN ON ALL OUTPUT FILES FROM THIS SECTION. VARNAME=BCAQSN, DEAQSN.

EXPORTED DUMMIES FROM EHC:
BCWTRWRK, DEWTRWRK .............. WHETHER WORKED SINCE 1/1/[P2YEAR]
BCWTRWRK=1, DEWTRWRK=1 ...... IF BCDE3=0, 1
BCWTRWRK=0, DEWTRWRK=0...... IF BCDE3=5, DK, RF

JOB INDICATORS:
BCJOBNUM, DEJOBNUM ............... A SEQUENTIAL ID, THE MAX ALLOWED IS 10;
BCEMPNAME, DEEMPNAME ............ EMPLOYER NAME, NEEDED FOR FILL / IWER REFERENCE;
BCWTRP2YEAR, DEWTRP2YEAR ...... WHETHER WORKED DURING [P2YEAR] FOR THIS EMPLOYER-CODES=[1, 0];
BCWTRP1YEAR, DEWTRP1YEAR ...... WHETHER WORKED DURING [PYEAR] FOR THIS EMPLOYER-CODES=[1, 0];
BCWTRCYEAR, DEWTRCYEAR ...... WHETHER WORKED DURING [CYEAR] FOR THIS EMPLOYER-CODES=[1, 0];
BCCUR, DECUR ....................... WHETHER CURRENTLY WORKING FOR THIS EMPLOYER-CODES=[1, 0];
BCMOSTREC, DEMOSTREC .......... WHETHER MOST RECENT EMPLOYER-CODES=[1, 0]; IF ANY JOB IS MARKED BC/DECUR=1, THEN BC/DEMOSTREC IS ALWAYS [0] FOR ANY JOBS THAT HAVE ENDED;
BCACCDATE, DEACCDATE ............ WHETHER START (AND STOP DATE, IF APPLICABLE) ARE KNOWN TO MONTH LEVEL-CODES=[1, 0]

[PYEAR] INDICATORS:
BCDEDKJobsP1YR =1 .................. CAN’T COMPUTE WEEKS WORKED (BCDE14B=0, DK/RF)
BCDEDKHoursP1YR =1 .................. CAN’T COMPUTE HOURS PER WEEK WORKED (BCDE14B=0 OR BCDE14BB=DK/RF)
BCDEDKOTP1YR=1 ..................... CAN’T COMPUTE OVERTIME WORKED (BCDE14B=0 OR BCDE14BB=DK/RF OR BCDE14B3=DK/RF OR BCDE14B4=DK/RF)

[P2YEAR] INDICATORS:
BCDEDKJobsP2YR =1 .................. CAN’T COMPUTE WEEKS WORKED (BCDE14E=0, DK/RF)
BCDEDKHoursP2YR =1 .................. CAN’T COMPUTE HOURS PER WEEK WORKED (BCDE14E=0 OR BCDE14EE=DK/RF)

BC/DE15CKPT. CAI CHECKPOINT: H/W/”W” JOB INDICATORS (BC/DEWTRWRK, BC/DECUR & BC/DEMOSTREC)

<table>
<thead>
<tr>
<th>EMPLOYERS EXPORTED FROM EHC (BC/DEWTRWRK=1)</th>
<th>5. ALL OTHERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. ONE CURRENT JOB (ONLY 1 JOB W/ BC/DECUR=1)</td>
<td>GO TO BC/DE18</td>
</tr>
<tr>
<td>2. 2+ CURRENT JOBS (2+ JOBS W/ BC/DECUR=1)</td>
<td>GO TO BC/DE18</td>
</tr>
<tr>
<td>3. ONE MOST RECENT JOB (ONLY 1 JOB W/ BC/DEMOSTREC=1)</td>
<td></td>
</tr>
<tr>
<td>4. 2+ MOST RECENT JOBS (2+ JOBS W/ BC/DEMOSTREC=1 &amp; SAME END DATE)</td>
<td>GO TO BC/DE61CKPT</td>
</tr>
</tbody>
</table>

BC/DE16. You have just told me that [you / HEAD / WIFE/”WIFE”] [are / is] working now for more than one employer. Which one of these jobs do you consider to be [your / his / her] main job?
- READ list of employers/jobs if needed

1 – 10. LIST OF EMPLOYERS

DK, RF NOT ALLOWED
ASSIGN BC/DE18.JOBTYPE=CMJ

BC/DE17. You mentioned [NUMBER OF JOBS] jobs that ended at the same time. Which one of these jobs do you consider to have been [your / his / her] main job?
- READ list of employers/jobs if needed

1 – 10. LIST OF EMPLOYERS

DK, RF NOT ALLOWED
ASSIGN BC/DE18.JOBTYPE=MRMJ
BC/DE Jobs Block
BC/DE18. JOBS BLOCK (ID’S=AQCASE, AQSN, JOBNUM)
  JOBNUM  1 – 10
  EMPNAME String 100
  JOBTYPGE 1. CMJ Current Main Job  2. MRMJ Most recent Main Job  3. Other Job

BC/DE19CKPT. CAI CHECKPOINT: WHETHER H/W/"W" WORKED THIS JOB PYEAR-CYEAA
(HEAD/WIFEJOBS.BC/DEWTRP1YEAR=1 OR HEAD/WIFEJOBS.BC/DEWTRCYEAR=1)

  1. WORKED THIS JOB DURING [PYEAR] – [CYEAR]  5. ALL OTHERS → GO TO BC/DE47CKPT
     ↓

CMJ
BC/DE19BCKPT. CAI CHECKPOINT: WHETHER THIS JOB IS SAME CMJ AS LAST WAVE; VALUE OF PRELOADED BCDE21A
(IWTYPE=REINT AND CYAQRTH=101,102,202,222 AND CYFUHU=FU AND ID68/PN=PRELOADED ID68/PN AND
EMPLOYEHC1/2[1].SAMECMJ=1)

  1. SAME CMJ & PRELOAD BCDE21A<>DK,RF,EMPTY  3. NOT SAME CMJ
     ↓  4. INEL - SAME CMJ BUT PRELOAD BCDE21A
     ↓
     GO TO BC/DE21A
     Go TO BC/DE20

Reint: Same CMJ
BC/DE19B. EMPLOYER: [EmpName] [(BegMo/BegYr)-(EndMo/EndYr)]
  At our last interview [PYIWDATE=RESPONSE: on [PYIWDATE] / ALL OTHERS: in [P2YEAR]], we recorded [your / HEAD’s / WIFE/"WIFE’s"] job title at [EMPNAME] [(BEGMO/BEGYR)-(ENDMO/ENDYR)] as [PRELOAD BCDE21A].
  Is this [your / his / her] current job title?
  1. Yes BC/DE21A= BCDE21A preload. IF preload BCDE20Code=000, 999, Empty then go to BC/DE20. Else if preload BCDE20Code<>000, 999, Empty then use BC/DE20CODE=BCDE20Code preload and go to
     BC/DE21Ckp.
  5. No

2013 NOTE: BC/DE21ACKPT and BC/DE21A previously asked after BC/DE21

Reint: Same CMJ & BC/DE19B=No, DK, RF, or CMJ If Not Same or INEL / Recon, SQ, RecRec: CMJ
BC/DE21A. EMPLOYER: [EmpName] [(BegMo/BegYr)-(EndMo/EndYr)]
  What is the official title of [your / HEAD’s / WIFE’s/"WIFE’s"] job? (The title that [your / his / her] employer uses.)
  String 200

BC/DE20 RULE: WHETHER THIS JOB IS SAME CMJ (EMPLOYEHC1/2[1].SAMECMJ=1)

  SAME CMJ & DE19B= NO, DK, RF ALL OTHERS → GO TO BC/DE20
  ↓
Reint: Same CMJ & BC/DE19B=No, DK/RF
BC/DE20CKPT. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])

Interviewer Checkpoint:
You entered that [HEAD's / WIFE's/"WIFE's"] job title for this job has changed from [PRELOAD BCDE21A] to [BC/DE21A].
Did R mention that the sort of work [HEAD / WIFE/"WIFE"] does – job duties and activities – are the same even though the job title has changed?

<table>
<thead>
<tr>
<th>1. Yes, job duties and activities are the same</th>
<th>5. No, job duties and activities are different</th>
<th>DK/RF</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRELOAD BCDE20CODE = 000,999,EMPTY</td>
<td>PRELOAD BCDE20CODE &lt;&gt;000,999,EMPTY</td>
<td></td>
</tr>
<tr>
<td></td>
<td>BC/DE20CODE=PRELOAD; GO TO BC/DE21CKPT</td>
<td></td>
</tr>
</tbody>
</table>

2013 NOTE: BC/DE21ACKPT deleted; BC/DE21A moved to before BC/DE20

BC/DE21CKPT. CAI CHECKPOINT: WHETHER THIS JOB IS SAME CMJ AS LAST WAVE; VALUE OF PRELOADED BCDE21CODE
(IWTYPE=REINT and CYAQRTH=101,102,202,222 AND CYFUHU=FU AND ID68/PN=PRELOADED ID68/PN AND
EMPLOYEHC1/2[1].SAMECMJ=1)

<table>
<thead>
<tr>
<th>1. SAME CMJ &amp; PRELOAD BCDE21CODE&lt;&gt;000,999,EMPTY</th>
<th>3. NOT SAME CMJ</th>
<th>4. INEL - SAME CMJ BUT PRELOAD BCDE21CODE =000,999,EMPTY; CMJ BUT H/W/&quot;W&quot; INEL; CMJ BUT RECON, S/O, REC-REC</th>
<th>5. ALL OTHERS (MRMJ, OTHER)</th>
</tr>
</thead>
<tbody>
<tr>
<td>BC/DE21CODE=PRELOAD; GO TO BC/DE21BCKPT</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Reint: CMJ If Not Same, or INEL, or PY-CY MRMJ/OTHER / Recon, SO, RecRec: CMJ, or PY-CY MRMJ/OTHER
BC/DE21. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])
((And) the job with [EMPNAME] ([BEGMO/BEGYR]-[ENDMO/ENDYR]),...)
In [your / his / her] work for [EMPNAME] ([BEGMO/BEGYR]-[ENDMO/ENDYR]), [JOBTYPE=CMJ, MRMJ: what [is / was] [your / HEAD'S / WIFE'S/"WIFE'S"] occupation [JOB IS NOT CURRENT: when [you / he / she] left that employer]? What sort of work [do / does / did] [you / he / she] do? What [are / were] [your / his / her] most important activities or duties? / ALL OTHERS: what sort of work [do / does / did] [you / he / she] do?]

<table>
<thead>
<tr>
<th>[JOBTYPE=OTHER: DO NOT PROBE]</th>
</tr>
</thead>
</table>

Open end

2013 NOTE: BC/DE21ACKPT deleted; BC/DE21A moved to before BC/DE20

BC/DE21BCKPT. CAI CHECKPOINT: WHETHER THIS JOB IS CMJ OR MRMJ (BC/DE18.JOBTYPE=CMJ, MRMJ)

<table>
<thead>
<tr>
<th>1. CMJ</th>
<th>3. MRMJ</th>
<th>5. ALL OTHERS (JOBTYPE=OTHER)</th>
<th>GO TO BC/DE42CKPT</th>
</tr>
</thead>
</table>
CMJ or PY-CY MRMJ

**BC/DE21B. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])**

On a typical day, how many minutes [CMJ] is / [MRMJ] was [your / his / her] round trip commute to and from work?
- If R says “travels from home to temporary lodging near worksite”, ENTER [995]
- If R says “it varies”, ENTER [996]
- If R says “doesn’t commute” (e.g. self-employed, works from home), ENTER [997]

1 – 900  995. Temp lodging (VOL)  996. It varies (VOL)  997. No commute (VOL)

**BC/DE22ACKPT. CAI CHECKPOINT: WHETHER THIS JOB IS SAME CMJ AS LAST WAVE; VALUE OF PRELOADED BCDE22**

(IWTYPE=REINT AND CYAQRTH=101,102,202,222 AND CYFUHU=FU AND ID68/PN=PRELOADED ID68/PN AND EMPLOYEEHC1/2[1].SAMECMJ=1)

<table>
<thead>
<tr>
<th>1. SAME CMJ &amp; PRELOAD BCDE22=SOMEONE ELSE</th>
</tr>
</thead>
<tbody>
<tr>
<td>BC/DE22=PREFLOAD; GO TO BC/DE24CKPT</td>
</tr>
<tr>
<td>3. NOT SAME CMJ</td>
</tr>
<tr>
<td>4. INEL - SAME CMJ BUT PRELOAD BCDE22&lt;&gt;SOMEONE ELSE; CMJ BUT H/W/&quot;W&quot; INEL; CMJ BUT RECON, S/O, REC-REC</td>
</tr>
<tr>
<td>5. ALL OTHERS (MRMJ)</td>
</tr>
</tbody>
</table>

GO TO BC/DE25ACKPT

Reint: CMJ If Not Same, or INEL
Recon, SO, RecRec: CMJ

**BC/DE22. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])**

[Are / Were / Is / Was] [you / HEAD / WIFE/"WIFE"] self-employed, [are / were / is / was] [you / he / she] employed by someone else, or what?

1. Someone else only  2. Both someone else and self  3. Self-employed only  DK/RF  → GO TO BC/DE25ACKPT

GO TO BC/DE24CKPT

**BC/DE23. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])**

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

1. Unincorporated  2. Corporation

GO TO BC/DE25ACKPT

**BC/DE24CKPT. CAI CHECKPOINT: BC/DE22=SOMEONE ELSE ONLY. WHETHER THIS JOB IS SAME CMJ AS LAST WAVE; VALUE OF PRELOADED BCDE22; VALUE OF PRELOADED BCDE24 (IWTYPE=REINT AND CYAQRTH=101,102,202,222 AND CYFUHU=FU AND ID68/PN=PRELOADED ID68/PN AND EMPLOYEEHC1/2[1].SAMECMJ=1)**

<table>
<thead>
<tr>
<th>1. SAME CMJ &amp; PRELOAD BCDE22=SOMEONE ELSE</th>
</tr>
</thead>
<tbody>
<tr>
<td>BC/DE24=PREFLOAD; GO TO BC/DE25ACKPT</td>
</tr>
<tr>
<td>3. NOT SAME CMJ</td>
</tr>
<tr>
<td>4. INEL - SAME CMJ BUT PRELOAD BCDE22&lt;&gt;SOMEONE ELSE; SAME CMJ BUT PRELOAD BCDE24=OTHER,DK,RF, EMPTY; CMJ BUT H/W/&quot;W&quot; INEL; CMJ BUT IWTYPE=RECON, S/O, REC-REC</td>
</tr>
</tbody>
</table>

GO TO BC/DE25ACKPT
Reint: CMJ If Not Same, or INEL / Recon, SO, RecRec: CMJ

BC/DE24. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])

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


7. Other-specify (BC/DE24SPEC. Specify. (String 100))

BC/DE25ACKPT. CAI CHECKPOINT: WHETHER THIS JOB IS SAME CMJ AS LAST WAVE; VALUE OF PRELOADED BCDE22;
PRELOADED BCDE25A ([IWTYPE=REINT AND CYAQRTH=101,102,202,222 AND CYFUHU=FU AND ID68/PN=PRELOADED ID68/PN AND EMPLOYEEHC1/2[1].SAMECMJ=1)

<table>
<thead>
<tr>
<th>1. SAME CMJ &amp; PRELOAD BCDE22=SOMEONE ELSE</th>
<th>3. NOT SAME CMJ</th>
</tr>
</thead>
<tbody>
<tr>
<td>BC/DE25A=PRELOAD; GO TO BC/DE26CKPT</td>
<td></td>
</tr>
</tbody>
</table>

| 4. INEL - SAME CMJ BUT PRELOAD BCDE22<>SOMEONE ELSE; SAME CMJ BUT PRELOAD BCDE25A=DK,RF,EMPTY; CMJ BUT H/W/"W" INEL; CMJ BUT IWTYPE=RECON, S/O, REC-REC |

BC/DE25B. Are there 200 or more?

<table>
<thead>
<tr>
<th>1. Yes</th>
<th>5. No</th>
</tr>
</thead>
<tbody>
<tr>
<td>DK/RF</td>
<td></td>
</tr>
</tbody>
</table>

BC/DE25E. 500 or more?

<table>
<thead>
<tr>
<th>1. Yes</th>
<th>5. No</th>
</tr>
</thead>
<tbody>
<tr>
<td>DK/RF</td>
<td></td>
</tr>
</tbody>
</table>

BC/DE25C. 100 or more?

<table>
<thead>
<tr>
<th>1. Yes</th>
<th>5. No</th>
</tr>
</thead>
<tbody>
<tr>
<td>DK/RF</td>
<td></td>
</tr>
</tbody>
</table>

BC/DE25F. 1000 or more?

<table>
<thead>
<tr>
<th>1. Yes</th>
<th>5. No</th>
</tr>
</thead>
<tbody>
<tr>
<td>DK/RF</td>
<td></td>
</tr>
</tbody>
</table>

BC/DE26CKPT. CAI CHECKPOINT: BC/DE22=SOMEONE ELSE ONLY; WHETHER THIS JOB IS SAME CMJ AS LAST WAVE;
VALUE OF PRELOADED BCDE22; VALUE OF PRELOADED BCDE26, BCDE27 (IWTYPE=REINT AND CYAQRTH =101,102,202,222 AND CYFUHU=FU AND ID68/PN=PRELOADED ID68/PN AND EMPLOYEEHC1/2[1].SAMECMJ=1)

<table>
<thead>
<tr>
<th>1. SAME CMJ &amp; SAME JOB TITLE &amp; PRELOAD BCDE22=SOMEONE ELSE</th>
<th>2. SAME CMJ, NOT SAME TITLE</th>
<th>3. NOT SAME CMJ</th>
</tr>
</thead>
<tbody>
<tr>
<td>BC/DE26, BC/DE27 =PRELOAD; GO TO BC/DE28A</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| 4. INEL - SAME CMJ BUT PRELOAD BCDE22 <> SOMEONE ELSE; SAME CMJ BUT PRELOAD BCDE26=DK,RF,EMPTY OR PRELOAD BCDE27=DK,RF; CMJ BUT H/W/"W" INEL; CMJ BUT IWTYPE=RECON, S/O, REC-REC |

<table>
<thead>
<tr>
<th>5. ALL OTHERS (BC/DE22 &lt;&gt; SOMEONE ELSE)</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO BC28/DE28A</td>
</tr>
</tbody>
</table>
Reint: Same CJ & Title Not Same, or CMJ if Not Same, or INEL / Recon, SO, RecRec: CMJ

BC/DE26. EMPLOYER: [BC EmpName] ([BegMo/BegYr]-[EndMo/EndYr])
Is [your / his / her] current job covered by a union contract?

1. Yes  5. No → GO TO BC/DE28A

↓

BC/DE27. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])
[Do / Does] [you / HEAD / WIFE/"WIE"] belong to that labor union?

1. Yes  5. No

GO TO BC/DE28A

Head only: CMJ & Current BC22<>SomeElse

BC28. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])
Interviewer Checkpoint:
Is [HEAD] a farmer or rancher?

1. Yes  5. No

CMJ

BC/DE28A. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])
And would you say [your / his / 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?

1. All of the time  2. Most of the time  3. Some of the time  4. None of the time

BC/DE29. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])
On [your / his / her] main job for [EMPNAME] ([BEGMO/BEGYR]-[ENDMO/ENDYR]), [are you / is HEAD / WIFE/"WIFE"] salaried, paid by the hour, or what?


GO TO BC/DE30

GO TO BC/DE33

BC/DE38. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])
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 (BC/DE38SPEC. Specify (String 500))

BC/DE39. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])
If [you / he / she] worked an extra hour, how much would [you / he / she] earn for that hour?

• PER hour

$0.00 – 999,997.99
GO TO BC/DE40CKPT
CMJ – Salaried or Salary + commission

BC/DE30. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])
How much is [your / his / her] salary?
  • ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)

$ 1.00 – 9,999,997.99 DK/RF → GO TO BC/DE31

↓

BC/DE30PER. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])
  • The salary amount entered is: [BC/DE30] per ____
  • SELECT the unit of time below

3. Week 4. Two weeks 5. Month 6. Year 7. Other-specify (B30PERSPEC. Specify. (String 100))

BC/DE31. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])
If [you / he / she] were to work more hours than usual during some week, would [you / he / she] get paid for those extra hours of work?

1. Yes 5. No → GO TO BC/DE35CKPT

↓

BC/DE32. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])
About how much would [you / he / she] make per hour for those extra hours?
  • If needed: Would that be time and a half, double time, straight time, comp time or an exact amount?


GO TO BC/DE35CKPT

↓

BC/DE32A. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])
  • SPECIFY amount
  • ENTER amount here, then SELECT unit of time on next screen (Hour, Day, Week, Two weeks, Month, Year)

$ 1.00 – 9,999,997.99 DK/RF → GO TO BC/DE35CKPT

↓

BC/DE32APER. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])
  • The amount entered is: [BC/DE32A] per ____
  • SELECT the unit of time below


GO TO BC/DE35CKPT

CMJ - Paid by hour or Hourly + tips or Hourly + commission

BC/DE33. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])
What is [your / his / her] hourly wage rate for [your / his / her] regular work time?
  • PER hour

$ 1.00 – 997.99
BC/DE34. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])
What is your hourly wage rate for overtime?
- ENTER all that apply
- ENTER Refusal [Ctrl-R] for “does not work overtime”, “does not get overtime pay”

7. Other-specify (BC/DE34SPEC. Specify other overtime wage rate. (String 100))

GO TO BC/DE35CKPT

BC/DE34A. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])
- SPECIFY overtime exact amount
- ENTER amount here, then SELECT unit of time on next screen (Hour, Day, Week, Two weeks, Month, Year)

$1.00 – 9,999,997.99  DK/RF  GO TO BC/DE35CKPT

↓

BC/DE34APER. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])
- The amount entered is: [BC/DE34A] per ____
- SELECT the unit of time below

7. Other-specify (BC/DE34APERSPEC. Specify. (String 100))

BC/DE35CKPT. CAI CHECKPOINT: WHETHER H/W/”W” GETS TIPS (BC/DE29=4) OR COMMISSIONS (BC/DE29=2, 6)

1. TIPS  2. COMMISSIONS  5. ALL OTHERS

GO TO BC/DE40CKPT

BC/DE36. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])
How much are your tips, on average?
- ENTER amount here, then SELECT unit of time on next screen (Hour, Day, Week, Two weeks, Month, Year)

$1.00 – 9,997.99  DK/RF  GO TO BC/DE40CKPT

BC/DE36PER. EMPLOYER: [BC EmpName] ([BegMo/BegYr]-[EndMo/EndYr])
The amount entered is: [BC/DE36] per ____
- SELECT the unit of time below

7. Other-specify (BC/DE36PERSPEC. Specify. (String 100))

BC/DE37. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])
How much is your commission on average?
- ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)

$1.00 – 9,997.99  DK/RF  GO TO BC/DE40CKPT

BC/DE37PER. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])
The amount entered is: [BC/DE37] per ____
- SELECT the unit of time below

7. Other-specify (BC/DE37ERSPEC. Specify. (String 100))
BC/DE40CKPT. CAI CHECKPOINT: BC/DE22= SOMEONE ELSE ONLY. WHETHER THIS JOB IS SAME CMJ AS LAST WAVE;
VALUE OF PRELOADED BCDE41 (IWTYPE=REINT AND CYAQRTH = 101, 102,202,222 AND CYFUHU=FU AND
ID68/PN=PRELOADED ID68/PN AND EMPLOYEHC1/2[1].SAMECMJ=1)

<table>
<thead>
<tr>
<th>BC/DE22 = SOMEONE ELSE</th>
<th>5. ALL OTHERS (BC/DE22&lt;&gt; SOMEONE ELSE)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. SAME CMJ &amp; PRELOAD</td>
<td>GO TO BC/DE42CKPT</td>
</tr>
<tr>
<td>BCDE22 = SOMEONE ELSE</td>
<td></td>
</tr>
<tr>
<td>2. BCDE41=PRELOAD + 2 YRS;</td>
<td></td>
</tr>
<tr>
<td>GO TO BC/DE42CKPT</td>
<td></td>
</tr>
<tr>
<td>3. NOT SAME CMJ</td>
<td></td>
</tr>
<tr>
<td>4. INEL - SAME CMJ BUT PRELOAD BCDE22 &lt;&gt; SOMEONE ELSE; SAME CMJ BUT PRELOAD BCDE41=DK,RF,EMPTY; CMJ BUT H/W/&quot;W&quot; INEL; CMJ BUT RECON, S/O, REC-REC</td>
<td></td>
</tr>
<tr>
<td>5. ALL OTHERS (BC/DE22&lt;&gt; SOMEONE ELSE)</td>
<td>GO TO BC/DE42CKPT</td>
</tr>
</tbody>
</table>

Reint: CMJ If Not Same, or INEL / Recon, SO, RecRec: CMJ

BC/DE41. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])

How many years’ experience [do / does] [you / HEAD / WIFE/"WIFE"] have altogether with [your / his / her] present employer?
- USE Years for amounts given in whole years
- USE Months and Weeks for amounts less than one year
- USE 1 week for amounts of one week or less

<table>
<thead>
<tr>
<th>BC/DE41.YEARS</th>
<th>1 – 50</th>
</tr>
</thead>
<tbody>
<tr>
<td>BC/DE41.MONTHS</td>
<td>1 – 12</td>
</tr>
<tr>
<td>BC/DE41.WEEKS</td>
<td>1 – 52</td>
</tr>
</tbody>
</table>

BC/DE42CKPT. CAI CHECKPOINT: WHETHER H/W/"W" WORKED THIS JOB PYEAR
(HEAD/WIFEJOBS.BC/DEWTRP1YEAR=1); WHETHER WEEKS (EMPLOYEHC1/2.BCDEDKJOBSP1YR) OR HOURS
PER WEEK (EMPLOYEHC1/2.BCDEDKHOURLSP1YR) CAN BE COMPUTED

<table>
<thead>
<tr>
<th>WORKED JOB DURING [PYEAR]</th>
<th>5. ALL OTHERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. CAN’T COMPUTE WKS WORKED</td>
<td>GO TO BC/DE47CKPT</td>
</tr>
<tr>
<td>2. CAN’T COMPUTE HRS PER WK</td>
<td>GO TO BC/DE46</td>
</tr>
<tr>
<td>3. HRS PER WK COMPUTED</td>
<td>GO TO BC/DE43</td>
</tr>
<tr>
<td>4. ONE JOB</td>
<td>GO TO BC/DE46</td>
</tr>
</tbody>
</table>

Pyear JOB & Employehc1/2.Bcedkjobsp1yr=1
BC/DE42A. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])
((And) the job with [EMPNAME] ([BEGMO/BEGYR]-[ENDMO/ENDYR]),...)

How many weeks out of the year did [you / HEAD / WIFE/"WIFE"] actually work on this job in [PYEAR], not including any time off that you told me about earlier?
- IF R says “Every week except what [I / he / she] took off”, ENTER [97]

| 1.0 – 52.0 | 97.0 |

*BC/DE42A data used to calculate ‘total weeks worked’ and not included in public use data
BC/DE43CKPT. CAI CHECKPOINT: WHETHER PYEAR HRS PER WK CAN BE COMPUTED (EMPLOYECH1/2. 
BCDEDKHOURSP1YR)

1. WKS WORKED COMPUTED; CAN'T COMPUTE HRS/WK
2. CAN'T COMPUTE WKS WORKED OR HRS/WK
5. ALL OTHERS → GO TO BC/DE44CKPT

PY JOB & Employehc1/2. Bcdedkhoursp1yr=1
BC/DE43. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])
((And) the job with [EMPNAME] ([BEGMO/BEGYR]-[ENDMO/ENDYR]),...)
On average, how many hours a week did [you / he / she] work on this job in [PYEAR]?
• ROUND DOWN for fractions less than ½ (0.5)
• ROUND UP for fractions ½ (0.5) or more
1 – 112

BC/DE44CKPT. CAI CHECKPOINT: WHETHER PYEAR OVERTIME CAN BE COMPUTED (EMPLOYECH1/2. BCDEDKOTP1YR)

1. CAN'T COMPUTE OVERTIME
5. ALL OTHERS → GO TO BC/DE46

PY JOB & Employehc1/2. Bcdedkotp1yr =1
BC/DE44. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])
((And) the job with [EMPNAME] ([BEGMO/BEGYR]-[ENDMO/ENDYR]),...)
Did [you / he / she] work any overtime [HRS/WK COMPUTED BUT OT NOT COMPUTED: (on this job in [PYEAR]) / HRS/WK & OT NOT COMPUTED: which isn’t included in that]?
1. Yes
5. No → GO TO BC/DE46

BC/DE45. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])
How many hours did that overtime amount to in (that period during) [PYEAR]?
• ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)
• ROUND DOWN for fractions less than ½ (0.5)
• ROUND UP for fractions ½ (0.5) or more
1 – 3760 DK/RF → GO TO BC/DE46

BC/DE45PER. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])
• The amount entered is: [BC/DE45] per ______
• SELECT the unit of time below
3. Week
4. Two weeks
5. Month
6. Year
7. Other-specify (DE45PERSPEC. Specify [String 100])
PY Job
BC/DE46. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])
((And) the job with [EMPNAME] ([BEGMO/BEGYR]-[ENDMO/ENDYR]),...)
About how much did [you / he / she] make at this job in [PYEAR]?
• ENTER amount here, then SELECT unit of time on next screen (Hour, Day, Week, Two weeks, Month, Year)

$ 1.0 – 9,999,997.99 DK/RF → GO TO BC/DE47CKPT

↓

BC/DE46PER. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])
• The amount entered is: [BC/DE46] per _____
• SELECT the unit of time below
  7. Other-specify (BC/DE46PERSPEC. Specify. (String 100))

BC/DE47CKPT. CAI CHECKPOINT: WHETHER H/W/"W" WORKED THIS JOB P2YEAR
(HEAD/WIFEJOBS.BC/DEWTRP2YEAR=1); WHETHER WEEKS (EMPLOYEEHC1/2.BCDEDKJOBSP2YR) OR HOURS PER WEEK (EMPLOYEEHC1/2.BCDEDKHOURSP2YR) CAN BE COMPUTED

WORKED JOB DURING [P2YEAR]
> ONE JOB (EMPLOYEEHC1/2.BCDEWTRPPYCOUNT)
4. ONE JOB GO TO BC/DE19ACKPT
1. CAN’T COMPUTE WKS WORKED
GO TO BC/DE48
2. CAN’T COMPUTE HRS PER WK
GO TO BC/DE19ACKPT
3. HRS PER WK COMPUTED

5. ALL OTHERS

P2Y Job & Employehc1/2.Bcdedkjobsp2yr=1
BC/DE47A. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])
((And) the job with [EMPNAME] ([BEGMO/BEGYR]-[ENDMO/ENDYR]),...)
How many weeks out of the year did [you / HEAD / WIFE/"WIFE"] actually work on this job in [P2YEAR]?
• IF R says "Every week except what (I / he / she) took off", ENTER [97]

1.0 – 52.0 97.0

BC/DE48CKPT. CAI CHECKPOINT: WHETHER P2YEAR HOURS PER WEEK CAN BE COMPUTED
(EMPLOYEEHC1/2.BCDEDKHOURSP2YR)

1. WKS WORKED COMPUTED; CAN’T COMPUTE HRS/WK
2. CAN’T COMPUTE WKS WORKED OR HRS/WK
5. ALL OTHERS → GO TO BC/DE19ACKPT

P2Y Job & Employehc1/2.Bcdedkhoursp2yr=1
BC/DE48. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])
((And) the job with [EMPNAME] ([BEGMO/BEGYR]-[ENDMO/ENDYR]),...)
On average, how many hours a week did [you / he / she] work on this job in [P2YEAR]?
• ROUND DOWN for fractions less than ½ (0.5)
• ROUND UP for fractions ½ (0.5) or more

1 – 112
BC/DE19ACKPT. CAI CHECKPOINT: WHETHER THIS JOB IS CMJ, OR MRMJ WORKED DURING [PYEAR] – [CYEAR]
(JOBTYPE=CMJ or JOBTYPE=MRMJ & HEAD/WIFEJOBS.BC/DEWTRP1YEAR=1 OR
HEAD/WIFEJOBS.BC/DEWTRCYEAR=1))

1. CMJ & BC/DE22= SOMEONE ELSE, BOTH SOMEONE AND SELF
2. CMJ & BC/DE22= SOMEONE ELSE, BOTH SOMEONE AND SELF
3. MRMJ WORKED PYEAR- CYEAR
4. ALL OTHERS (MRMJ WORKED P2YEAR ONLY, OTHER JOB)

↓
GO TO BC/DE50CKPT

CMJ or PY - CY MRMJ
BC/DE19A. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])
We would like to obtain information about employer characteristics for workers like [you / HEAD /
WIFE/"WIFE"].
In order to do this, we need the full address of the place where [you / he / she] [work / works] for [EMPNAME]
([BEGMO/BEGYR]-[ENDMO/ENDYR]). We would use the employer address to collect general information
about [your / his / her] employer, such as number of workers or benefits offered to employees.
As you know, participation in our survey is confidential, and that includes maintaining confidentiality in
collecting information about employers.
• If R doesn't know any part of the address, ENTER Ctrl-D
• If R refuses the entire address, ENTER Ctrl-R
1. Continue [DK/RF] → GO TO BC/DE50CKPT

↓

BC/DE19ADDR1. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])
What is the mailing address?
• Address 1
• Enter street address here
• Enter PO Box at next screen
• Ctrl-D and Ctrl-R not allowed - for DK/RF TYPE [DK] or [REF]

String 40

BC/DE19ADDR2. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])
• Address 2
• Enter PO Box here
• If none, PRESS [Enter] to continue
• Ctrl-D and Ctrl-R not allowed - for DK/RF TYPE [DK] or [REF]

String 40

BC/DE19CITY. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])
• City
• Ctrl-D and Ctrl-R not allowed - for DK/RF TYPE [DK] or [REF]

String 40

BC/DE19STATE; BC/DE19STABBR. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])
• State
• Start typing the name of the State to bring up the look-up list
• If foreign country, ENTER [FOR] to select “Foreign Country”

String 30; String 4; State Lookup List. State Foreign Country [DK/RF] → GO TO BC/DE19PHONE

↓
↓
BC/DE19ZIP. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])
- Zip Code
- If foreign country, ENTER all [0]'s
- Ctrl-D and Ctrl-R not allowed - for DK/RF ENTER all [0]'s

String 10; all 8's/9's not allowed

BC/DE19CNTRY; BC/DE19CNTRYABB
EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])
- Country if different from USA
- Start typing the name of the Foreign Country to bring up the look-up list

String 30; String 2; Country Lookup List

BC/DE19PHONE. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])
(And) 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
- Ctrl-D and Ctrl-R not allowed - for DK/RF ENTER all [0]'s

String 10; all 8's/9's not allowed

BC/DE50CKPT. CAI CHECKPOINT: WHETHER H/W/"W" STOPPED THIS JOB DURING P2YEAR-CY
((HEAD/WIFEJOBS.BC=DECUR=0) OR (BC/DE18.JOBTYPE=MRMJ) OR (BC/DE18.JOBTYPE=OTHER AND HEAD/WIFEJOBS.BC=DECUR=0))

↓

1. STOPPED JOB [P2YEAR] – [CYEAR]
5. ALL OTHERS → GO TO BC/DE52CKPT

Job Ended P2Y-CY
BC/DE51. EMPLOYER: [EmpName] ([BegMo/BegYr]-[EndMo/EndYr])
((And) the job with [EMPNAME] ([BEGMO/BEGYR]-[ENDMO/ENDYR]),...)
Why did [you / he / she] stop working for [EMPNAME] ([BEGMO/BEGYR]-[ENDMO/ENDYR])? Did the company go out of business, [were / was] [you / he / she] laid off, did [you / he / she] quit, or what?

String 500

BC/DE52CKPT. CAI CHECKPOINT: WHETHER H/W/"W" HAS MORE JOBS

1. MORE JOBS FROM EHC → REPEAT BC/DE19-BC/DE51; MAX=10; THEN GO TO BC/DE61CKPT
5. ALL OTHERS

End BC/DE Jobs Block

BC/DE61CKPT. CAI CHECKPOINT: WHETHER H/W/"W" DID NOT WORK AT ALL SINCE 1/1/P2YEAR (BC/DEWTRWRK=0);
VALUE OF PRELOADED BCDE62, BCDE63 (IWTYPE=REINT AND CYAQRTH = 101, 102,202,222 AND CYFUHU=FU AND ID68/PN=PRELOADED ID68/PN AND EMPLOYEEHC1/2[1].SAMECMJ=1)

↓

NO WORK SINCE 1/1/[P2YEAR]
1. PRELOAD BCDE62=YES
2. PRELOAD BCDE62<>YES
4. INEL - PRELOAD BCDE62=YES BUT PRELOAD BCDE63=DK,RF,EMPTY;
H/W/"W" INEL; RECON, S/O, REC-REC
5. ALL OTHERS (WORKED SINCE 1/1/[P2YEAR])
USE PRELOAD; GO TO BC/DE64
GO TO BC/DE64
BC/DE62. [Have / Has] [you / HEAD / WIFE/"WIFE"] ever done any work for money?

1. Yes 5. No → GO TO BC/DE64

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

- SELECT Month and [Enter] to go to next screen for year
- IF NECESSARY: What would be your best estimate?


BC/DE63.YEAR. (In what month and year did [you / he / she] last work?)

[BC/DE63.MONTH], ______

- ENTER Year
- ENTER [9997] if before [P2YEAR] and DK exact year

1901 – [P3YEAR] 9997. Before [P2YEAR], DK Exact Year

BC/DE64. [Have / Has] [you / HEAD / WIFE/"WIFE"] been looking for [BCDE1=1, 2 OR BCDE3=YES: another job / ALL OTHERS: work] during the past four weeks?

1. Yes 5. No → GO TO SECTION DE

BC/DE65. What [have / has] [you / he / she] been doing the last four weeks to find [BCDE1=1, 2 OR BCDE3=YES: another job / ALL OTHERS: work] during the past four weeks?

- IF R SAYS "Internet, website, on-line, on the computer" etc., PROBE for specific activity: What did [you / HEAD / WIFE/"WIFE"] do - did [you / HEAD / WIFE/"WIFE"] contact employers or agencies, check out potential employers without applying, or what?
- ENTER all that apply
- PROBE: Any others?

1. Checked with public employment agency 2. Checked with private employment agency
3. Checked with current employer directly 4. Checked with other employer directly
5. Checked with friends or relatives 6. Placed or answered ads
7. Other-specify (BC/DE65SPEC. Specify. (String 100)) 8. Nothing
9. Contacted school/university employment center 10. Checked union/professional registers
11. Sent out resumes/filled out applications 12. Attended job training programs/courses
13. Went on job interviews 14. Looked at ads or employers without applying

BC/DE66CKPT. CAl CHECKPOINT: WHETHER H/W/"W" DOES NOT HAVE CMJ (BC/DE15CKPT=3, 4, 5)

1. NO CMJ 5. ALL OTHERS → GO TO SECTION DE FOR CURRENT WIFE/"WIFE"; THEN GO TO SECTION F

BC/DE67. How long [have / has] [you / he / she] been looking for work?

YEARS 1 – 50
MONTHS 1 – 12
WEEKS 1 – 52
Section F: Expenditures

F1. Now I have a few questions about housework and food costs.
   • ENTER [1] to continue

1. Continue

F1ACKPT. CAI CHECKPOINT: WHETHER HEAD IS MALE (CYAQRTH=101 & CYFUHU=1, 4) OR FEMALE (CYAQRTH=102 & CYFUHU=1, 4); WHETHER WIFE/“WIFE” IN FU (CYAQRTH=202, 222 & CYFUHU=1, 4)

HEAd IS MALE

1. WIFE/“WIFE” IN FU
   2. NO WIFE/“WIFE” IN FU
   GO TO F3

GO TO F3

3. HEAD IS FEMALE

F2. About how much time [do / does] [you / WIFE/“WIFE”] spend on housework in an average week? I mean time spent cooking, cleaning, and doing other work around the house.
   • ROUND DOWN for fractions less than ½ (0.5)
   • ROUND UP for fractions ½ (0.5) or more

Housework hours per week:

<table>
<thead>
<tr>
<th>Hours per week</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>None</td>
</tr>
<tr>
<td>1-111</td>
<td>Actual hours</td>
</tr>
<tr>
<td>112</td>
<td>112 Hours or more</td>
</tr>
<tr>
<td>0 – 112</td>
<td></td>
</tr>
</tbody>
</table>

F3. About how much time [do / does] [you / HEAD] spend on housework in an average week? (I mean time spent cooking, cleaning, and doing other work around the house.)
   • ROUND DOWN for fractions less than ½ (0.5)
   • ROUND UP for fractions ½ (0.5) or more

Housework hours per week:

<table>
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</tr>
<tr>
<td>0 – 112</td>
<td></td>
</tr>
</tbody>
</table>

F4CKPT. CAI CHECKPOINT: NUMBER OF CURRENT FU MEMBERS (CYFUHU=1, 4)

1. 2+ FU MEMBERS   5. ALL OTHERS → GO TO F7CKPT
   ↓

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

<table>
<thead>
<tr>
<th>Days per week</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 – 7</td>
<td></td>
</tr>
</tbody>
</table>

F7CKPT. CAI CHECKPOINT: WHETHER ANY CHILDREN AGE 5-18 YEARS OLD WERE IN THE FU IN PYEAR (FUP1YEAR.AGEIWDATE=5-18)

1. CHILD(REN) AGE 5-18 IN PYEAR FU   5. ALL OTHERS → GO TO F6CKPT
   ↓
F6AB. **And during [PYEAR]**, did **ONE CHILD IN FU PYEAR**: [CYNAMF CYNAML] / **ALL OTHERS**: any child in [R=FU MEMBER: your / R=PROXY: the] family between 5 and 18 years old) receive free or reduced-cost breakfasts or lunches at school? If “Yes”: Was that breakfast, lunch, or both?

1. Yes, breakfast only 2. Yes, lunch only 3. Yes, both 5. No, neither

F6CKPT. **CAI CHECKPOINT: WHETHER ANY CHILDREN AGE 15 YEARS OLD OR YOUNGER WERE IN THE FU IN PYEAR** (FUP1YEAR.AGEIWDATE<16)

1. CHILD(REN) AGE < 16 IN PYEAR FU 5. ALL OTHERS → GO TO F7B2CHPT

F7 (F6D). **How much did [R=FU MEMBER: you [PYEAR FU COUNT>1: and your family living there] / R=PROXY & CYEAR FU COUNT=1: they / R=PROXY & PYEAR FU COUNT>1: the family living there] pay for child care in [PYEAR]?”**

- ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)

$0 → GO TO F7A $1 – 999,997 DK/RF → GO TO F7MO

**F7PER (F6DPER). The amount entered is:** [F6D] per _____
- SELECT the unit of time below
  3. Week 4. Two weeks 5. Month 6. Year 7. Other-specify (F7PERSPEC. Specify. (String 100))

F7MO (F6D2). **For which months in [PYEAR] was that?**
- ENTER all that apply
- PROBE: Any others?


F7A (F6E). **Was any child enrolled in a day care center or family day care home in [PYEAR]?”**

1. Yes 5. No → GO TO F7B2CHPT

**F7B (F6F). Were meals or snacks provided in any of these day care arrangements (attended last year)?**

1. Yes 5. No → GO TO F7B2CHPT

**F7B1 (F6G). 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

F7B2CHPT (F6HCKPT). **CAI CHECKPOINT: WHETHER ANY FEMALE FU MEMBERS AGE 16-46 YEARS OLD (FUP1YEAR.GENDER=2 AND FUP1YEAR.AGEIWDATE=16-46) OR ANY CHILDREN AGE 5 YEARS OLD OR YOUNGER (FUP1YEAR.AGEIWDATE<6), WERE IN THE FU IN PYEAR**

1. FEMALE(S) AGE 16-46, OR CHILD(REN) AGE < 6, IN PYEAR FU 5. ALL OTHERS → GO TO F7CKPT
51

F7B2 (F6I). And during [PYEAR], did anyone in [R=FU MEMBER: your / R=PROXY: the] family get food through the WIC program?

1. Yes 5. No

F7CKPT (F7CKPT). CAI CHECKPOINT: WHETHER ANY FU MEMBERS AGE 61 YEARS OLD OR OLDER WERE IN THE FU IN PYEAR (FUP1YEAR.AGEIWDAT>60)

[1. FU MEMBER(S) AGE > 60 IN PYEAR FU 5. ALL OTHERS] → GO TO F8

F7C. During [PYEAR], did [R=FU MEMBER: you [PYEAR FU COUNT>1: or anyone in your family] / R=PROXY: they] receive free or reduced-cost meals for the elderly?

1. Yes 5. No

F8. Did [R=FU MEMBER: you [P2YEAR FU COUNT>1: or anyone else in your family] / R=PROXY & CYEAR FU COUNT=1: they / R=PROXY & P2YEAR FU COUNT>1: anyone in the family] receive food stamp benefits, that is, either food stamps or a food stamp benefit card, at any time in [P2YEAR], two years ago?

• If needed: Food stamp benefits are issued by SNAP, the federal Supplemental Nutrition Assistance Program, also called Food Stamp Program.

1. Yes 5. No

F11. Did [R=FU MEMBER: you [PYEAR FU COUNT>1: or anyone else in your family] / R=PROXY & CYEAR FU COUNT=1: they / R=PROXY & PYEAR FU COUNT>1: anyone in the family] receive food stamp benefits, (that is, either food stamps or a food stamp benefit card,) at any time last year, in [PYEAR]?

• If needed: Food stamp benefits are issued by SNAP, the federal Supplemental Nutrition Assistance Program, also called Food Stamp Program.

1. Yes 5. No → GO TO F14


• If needed: Food stamp benefits are issued by SNAP, the federal Supplemental Nutrition Assistance Program, also called Food Stamp Program.

$ 1 – 999,997 [DK/RF] → GO TO F13

F12PER. The amount entered is: [F12] per ____

• SELECT the unit of time below

3. Week 4. Two weeks 5. Month 6. Year 7. Other-specify (F12PERSPEC. Specify. (String 100))

F13. During which months was that?

• ENTER all that apply

• PROBE: Any others?


   • If needed: Food stamp benefits are issued by SNAP, the federal Supplemental Nutrition Assistance Program, also called Food Stamp Program.
   1. Yes 5. No → GO TO F18F22

F15. How many members of [R=FU MEMBER: your / R=PROXY: the] family were covered (by food stamp benefits)?
   • If needed: Food stamp benefits are issued by SNAP, the federal Supplemental Nutrition Assistance Program, also called Food Stamp Program.
   • ENTER [7] for seven or more family members
   1 – 7

F16. How much did [R=FU MEMBER: you / R=PROXY: they] receive (in food stamp benefits) last month?
   • If needed: Food stamp benefits are issued by SNAP, the federal Supplemental Nutrition Assistance Program, also called Food Stamp Program.
   $1 – 999,997

   • If needed: Food stamp benefits are issued by SNAP, the federal Supplemental Nutrition Assistance Program, also called Food Stamp Program.

   • [HU/CS IN FU: IF R lives with non-FU members, PROBE: Is that only [R=FU MEMBER: your / R=PROXY: their] (FU’s) share of the food?]
   • ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)

   [F17 NOT ASKED: $ 0.00] → GO TO F19F23
   1. Yes 5. No → GO TO F19F23
   $1.00 – 99,997.99
   DK/RF → GO TO F19F23

F18F22PER. The amount entered is: [F18F22] per ___
   • SELECT the unit of time below

   3. Week 4. Two weeks 5. Month 6. Year 7. Other-specify [F18F22PERSPEC. Specify. (String 100)]
F19F23. Do \([R=FU MEMBER]: you / R=PROXY: they\] have any food delivered to the door which isn’t included in that?

1. Yes 5. No \(\rightarrow GO TO F21F25\)

F20F24. How much do \([R=FU MEMBER]: you / R=PROXY: they\] spend on that food?

- [HU/CS IN FU: IF R lives with non-FU members, PROBE: Is that only \([R=FU MEMBER]: your / R=PROXY: their\] (FU’s) share of the food?]
- ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)

\(\$ 1.00 – 99,997.99\ DK/RF \(\rightarrow GO TO F21F25\)

\(\downarrow\)

F20F24PER. The amount entered is: \([F20F24]\) per ____

- SELECT the unit of time below
  3. Week 4. Two weeks 5. Month 6. Year 7. Other-specify \([F20F24PERSPEC. Specify. (String 100)]\)

F21F25. About how much \([do / does\] \([R=FU MEMBER]: you \([CYEAR FU COUNT>1]: and everyone else in your family] / R=PROXY \& CYEAR FU COUNT=1: they \([CYEAR FU COUNT>1]: the family\] spend eating out?

- [HU/CS IN FU: IF R lives with non-FU members, PROBE: Is that only \([R=FU MEMBER]: your / R=PROXY: their\] (FU’s) share of the food?]
- ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)

\(\$ 0.00 \rightarrow GO TO F47\) \(\$ 1.00 – 99,997.99\ DK/RF \(\rightarrow GO TO F47\)

\(\downarrow\)

F21F25PER. The amount entered is: \([F21F25]\) per ____

- SELECT the unit of time below
  3. Week 4. Two weeks 5. Month 6. Year 7. Other-specify \([F21F25PERSPEC. Specify. (String 100)]\)

Vehicles

F47. These next questions are about personal vehicles and transportation. [Do / Does] \([R=FU MEMBER]: you \([CYEAR FU COUNT>1]: or anyone else in your family living there] / R=PROXY \& CYEAR FU COUNT=1: they \([CYEAR FU COUNT>1]: the family\] 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 \(\rightarrow GO TO F81A\)

\(\downarrow\)

F48. Altogether, how many vehicles \([do / does\] \([R=FU MEMBER]: you \([CYEAR FU COUNT>1]: and your family living there] / R=PROXY \& CYEAR FU COUNT=1: they \([R=PROXY \& CYEAR FU COUNT>1]: the family\] own or lease (for \([R=FU MEMBER]: your / R=PROXY: their\] personal use)?

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

1 – 10 \(\rightarrow GO TO F81A\)

\(\downarrow\)

F49A. \([VEHICLE 1]: I would like to ask a few questions about \([F48=1]: that vehicle / F48>1: those vehicles, starting with the newest]. / ALL OTHERS: For the next vehicle:

What is the year?

1901 – [C2YEAR]
F49B. What is the make and model of the vehicle?
   • PROBE if multiple models are listed with the same name

   MAKE & MODEL  DK/RF  → GO TO F49BCKPT

   F49B1. Hybrid Indicator from Car Database Lookup (CODES=0, 1)
   F49C. 8-Digit Vehicle Model ID from Car Database Lookup

F49BCKPT. CAI CHECKPOINT: WHETHER VEHICLE IS A HYBRID (CARDATAMODEL F49B1=1); WHETHER VEHICLE IS OLDER THAN 1999 (F49A<1999)

   1. VEHICLE IS HYBRID  2. VEHICLE YEAR <= 1998  5. ALL OTHERS
   GO TO F53 RULE

F49B2. [F49A F49B]
   Is this a hybrid or an electric vehicle? If "Yes": Is it a hybrid or is it electric?
   1. Yes, hybrid  2. Yes, electric  5. No, neither

F53 RULE: NUMBER OF VEHICLES AT F48

   MORE VEHICLES  → REPEAT F49A-F49B2; MAX=3;  NO MORE VEHICLES
   THEN GO TO F53

F53. [F49A F49B]
   (And) for [R=FU MEMBER: your / R=PROXY: their] [F49B=DK/RF: [first / second / third] vehicle / ALL OTHERS: [F49B]], did [R=FU MEMBER: you / R=PROXY: they] buy it, lease it, receive it as a gift, or what?
   1. Bought  2. Leased  3. Received as a gift  7. Other-specify (F53SPEC. Specify. (String 100))  DK/RF

   GO TO F75 RULE

F55. [F49A F49B]
   In what year did [R=FU MEMBER: you / R=PROXY: they] [F53= BOUGHT: buy / F53= LEASED: lease / F53=GIFT: receive / F53=OTHER: acquire] it?
   1901 – [CYEAR]

F57. [F49A F49B]
   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 RULE

   ↓

F58. [F49A F49B]
   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 RULE: WHETHER THIS VEHICLE BOUGHT (F53=1) OR LEASED (F53=2) DURING [P2YEAR-CYEAR] (F55)

<table>
<thead>
<tr>
<th>BOUGHT [P2YEAR] OR LATER</th>
<th>LEASED [P2YEAR] OR LATER</th>
<th>ALL OTHERS</th>
<th>→ GO TO F75 RULE</th>
</tr>
</thead>
<tbody>
<tr>
<td>↓</td>
<td></td>
<td></td>
<td>GO TO F71 RULE</td>
</tr>
</tbody>
</table>

F61. [F49A F49B]
What was the total price of the [F49B=DK/RF: [first / second / third] vehicle / ALL OTHERS: [F49B]]? $1 – 999,997

F64. [F49A F49B]
How much did [R=FU MEMBER: you / R=PROXY: they] pay down in cash?
- IF necessary: Over and above the value of [R=FU MEMBER: your / R=PROXY: their] trade-in or sale.

$0 – 999,997

F65. [F49A F49B]
Did [R=FU MEMBER: you / R=PROXY: they] borrow or finance part of the total price?

1. Yes 5. No → GO TO F75 RULE

↓

F66. [F49A F49B]
How much did [R=FU MEMBER: you / R=PROXY: they] borrow, not including financing charges?

$1 – 999,997

F67. [F49A F49B]
How much are [R=FU MEMBER: your / R=PROXY: their] current payments and how often are they made?
- ENTER [0] if paid off
- ENTER amount here, then SELECT unit of time on next screen (Month, Year)

$0 → GO TO F75 RULE

$1 – 999,997

DK/RF → GO TO F75 RULE

↓

F67PER. The amount entered is: [F67] per ____

- SELECT the unit of time below

4. Two Weeks 5. Month 6. Year 7. Other-specify (F67PERSPEC. Specify. (String 100))

F69. [F49A F49B]
How many payments did [R=FU MEMBER: you / R=PROXY: they] agree to make altogether?

1 – 100

F70. [F49A F49B]
How many payments have [R=FU MEMBER: you / R=PROXY: they] made?

0 – 100
F71 RULE: WHETHER THIS VEHICLE LEASED (F53=2) DURING [P2YEAR-CYEAR] (F55)

[LEASED [P2YEAR] OR LATER] ALL OTHERS → GO TO F75 RULE

↓

F71. [F49A F49B]
[And for [R=FU MEMBER: your / R=PROXY: their] [F49B=DK/RF: [first / second / third] vehicle / ALL OTHERS: [F49B]]] how much was [R=FU MEMBER: your / R=PROXY: their] initial outlay for that lease - including [R=FU MEMBER: your / R=PROXY: their] down payment and any fees?

$ 1 – 999,997

F72. [F49A F49B]
How much are [R=FU MEMBER: your / R=PROXY: their] payments and how often are they made?

• ENTER amount here, then SELECT unit of time on next screen (Month, Year)

$ 1 – 999,997 DK/RF → GO TO F75 RULE

↓

F72PER. The amount entered is: [F72] per _____

• SELECT the unit of time below

   4. Two Weeks 5. Month 6. Year 7. Other-specify (F72PERSPEC. Specify. (String 100))

F73. [F49A F49B]
How many payments did [R=FU MEMBER: you / R=PROXY: they] agree to make altogether?

1 – 100

F74. [F49A F49B]
How many payments have [R=FU MEMBER: you / R=PROXY: they] made?

0 – 100

F75 RULE: NUMBER OF VEHICLES AT F48

MORE VEHICLES → REPEAT F53-F74; MAX=3; NO MORE VEHICLES THEN GO TO F76 RULE

↓

F76 RULE: WHETHER OWNS OR LEASES ANY VEHICLES (F48=1-3 VEHICLES)

OWNS OR LEASES A VEHICLE ALL OTHERS → GO TO F81A

↓

F77. [F49A F49B[1]; F49A F49B[2]; F49A F49B[3]]

• IF necessary: Please give me your best estimate.

• ENTER amount here, then SELECT unit of time on next screen (Month, Year)

$ 0 → GO TO F78 RULE $ 1 – 999,997 DK/RF → GO TO F78 RULE

↓
F77PER. The amount entered is: [F77] per ____
- SELECT the unit of time below
  5. Month
  6. Year
  7. Other-specify (F77PERSPEC. Specify. (String 100))

F78 RULE: WHETHER ANY VEHICLE BOUGHT (F53=1) OR LEASED (F53=2) BEFORE [P2YEAR] (F55)

[ANY VEHICLE BOUGHT/LEASED BEFORE [P2YEAR] ALL OTHERS] → GO TO F80A

F79. [F49A F49B[1]; F49A F49B[2]; F49A F49B[3]]
[ANY VEHICLE BOUGHT/LEASED [P2YEAR] OR LATER: Other than the car payments you already told me about,] how much did [R=FU MEMBER: you [CYEAR FU COUNT>1: and your family living there] / R=PROXY & CYEAR FU COUNT=1: they / R=PROXY & CYEAR FU COUNT>1: the family] pay in car payments in [LAST MONTH]?
- INCLUDE vehicle purchase and lease payments not already covered
$ 0 – 999,997

F80A. Altogether for the month of [LAST MONTH], how much did [R=FU MEMBER: you [CYEAR FU COUNT>1: and your family living there] / R=PROXY & CYEAR FU COUNT=1: they / R=PROXY & CYEAR FU COUNT>1: the family] pay for each of these transportation related expenses. Do not include costs associated with trips and vacations, which we will ask about later.
Car repairs or maintenance?
- ENTER to the nearest dollar.
- If None, ENTER [0]
$ 0 – 999,997

F80B. (Altogether for the month of [LAST MONTH], how much did [R=FU MEMBER: you [CYEAR FU COUNT>1: and your family living there] / R=PROXY & CYEAR FU COUNT=1: they / R=PROXY & CYEAR FU COUNT>1: the family] pay for each of these transportation related expenses. Do not include costs associated with trips and vacations, which we will ask about later.)
Gasoline?
- ENTER to the nearest dollar.
- If None, ENTER [0]
$ 0 – 999,997

F80C. (Altogether for the month of [LAST MONTH], how much did [R=FU MEMBER: you [CYEAR FU COUNT>1: and your family living there] / R=PROXY & CYEAR FU COUNT=1: they / R=PROXY & CYEAR FU COUNT>1: the family] pay for each of these transportation related expenses. Do not include costs associated with trips and vacations, which we will ask about later.)
Parking and car pool?
- ENTER to the nearest dollar.
- If None, ENTER [0]
$ 0 – 999,997

End Vehicles
F81A. [\texttt{F47=YES}: (Altogether for the month of \texttt{LAST MONTH}, how much did \texttt{R=FU MEMBER: you [CYEAR FU COUNT\textgreater{}1: and your family living there] / R=PROXY & CYEAR FU COUNT\textequal{}1: they / R=PROXY & CYEAR FU COUNT\textgreater{}1: the family} pay for each of these transportation related expenses. Do not include costs associated with trips and vacations, which we will ask about later.) / ALL OTHERS: Altogether for the month of \texttt{LAST MONTH}, how much did \texttt{R=FU MEMBER: you [CYEAR FU COUNT\textgreater{}1: and your family living there] / R=PROXY & CYEAR FU COUNT\textequal{}1: they / R=PROXY & CYEAR FU COUNT\textgreater{}1: the family} pay for each of these transportation related expenses. Do not include costs associated with trips and vacations, which we will ask about later.]

Bus fares and train fares?

- ENTER to the nearest dollar.
- If None, ENTER [0]

\$ 0 – 99,997

F81B. (Altogether for the month of \texttt{LAST MONTH}, how much did \texttt{R=FU MEMBER: you [CYEAR FU COUNT\textgreater{}1: and your family living there] / R=PROXY & CYEAR FU COUNT\textequal{}1: they / R=PROXY & CYEAR FU COUNT\textgreater{}1: the family} pay for each of these transportation related expenses. Do not include costs associated with trips and vacations, which we will ask about later.)

Taxicabs?

- ENTER to the nearest dollar.
- If None, ENTER [0]

\$ 0 – 99,997

F81C. (Altogether for the month of \texttt{LAST MONTH}, how much did \texttt{R=FU MEMBER: you [CYEAR FU COUNT\textgreater{}1: and your family living there] / R=PROXY & CYEAR FU COUNT\textequal{}1: they / R=PROXY & CYEAR FU COUNT\textgreater{}1: the family} pay for each of these transportation related expenses. Do not include costs associated with trips and vacations, which we will ask about later.)

Other transportation costs?

- ENTER to the nearest dollar.
- If None, ENTER [0]

\$ 0 \rightarrow \text{GO TO F82} \ \$ 1 – 99,997

\downarrow

\texttt{F81CSPEC}. What were those other costs?

String 100

F82. In \texttt{PYEAR}, did \texttt{R=FU MEMBER: you [PYEAR FU COUNT\textgreater{}1: and your family living there] / R=PROXY & CYEAR FU COUNT\textequal{}1: they / R=PROXY & PYEAR FU COUNT\textgreater{}1: the family} have any school-related expenses such as:

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

1. Yes to any expense item \quad 5. No \rightarrow \text{GO TO F87}

\downarrow

F83. How much in total were these expenses?

\$ 1 – 999,997
F84. In [PYEAR], were there any other school-related expenses not already covered in the previous question?

1. Yes 5. No → GO TO F87

F85. What other types of school-related expenses did [R=FU MEMBER: you / R=PROXY: they] have?

String 400

F86. Altogether, how much were these other expenses?

$ 1 – 999,997

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 [PYEAR]. Or, if you prefer, the amount [R=FU MEMBER: you / R=PROXY: they] spent in an average week or month in [PYEAR]. How much did [R=FU MEMBER: you [PYEAR FU COUNT>1: and your family living there] / R=PROXY & CYEAR FU COUNT=1: they / R=PROXY & PYEAR FU COUNT>1: the family] spend altogether in [PYEAR] on home repairs and maintenance, including materials plus any costs for hiring a professional?

• ENTER amount here, then SELECT unit of time on next screen (Month, Year)

$ 0 → GO TO F88  $ 1 – 999,997  DK/RF

F87PER. The amount entered is: [F87] per ____

• SELECT the unit of time below

5. Month 6. Year

7. Other-specify (F87PERSPEC. Please specify. (String 100))

F87A. Would it amount to $400 or more?

1. Yes 5. No → GO TO F88

F87B. $1000 or more?  F87C. $100 or more?

1. Yes 5. No

F88. (How much did [R=FU MEMBER: you [PYEAR FU COUNT>1: and your family living there] / R=PROXY & CYEAR FU COUNT=1: they / R=PROXY & PYEAR FU COUNT>1: the family] spend altogether in [PYEAR]…)

On household furnishings and equipment, including household textiles, furniture, floor coverings, major appliances, small appliances and miscellaneous housewares?

• ENTER amount here, then SELECT unit of time on next screen (Month, Year)

$ 0 → GO TO F89  $ 1 – 999,997  DK/RF

F88PER. The amount entered is: [F88] per ____

• SELECT the unit of time below

5. Month 6. Year

7. Other-specify (F88PERSPEC. Please specify. (String 100))

F88A. Would it amount to $500 or more?

1. Yes 5. No → GO TO F89

F88B. $1500 or more?  F88C. $100 or more?

1. Yes 5. No 1. Yes 5. No
F89. (How much did [R=FU MEMBER: you [PYEAR FU COUNT>1: and your family living there] / R=PROXY & CYEAR FU COUNT=1: they / R=PROXY & PYEAR FU COUNT>1: the family] spend altogether in [PYEAR]?)

On clothing and apparel, including footwear, outerwear, and products such as watches or jewelry?
- ENTER amount here, then SELECT unit of time on next screen (Month, Year)

$0 \rightarrow \text{GO TO F90} \quad S 1 – 999,997 \quad \text{DK/RF}

F89PER. The amount entered is: [F89] per __
- SELECT the unit of time below

  5. Month  6. Year

F89A. Would it amount to $700 or more?

  1. Yes  5. No \text{DK/RF} \rightarrow \text{GO TO F90}

F89B. $1500 or more?  F89C. $200 or more?

  1. Yes  5. No

F90. (How much did [R=FU MEMBER: you [PYEAR FU COUNT>1: and your family living there] / R=PROXY & CYEAR FU COUNT=1: they / R=PROXY & PYEAR FU COUNT>1: the family] spend altogether in [PYEAR]?)

On trips and vacations, including transportation, accommodations, and recreational expenses on trips?
- ENTER amount here, then SELECT unit of time on next screen (Month, Year)

$0 \rightarrow \text{GO TO F91} \quad S 1 – 999,997 \quad \text{DK/RF}

F90PER. The amount entered is: [F90] per __
- SELECT the unit of time below

  5. Month  6. Year

F90A. Would it amount to $500 or more?

  1. Yes  5. No \text{DK/RF} \rightarrow \text{GO TO F91}

F90B. $1500 or more?  F90C. $200 or more?

  1. Yes  5. No

F91. (How much did [R=FU MEMBER: you [PYEAR FU COUNT>1: and your family living there] / R=PROXY & CYEAR FU COUNT=1: they / R=PROXY & PYEAR FU COUNT>1: the family] spend altogether in [PYEAR]?)

On recreation and entertainment, including tickets to movies, sporting events, and performing arts and hobbies including exercise, bicycles, trailers, camping, photography, and reading materials? \([F90<>0: \text{Do not include costs associated with the trips and vacations you mentioned previously.}]\)
- ENTER amount here, then SELECT unit of time on next screen (Month, Year)

$0 \rightarrow \text{GO TO SECTION G} \quad S 1 – 999,997 \quad \text{DK/RF}

F91PER. The amount entered is: [F91] per __
- SELECT the unit of time below

  5. Month  6. Year

F91A. Would it amount to $500 or more?

  1. Yes  5. No \text{DK/RF} \rightarrow \text{GO TO SECTION G}

F91B. $1500 or more?  F91C. $200 or more?

  1. Yes  5. No
Section G: Income t-1; Ofum Education

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.

- ENTER [1] to continue

  1. Continue

Farm Income

G1A. CAI CHECKPOINT: WHETHER HEAD IS FARMER OR RanchER ON CURRENT MAIN JOB (JOBTyPE=CMJ & BC28=YES)

1. HEAD IS FARMER/RANCHER ON CMJ

   ALL OTHERS → GO TO G5

G2. What were [your / HEAD’s] total receipts from farming in [PYEAR], including soil bank payments and commodity credit loans?

$ 0 – 9,999,997

G3. What were [your / HEAD’s] total operating expenses, not counting living expenses?

$ 0 – 9,999,997

G4CKPT. CAI CHECKPOINT: WHETHER G2 AND G3 ARE RESPONSE OR NON-RESPONSE

1. G2=DK/RF OR G3=DK/RF

5. ALL OTHERS → CALCULATE G4=G2 minus G3; THEN GO TO G5

G4. (And) what was the net income from farming?

- Receipts: [G2=DK: Don’t Know / G2=RF: Refused / ALL OTHERS: $[G2]]

- Expenses: [G3=DK: Don’t Know / G3=RF: Refused / ALL OTHERS: $[G3]]

$ -999,999 – 9,999,997

Business Income

G5. Did [you / HEAD] [PYEAR FU COUNT>1: or anyone else in the family there] own a business at any time in [PYEAR] or have a financial interest in any business enterprise?

1. Yes

5. No → GO TO G12

G6. How many businesses or financial interests did [R=FU MEMBER: you / R=PROXY: they] have in [PYEAR]?

1. One → GO TO G7A

2. Two

3. Three

4. Four

5. Five

DK/RF → GO TO G12

G7. [FIRST ITERATION: I’ll be asking this next series of questions about each business separately. We can begin with whichever business you choose. / ALL OTHERS: And now some questions about the next business.]

- ENTER [1] to continue

  1. Continue
G7A. Business #[1-5]
What kind of business was that?

String 500

G7B. Business #[1-5]
What was the name of (the/that) business?
• **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.

String 25

G8. Business #[1-5]: [G7B]
Who in the family owned that business?
• **ENTER** all that apply
• **PROBE:** Any others?

1 – 24. [CYNAMF CYNAML, CYAQRTH, CYFUHU]  AQSN list of FU Members w/FUHU=FU, FUMiSPYEAR, MO≥PYEAR, DECD≥PYEAR, MILIT, EDUC, HLTH, OTHR

G9A. Business #[1-5]: [G7B]
Did [you / HEAD] put in any work time for this business in [PYEAR]?
• **PROBE** if inconsistent with employment section

1. Yes  
5. No → GO TO G9BB RULE

↓

G9B. Business #[1-5]: [G7B]
Did you tell me about this work earlier?
**READ employers if needed**

1-10. [EMPLOYER/DK] (List of all [PYEAR] Employers from Employment EHC)

1. Yes, these work hours were reported → GO TO G9BB RULE
5. No, these work hours were not reported

↓

G9J1H. Business #[1-5]: [G7B]
Then I would like to ask you some questions now about this business and [your / HEAD’s] work in it.
• **ENTER [1] to continue**

1. Continue

G9J3H. Business #[1-5]: [G7B]
What sort of work did [you / he / she] do?
• **DO NOT PROBE**

String 500

G9J3AH. Business #[1-5]: [G7B]
What was the official title of [your / HEAD’s] job? (The title that the business used.)
• **DO NOT PROBE**

String 200
G9J4H. Business #1-5: [G7B]
And, how many weeks did [you / he / she] work at this business in [PYEAR]?

1 – 52

G9J5H. Business #1-5: [G7B]
On average, how many hours a week did [you / he / she] work at this business?
- ROUND DOWN for fractions less than ½ (0.5)
- ROUND UP for fractions ½ (0.5) or more

1 – 112

G9J6HMO. Business #1-5: [G7B]
In what month and year did [you / he / she] start working at this business?
- SELECT Month and [Enter] to go to next screen for year
- IF NECESSARY: What would be your best estimate?


G9J6HYR. Business #1-5: [G7B]
- The month entered is: [G9J6HMO]
- ENTER the year below
1901- [PYEAR] Actual year
9997 Before [P2YEAR, DK exact year]

1901 -- [PYEAR] 9997. Before [P2YEAR], DK Exact Year

G9J7H. Business #1-5: [G7B]
In which months during [PYEAR] [were / was] [you / he / she] working at this business?
- ENTER all that apply
- PROBE: Any others?

13. All

G9J8H. Business #1-5: [G7B]
[Have / Has] [you / he / she] stopped working at this business?

1. Yes 5. No → GO TO G9BB RULE

↓

G9J9HMO. Business #1-5: [G7B]
In what month and year was that?
- SELECT Month and [Enter] to go to next screen for year
- IF NECESSARY: What would be your best estimate?

G9J9HYR. Business #[1-5]: [G7B]
The month entered is: [G9J9HMO]
• ENTER the year below
  9996 [PYEAR] or [CYEAR] and DK which
  [PYEAR] [CYEAR] 9996. [PYEAR] – [ CYEAR], DK Which Year

G9J10H. Business #[1-5]: [G7B]
What happened - did it go out of business, did [you / he / she] quit, or what?

String 500

G9BB RULE: WHETHER WIFE/“WIFE” IN FU (CYFUHU=1, 4 & CYAQRTH=202, 222)

WIFE/“WIFE” IN FU  ALL OTHERS → GO TO G10

↓

G9C. Business #[1-5]: [G7B]
Did [you / WIFE/“WIFE”] put in any work time for this business in [PYEAR]?
• PROBE if inconsistent with employment section
  1. Yes  5. No → GO TO G10

↓

G9D. Business #[1-5]: [G7B]
Did you tell me about this work earlier?
  READ employers if needed
  1-10. [EMPLOYER/DK] (List of [PYEAR] Employers from Employment EHC)
  1. Yes, these work hours were reported → GO TO G10  5. No, these work hours were not reported

↓

G9J1W. Business #[1-5]: [G7B]
Then I would like to ask you some questions now about this business and [your / WIFE’s/“WIFE’s” / your wife’s] work in it.
• ENTER [1] to continue
  1. Continue

G9J3W. Business #[1-5]: [G7B]
What sort of work did [you / she] do?
• DO NOT PROBE

String 500

G9J3AW. Business #[1-5]: [G7B]
What was the official title of [your / WIFE’s/“WIFE’s”] job? (The title that the business used.)
• DO NOT PROBE

String 200
G9J4W. Business #[1-5]: [G7B]
And, how many weeks did [you / she] work at this business in [PYEAR]?

1 – 52

G9J5W. Business #[1-5]: [G7B]
On average, how many hours a week did [you / she] work at this business?
- ROUND DOWN for fractions less than ½ (0.5)
- ROUND UP for fractions ½ (0.5) or more

1 – 112

G9J6WMO. Business #[1-5]: [G7B]
In what month and year did [you / she] start working at this business?
- SELECT Month and [Enter] to go to next screen for year
- IF NECESSARY: What would be your best estimate?

<table>
<thead>
<tr>
<th>Month</th>
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<tbody>
<tr>
<td>1. January</td>
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<td>2. February</td>
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<td>22. Spring</td>
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<td>23. Summer</td>
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<td>24. Fall</td>
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</tbody>
</table>

G9J6WYR. Business #[1-5]: [G7B]
- The month entered is: [G9J6WMO]
- ENTER the year below

<table>
<thead>
<tr>
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</tr>
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<tbody>
<tr>
<td>1901 - [PYEAR] Actual year</td>
</tr>
<tr>
<td>9997 Before [P2YEAR, DK exact year]</td>
</tr>
<tr>
<td>1901 - [PYEAR] 9997. Before [P2YEAR], DK Exact Year</td>
</tr>
</tbody>
</table>

G9J7W. Business #[1-5]: [G7B]
In which months during [PYEAR] [were / was] [you / she] working at this business?
- ENTER all that apply
- PROBE: Any others?

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<td>12. December</td>
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<tr>
<td>13. All</td>
</tr>
</tbody>
</table>

G9J8W. Business #[1-5]: [G7B]
[Have / Has] [you / she] stopped working at this business?

1. Yes 5. No → GO TO G10

G9J9WMO. Business #[1-5]: [G7B]
In what month and year was that?
- SELECT Month and [Enter] to go to next screen for year
- IF NECESSARY: What would be your best estimate?

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<td>23. Summer</td>
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<td>24. Fall</td>
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</table>
G9J9WYR. Business #[1-5]: [G7B]
The month entered is: [G9J9WMO]

- ENTER the year below
  9996 [PYEAR] or [CYEAR] and DK which

  [PYEAR] [CYEAR] 9996. [PYEAR] – [CYEAR], DK Which Year

G9J10W. Business #[1-5]: [G7B]
What happened - did it go out of business, did [you / she] quit, or what?

String 500

G10. Business #[1-5]: [G7B]
(Please remind me,) was it a corporation or an unincorporated business?

1. Corporation 2. Unincorporated 7. Other-specify (G10SPEC. Specify (String 100))

GO TO G11C RULE

G11. Business #[1-5]: [G7B]
What were the total receipts from the business?

$ 0 – 9,999,997

G11A. Business #[1-5]: [G7B]
What were the total operating expenses, not counting living expenses?

$ 0 – 9,999,997

G11BCKPT. CAI CHECKPOINT: WHETHER G11 AND G11A ARE RESPONSE OR NON-RESPONSE

1. G11=DK/RF OR G11A= DK/RF 5. ALL OTHERS → GO TO G11C RULE

G11B. Business #[1-5]: [G7B]
(And) what was the net income from the business?

- Receipts: [G11=DK: Don’t Know / G11=RF: Refused / ALL OTHERS: $[G11]]

$ -999,999 – 9,999,997

G11C RULE: NUMBER OF BUSINESSES AT G6

MORE BUSINESSES → REPEAT G7A-G11B; 5. ALL OTHERS → GO TO G73 RULE

Max=5; THEN GO TO G12
Head-Work Income

G12. Did [you / HEAD] earn wages or salaries in [PYEAR] from working on any jobs \([G9A=\text{YES AND G10}=2]\): besides the unincorporated business we have just talked about?

Let me remind you, the jobs we talked about were:

- **READ Employers Head worked for in [PYEAR]:**  
  1-10. [EMPLOYER/DK] \((\text{List of all [PYEAR] Employers from Employment EHC})\)
- IF necessary, review employment history and add: including wages or salaries from the job(s) we already talked about?

1. Yes  \(\rightarrow\) GO TO G13  
5. No

**G12 RULE:** WHETHER HEAD HAD JOB IN [PYEAR] \((\text{BCWTRP1YEAR}=1 \text{ FOR ANY JOB}), \text{ OR DID NOT HAVE JOB IN [PYEAR] BUT WORKED FOR AN INCORPORATED BIZ IN [PYEAR]} \text{ (G9A=\text{YES & G10}=\text{CORPORATION}})\)

1. [PYEAR] JOB  
2. NO [PYEAR] JOB BUT WORKED [PYEAR] FOR CORP BIZ  
5. ALL OTHERS  
\(\rightarrow\) GO TO G16

**G12 HARD CHECK.**

HEAD \([\text{HAS A JOB IN EHC}}\) \([\text{OR}}\] \([\text{WORKED FOR AN INCORPORATED BUSINESS]}\) \([\text{IN [PYEAR] BUT HAS NO WAGES OR SALARY IN G12. PROBE: [Were / Was] there any wage(s) or salary(s) from this / these] job[s]}?\)

If “YES”, PRESS [Enter] or SELECT [Go To], to go to G12 & ENTER [Yes].
If “NO”, SELECT [Supress] to go to G12A & record explanation..

1. Yes  \(\rightarrow\) RETURN TO G12  
5. No

**G12A.** How is it that [you / HEAD] worked in [PYEAR], but did not receive earnings from it?

String 500  
GO TO G16

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

\(\$1 – 9,999,997\)

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

1. Yes  \(\rightarrow\) GO TO G16A  
5. No  \(\rightarrow\) GO TO G17F

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

1. Yes 5. No  \(\rightarrow\) GO TO G18A

**G16A.** Which was that?

- **ENTER all that apply**
- **PROBE:** Any others?

1. Bonuses  
2. Overtime  
3. Tips  
4. Commissions  
7. Other-specify

\(\rightarrow\)

- **G17A.** How much was from bonuses?
- **G17B.** How much was from overtime?
- **G17C.** How much was from tips?
- **G17D.** How much was from commissions?
- **G16B.** What was that other job-related income from?
G17E. How much was from other job related income?

$1 – 999,997

G17F. Reported Incomes: [Wages/salaries, bonus, overtime, tips, commissions, other job-related income]

Did you tell me earlier about all the jobs that go with (this / these) income(s)?

READ employers if needed

1-10. [EMPLOYER/DK] (List of all [PYEAR] Employers from Employment EHC)

1. Yes, R reported all jobs that produced this income → GO TO G18A
2. No, R did not report all jobs that produced this income

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

1. Federal government
2. State government
3. Local government
4. Private non-government
5. Self-employed
6. Other-
specify (G17J1SPEC. Specify (String 100))

G17J2. What was the name of that 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.

String 25

G17J3. What sort of work did [you / he / she] do?

• DO NOT PROBE

String 500

G17J3B. What kind of business or industry was that in?

• DO NOT PROBE

String 500

G17J3C. What was the official title of [your / HEAD’s] job? (The title that [your / his / her] employer used.)

• DO NOT PROBE

String 200

G17J4. And, how many weeks did [you / he / she] work at this in [PYEAR]?

1 – 52
G17J5. On average, how many hours a week did [you / he / she] work?
- ROUND DOWN for fractions less than ½ (0.5)
- ROUND UP for fractions ½ (0.5) or more

1 – 112

G17J6MO. In what month and year did [you / he / she] start this work?
- SELECT Month and [Enter] to go to next screen for year
- IF NECESSARY: What would be your best estimate?

|-------------|------------|-------------|----------|----------|--------|---------|

G17J6YR. The month entered is: [G17J6MO]
- ENTER the year below

9997 Before [P2YEAR], DK exact year

1901 – [PYEAR] 9997. Before [P2YEAR], DK Exact Year

G17J7. In which months during [PYEAR] [were / was] [you / he / she] working at it?
- ENTER all that apply
- PROBE: Any others?

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

1. Yes 5. No → GO TO G18A

G17J9MO. In what month and year was that?
- SELECT Month and [Enter] to go to next screen for year
- IF NECESSARY: What would be your best estimate?

|-------------|------------|-------------|----------|----------|--------|

G17J9YR. The month entered is: [G17J9MO]
- ENTER the year below

9996 [PYEAR] or [CYEAR] and DK which

[PYEAR] [CYEAR] 9996. [PYEAR] – [CYEAR], DK Which Year

G17J10. What happened - did [your / his / her] employer close or go out of business, did [you / he / she] quit, or what?

String 500
Head-Professional Practice or Trade

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 [PYEAR] from professional practice or trade?

1. Yes 5. No → GO TO G18B

↓

G19A. How much was it?

- ENTER amount here, then SELECT unit of time on next screen (Day, Week, Two weeks, Month, Year)

$ 1 – 9,999,997 DK/RF → GO TO G20A

↓

G19APER. The amount entered is: [G19A] per __

- SELECT the unit of time below


7. Other-specify (G19APERSPEC. Specify. (String 100))

G20A. During which months of [PYEAR] did [you / he / she] get this income?

- ENTER all that apply

- PROBE: Any others?


G21ACKPT. Reported Incomes: Professional Practice or Trade

Did you tell me earlier about all the jobs that go with this income?

READ employers if needed

1-10. [EMPLOYER/DK] (List of all [PYEAR] Employers from Employment EHC)

1. Yes, R reported all jobs that produced this income → GO TO G18B

5. No, R did not report all jobs that produced this income

↓

G18AJ1. Then I would like to ask you some questions now about the work [you / he / she] did for this income. Did [you / he / she] work for the federal, state or local government, a private company, or what?

1. Federal government 2. State government 3. Local government

4. Private non-government 5. Self-employed

7. Other-specify (G18AJ1SPEC. Specify (String 100))

G18AJ2. What was the name of that 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.

String 25

G18AJ3. What sort of work did [you / he / she] do?

- DO NOT PROBE

String 500
G18AJ3B. What kind of business or industry was that in?
- DO NOT PROBE
String 500

G18AJ3C. What was the official title of [your / HEAD’s] job? (The title that [your / his / her] employer used.)
- DO NOT PROBE
String 200

G18AJ4. And, how many weeks did [you / he / she] work at this in [PYEAR]?
1 – 52

G18AJ5. On average, how many hours a week did [you / he / she] work?
- ROUND DOWN for fractions less than ½ (0.5)
- ROUND UP for fractions ½ (0.5) or more
1 – 112

G18AJ6MO. In what month and year did [you / he / she] start this work?
- SELECT Month and [Enter] to go to next screen for year
- IF NECESSARY: What would be your best estimate?

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G18AJ6YR. The month entered is: [G18AJ6MO]
- ENTER the year below

9997 Before [P2YEAR], DK exact year
1901 – [PYEAR] 9997. Before [P2YEAR], DK Exact Year

G18AJ7. In which months during [PYEAR] [were / was] [you / he / she] working at it?
- ENTER all that apply
- PROBE: Any others?

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G18AJ8. [Have / Has] [you / he / she] stopped this work?
1. Yes 5. No → GO TO G18B

G18AJ9MO. In what month and year was that?
- SELECT Month and [Enter] to go to next screen for year
- IF NECESSARY: What would be your best estimate?

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G18AJ9YR. The month entered is: [G18AJ9MO]
• ENTER the year below
9996  [PYEAR] or [CYEAR] and DK which
[PYEAR]  [CYEAR] 9996. [PYEAR] – [CYEAR], DK Which Year

G18AJ10. What happened – did it go out of business, did [you / he / she] quit, or what?

String 500

Head-Farming or Market Gardening
G18B. [BC28=YES: Besides the farm income you already told me about,] did [you / HEAD] receive any other income in [PYEAR] from farming or market gardening?

1. Yes  5. No  → GO TO G22CKPT

↓
G19B. How much was it?
• ENTER amount here, then SELECT unit of time on next screen (Day, Week, Two weeks, Month, Year)

$ 1 – 9, 999,997  DK/RF  → GO TO G20B

↓
G19BPER. The amount entered is: [G19B] per __
• SELECT the unit of time below


7. Other-specify (G19BPERSPEC. Specify. (String 100))

G20B. During which months of [PYEAR] did [you / he / she] get this income?
• ENTER all that apply
• PROBE: Any others?


G21BCKPT. Reported Incomes: Farming or Market Gardening
Did you tell me earlier about all the jobs that go with this income?
READ employers if needed

1-10. [EMPLOYER/DK] (List of all [PYEAR] Employers from Employment EHC)

1. Yes, R reported all jobs that produced this income  → GO TO G22CKPT

5. No, R did not report all jobs that produced this income

↓
G18BJ1. Then I would like to ask you some questions now about the work [you / HEAD] did for this income. Did [you / he / she] work for the federal, state or local government, a private company, or what?

1. Federal government  2. State government  3. Local government

4. Private non-government  5. Self-employed

7. Other-specify (G18BJ1SPEC. Specify (String 100))
G18BJ2. What was the name of that 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.

String 25

G18BJ3. What sort of work did [you / he / she] do?
- DO NOT PROBE

String 500

G18BJ3B. What kind of business or industry was that in?
- DO NOT PROBE

String 500

G18BJ3C. What was the official title of [your / HEAD's] job? (The title that [your / his / her] employer used.)
- DO NOT PROBE

String 200

G18BJ4. And, how many weeks did [you / he / she] work at this in [PYEAR]?
1 – 52

G18BJ5. On average, how many hours a week did [you / he / she] work?
- ROUND DOWN for fractions less than ½ (0.5)
- ROUND UP for fractions ½ (0.5) or more
1 – 112

G18BJ6MO. In what month and year did [you / he / she] start this work?
- SELECT Month and [Enter] to go to next screen for year
- IF NECESSARY: What would be your best estimate?


G18AJ6YR. The month entered is: [G18BJ6MO]
- ENTER the year below
9997 Before [P2YEAR], DK exact year

G18BJ7. In which months during [PYEAR] [were / was] [you / he / she] working at it?
- ENTER all that apply
- PROBE: Any others?

G18BJ8. [Have / Has] [you / he / she] stopped this work?

1. Yes  5. No  → GO TO G22CKPT

↓

G18BJ9MO. In what month and year was that?

- SELECT Month and [Enter] to go to next screen for year
- IF NECESSARY: What would be your best estimate?


G18BJ9YR. The month entered is: [G18BJ9MO]

- ENTER the year below

9996  [PYEAR] or [CYEAR] and DK which

[PYEAR]  [CYEAR]  9996. [PYEAR] – [CYEAR], DK Which Year

G18BJ10. What happened - did it go out of business, did [you / he / she] quit, or what?

String 500

G22CKPT. CAI CHECKPOINT: NUMBER OF JOBS IN [PYEAR] AT BC18

1. MORE THAN ONE JOB IN [PYEAR]  5. ALL OTHERS  → GO TO G25A

G23. Did you include [your / HEAD’s] earnings from all of [your / his / her] jobs 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 [PYEAR]?

$ 1 – 9,999,997

Head-Rent

G25A. Did [you / HEAD] receive any (other) income in [PYEAR] from rent?

1. Yes  5. No  → GO TO G25B

G26A. How much was it?

- ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)

$ 1 – 999,997  DK/RF  → GO TO G26A1CKPT

G26APER. The amount entered is: [G26A] per __

- SELECT the unit of time below

3. Week  4. Two weeks  5. Month  6. Year  7. Other-specify (G26APERSPEC. Specify. (String 100))
G26A1CKPT. CAI CHECKPOINT: WHETHER WIFE/“WIFE” IN FU (CYFUHU=1, 4 & CYAQRTH=202, 222)

1. WIFE/“WIFE” IN FU  5. ALL OTHERS → GO TO G27A

G26A2. Does that include [your / your wife’s / WIFE’s/“WIFE’s”] share?

1. Yes  5. No

G27A. During which months of [PYEAR] did [you / HEAD] get this income?

- ENTER all that apply
- PROBE: Any others?


Head-Dividends

G25B. (Did [you / HEAD] receive any other income in [PYEAR]...)

From dividends?

1. Yes  5. No → GO TO G25C

G26B. How much was it?

- ENTER amount here, then SELECT unit of time on next screen (Month, Year)

$ 1 – 999,997  DK/RF → GO TO G26B1CKPT

G26BPER. The amount entered is: [G26B] per __

- SELECT the unit of time below

5. Month  6. Year  7. Other-specify (G26BPERSPEC. Specify. (String 100))

G26B1CKPT. CAI CHECKPOINT: WHETHER WIFE/“WIFE” IN FU (CYFUHU=1, 4 & CYAQRTH=202, 222)

1. WIFE/“WIFE” IN FU  5. ALL OTHERS → GO TO G27B

G26B2. Does that include [your / your wife’s / WIFE’s/“WIFE’s”] dividends?

1. Yes  5. No

G27B. During which months of [PYEAR] did [you / HEAD] get this income?

- ENTER all that apply
- PROBE: Any others?

### Head-Interest

G25C. (Did [you / HEAD] receive any other income in [PYEAR]...)

From interest?

- **1. Yes**
- **5. No** → GO TO G25D

↓

G26C. How much was it?

- **ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)**

$1 – 999,997 DK/RF → GO TO G26C1CKPT

↓

G26CPER. The amount entered is: [G26C] per __

- **SELECT the unit of time below**

3. Week 4. Two weeks 5. Month 6. Year 7. Other-specify (G26CPERSPEC. Specify. (String 100))

G26C1CKPT. CAI CHECKPOINT: WHETHER WIFE/"WIFE" IN FU (CYFUHU=1, 4 & CYAQRTH=202, 222)

1. WIFE/"WIFE" IN FU
- **5. ALL OTHERS** → GO TO G27C

↓

G26C2. Does that include [your / your wife's / WIFE's/"WIFE's"] interest?

- **1. Yes**
- **5. No**

G27C. During which months of [PYEAR] did [you / HEAD] get this income?

- **ENTER all that apply**
- **PROBE:** Any others?


### Head-Trust Funds and Royalties

G25D. (Did [you / HEAD] receive any other income in [PYEAR]...)

From trust funds and royalties?

- **1. Yes**
- **5. No** → GO TO G25E RULE

↓

G26D. How much was it?

- **ENTER amount here, then SELECT unit of time on next screen (Month, Year)**

$1 – 999,997 DK/RF → GO TO G27D

↓

G26DPER. The amount entered is: [G26D] per __

- **SELECT the unit of time below**

5. Month 6. Year 7. Other-specify (G26DPERSPEC. Specify. (String 100))
G27D. During which months of [PYEAR] did [you / HEAD] get this income?

- ENTER all that apply
- PROBE: Any others?


Head-TANF
G25ECKPT. WHETHER HEAD WAGES/SALARY in [PYEAR] IS <= $25,000 OR DK/RF (G13)

1. G13 ≤ $25,000, DK/RF  5. ALL OTHERS  → GO TO G31

G25E. (Did [you / HEAD] receive any income in [PYEAR]...)
From TANF (Temporary Assistance for Needy Families) [PYSTATEID<>FC/DK/RF: or [STATEPROG]] formerly called ADC or AFDC?

1. Yes  5. No  → GO TO G25F

G26E. How much was it?

- ENTER amount here, then SELECT unit of time on next screen (Two weeks, Month, Year)

$ 1 – 999,997  DK/RF  → GO TO G27E

G26EPER. The amount entered is: [G26E] per __

- SELECT the unit of time below

4. Two weeks  5. Month  6. Year  7. Other-specify (G26EPERSPEC. Specify. (String 100))

G27E. During which months of [PYEAR] did [you / HEAD] get this income?

- ENTER all that apply
- PROBE: Any others?


G27EE. Who in the family was covered by this?

- ENTER all that apply
- PROBE: Any others?

1 – 24. [CYNAMF CYNAML, CYAQRTH, CYFUHU] AQSNI list of FU Members w/FUHU=FU, FUMISPYEAR, MO≥PYEAR, DECD≥PYEAR, MILIT, EDUC, HLTH, OTHR)

Head-SSI
G25F. (Did [you / HEAD] receive any income in [PYEAR]...)
From Supplemental Security Income?

- SSI (Supplemental Security Income) is not Social Security, nor is it Social Security Disability Insurance (SSDI), although the Social Security Administration administers the program and a person can receive both. See F1-Help for more information.

1. Yes  5. No  → GO TO G25G
G25FF. Did [you / HEAD] receive it for [yourself / himself / herself], or for someone else?

1. Self → GO TO G26F
2. Someone else
3. Both → DK/RF → GO TO G26F

↓

G25FFF. Let’s talk about the other person’s Supplemental Security when we talk about their income.

- ENTER [1] to continue

1. Continue

G25F4 RULE: WHETHER SSI FOR SOMEONE ELSE (G25FF=2) OR BOTH (G25FF=3)

- SOMEONE ELSE → GO TO G25G
- BOTH → GO TO G26F

↓

G26F. How much was [G25FF=SELF: it / ALL OTHERS: the Supplemental Security Income [you / he / she] received for [yourself / himself / herself]]?

- ENTER amount here, then SELECT unit of time on next screen (Month, Year)

$1 – 999,997 → DK/RF → GO TO G27F

↓

G26FPER. The amount entered is: [G26F] per ___

- SELECT the unit of time below

  5. Month
  6. Year
  7. Other-specified (G26FPERSPEC. Specify. (String 100))

G27F. During which months of [PYEAR] did [you / HEAD] get this income?

- ENTER all that apply
- PROBE: Any others?


Head-Other Welfare

G25G. (Did [you / HEAD] receive any income in [PYEAR]...)

From other welfare?

1. Yes 5. No → GO TO G31

↓

G26G. How much was it?

- ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)

$1 – 999,997 → DK/RF → GO TO G27G

↓

G26GPER. The amount entered is: [G26G] per ___

- SELECT the unit of time below

  3. Week
  4. Two weeks
  5. Month
  6. Year
  7. Other-specified (G26GPERSPEC. Specify. (String 100))
G27G. During which months of [PYEAR] did [you / HEAD] get this income?
- ENTER all that apply
- PROBE: Any others?


**Head-Social Security**

G31. Did [you / HEAD] [PYEAR FU COUNT>1: or anyone else in the family there] receive any income in [PYEAR] 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?
- ENTER all that apply
- PROBE: Any others?

1 – 24. [CYNAMF CYNAML, CYAQRTH, CYFUHU] AQSN list of HEAD if FUHU=FU, FUMI; W/"W" if FUHU=FU, FUMI; OFUM if FUHU=FU, FUMI≤PY; OFUM if FUHU=FU, FUMI≤PY; OFUM if FUHU=FU, FUMI≤PY; DECD≤PY

G33A. [First / Next] let me ask about [your / G32’s] Social Security.

Was that disability, retirement, survivor’s benefits, or what?
- ENTER all that apply
- PROBE: Any others?

6. Dependent of retired recipient 7. Other-specify (G33ASPEC. Specify. (String 100))

G34. How much was the total amount from Social Security? [2+ SOCSEC INCOMES: Please include all amounts from all types of Social Security [you / [G32]] received in [PYEAR].]
- ENTER amount here, then SELECT unit of time on next screen (Month, Year)

$ 1 – 999,997 DK/RF → GO TO G35

↓

G34PER. The amount entered is: [G34] per __
- SELECT the unit of time below

5. Month 6. Year 7. Other-specify (G34PERSPEC. Specify. (String 100))

G35. During which months of [PYEAR] did [you / G32] get this income? [2+ SOCSEC INCOMES: (This includes all types of Social Security [you / [G32]] received in [PYEAR].)]
- ENTER all that apply
- PROBE: Any others?

G35 RULE: WHETHER MORE INDIVIDUALS RECEIVE SOCIAL SECURITY AT G32

MORE FU MEMBERS → REPEAT G33A-G35; ALL OTHERS

Head-VA Pensions

G37A. Did [you / HEAD] receive any income in [PYEAR] from the Veteran's Administration for a servicemen's, [MALE HEAD: (widow's,)] / FEMALE HEAD: widow's,] or survivor's pension, service disability, or the GI bill?
  • ENTER all that apply
  • PROBE: Any others?
    1. Yes, servicemen's, widow's, or survivor's pension
    2. Yes, service disability
    3. Yes, GI bill
    4. Yes, other-specify (G37ASPEC. Specify. (String 100))
    5. No

GO TO G39

G38. How much was the total amount? [2+ VA INCOMES: Please include all amounts from all types of VA (Veteran's Administration) income [you / he / she] received in [PYEAR].]
  • ENTER amount here, then SELECT unit of time on next screen (Month, Year)
    $ 1 – 999,997 → GO TO G39

G38PER. The amount entered is: [G38] per __
  • SELECT the unit of time below
    5. Month
    6. Year
    7. Other-specify (G38PERSPEC. Specify. (String 100))

G39. During which months of [PYEAR] did [you / HEAD] get this income? [2+ VA INCOMES: (This includes all types of VA (Veteran's Administration) income [you / he / she] received in [PYEAR].)]
  • ENTER all that apply
  • PROBE: Any others?
    1. January
    2. February
    3. March
    4. April
    5. May
    6. June
    7. July
    8. August
    9. September
    10. October
    11. November
    12. December
    13. All

Head-Other Retirement

G40. Did [you / HEAD] receive any income in [PYEAR] from other retirement pay, pensions, IRAs or annuities?
  • ENTER all that apply
  • PROBE: Any others?
    1. Yes, retirement pay, pensions
    2. Yes, annuities
    3. Yes, other-specify
    4. Yes, IRAs
    5. No

ASK G41B-G42B, G43

ASK G41C-G42C, G43

ASK G41D-G42D, G43

GO TO G44A

G40=Retirement Pay, Pensions

ASK G41A-G42A, G43

G41A. How much was from retirement pay or pensions?
  • ENTER amount here, then SELECT unit of time on next screen (Month, Year)
    $ 1 – 999,997 → GO TO G42A

G41APER. The amount entered is: [G41A] per __
  • SELECT the unit of time below
    5. Month
    6. Year
    7. Other-specify (G41APERSPEC. Specify. (String 100))
**G42A.** During which months of [PYEAR] did [you / he / she] get this income?
- **ENTER all that apply**
- **PROBE:** Any others?
  1. January  
  2. February  
  3. March  
  4. April  
  5. May  
  6. June  
  7. July  
  8. August  
  9. September  
  10. October  
  11. November  
  12. December  
  13. All

**G41B.** How much was from annuities?
- **ENTER amount here, then SELECT unit of time on next screen (Month, Year)**
  
  $1 – 999,997  DK/RF  \rightarrow  \text{GO TO G42B}$

\[\downarrow\]

**G41BPER.** The amount entered is: [G41B] per __
- **SELECT the unit of time below**
  5. Month  
  6. Year  
  7. Other-specify (G41BPERSPEC. Specify. (String 100))

**G42B.** During which months of [PYEAR] did [you / HEAD] get this income?
- **ENTER all that apply**
- **PROBE:** Any others?
  1. January  
  2. February  
  3. March  
  4. April  
  5. May  
  6. June  
  7. July  
  8. August  
  9. September  
  10. October  
  11. November  
  12. December  
  13. All

**G40=Other**

**G41C.** How much was the other income?
- **ENTER amount here, then SELECT unit of time on next screen (Month, Year)**
  
  $1 – 999,997  DK/RF  \rightarrow  \text{GO TO G41C1}$

\[\downarrow\]

**G41CPER.** The amount entered is: [G41C] per __
- **SELECT the unit of time below**
  5. Month  
  6. Year  
  7. Other-specify (G41CPERSPEC. Specify. (String 100))

**G41C1.** What was that from?

String 200

**G42C.** During which months of [PYEAR] did [you / he / she] get this income?
- **ENTER all that apply**
- **PROBE:** Any others?
  1. January  
  2. February  
  3. March  
  4. April  
  5. May  
  6. June  
  7. July  
  8. August  
  9. September  
  10. October  
  11. November  
  12. December  
  13. All
G40=IRAs

G41D. How much was from IRAs?
- ENTER amount here, then SELECT unit of time on next screen (Month, Year)
  $1 – 999,997  DK/RF → GO TO G42D

G41DPER. The amount entered is: [G41D] per __
- SELECT the unit of time below
  5. Month  6. Year  7. Other-specify (G41DPERSPEC. Specify. (String 100))

G42D. During which months of [PYEAR] did [you / he / she] get this income?
- ENTER all that apply
- PROBE: Any others?

G43. (Not including Veteran’s Administration pensions,) how many different pensions, IRAs or annuities did [you / HEAD] receive income from in [PYEAR]?
- FOR 7 or more, ENTER [7]
  1 – 7

Head-Unemployment Comp

G44A. Did [you / HEAD] receive any income in [PYEAR] from unemployment compensation?
  1. Yes  5. No  → GO TO G44B

G45A. How much was it?
- ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)
  $1 – 999,997  DK/RF → GO TO G46A

G45APER. The amount entered is: [G45A] per __
- SELECT the unit of time below
  3. Week  4. Two weeks  5. Month  6. Year  7. Other-specify (G45APERSPEC. Specify. (String 100))

G46A. During which months of [PYEAR] did [you / he / she] get this income?
- ENTER all that apply
- PROBE: Any others?
Head-Workers Comp
G44B. (Did [you / HEAD] receive any income in [PYEAR]...) From workers compensation?
1. Yes 5. No → GO TO G44C
↓
G45B. How much was it?
- ENTER amount here, then SELECT unit of time on next screen (Month, Year)
$1 – 999,997 [DK/RF] → GO TO G46B
↓
G45BPER. The amount entered is: [G45B] per __
- SELECT the unit of time below
5. Month 6. Year 7. Other-specify (G45BPERSPEC. Specify (String 100))

G46B. During which months of [PYEAR] did [you / he / she] get this income?
- ENTER all that apply
- PROBE: Any others?

Head-Child Support
G44C. (Did [you / HEAD] receive any income in [PYEAR]...) From child support?
1. Yes 5. No → GO TO G44D
↓
G45C. How much was it?
- ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)
$1 – 999,997 [DK/RF] → GO TO G46C
↓
G45CPER. The amount entered is: [G45C] per __
- SELECT the unit of time below
3. Week 4. Two weeks 5. Month 6. Year 7. Other-specify (G45CPERSPEC. Specify (String 100))

G46C. During which months of [PYEAR] did [you / he / she] get this income?
- ENTER all that apply
- PROBE: Any others?
Head-Alimony or Separate Maintenance
G44D. (Did [you / HEAD] receive any income in [PYEAR]...)
From alimony or separate maintenance?
1. Yes   5. No → GO TO G44E
↓
G45D. How much was it?
• ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)
$ 1 – 999,997 DK/RF → GO TO G46D
↓
G45DPER. The amount entered is: [G45D] per __
• SELECT the unit of time below
  3. Week   4. Two weeks   5. Month   6. Year   7. Other-specify (G45DPERSPEC. Specify. (String 100))

G46D. During which months of [PYEAR] did [you / he / she] get this income?
• ENTER all that apply
• PROBE: Any others?

Head-Help From Relatives
G44E. Did [you / HEAD] receive any help in [PYEAR] from relatives?
• This must be from non-FU members.
1. Yes   5. No → GO TO G44F
↓
G45E. How much was it?
• ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)
$ 1 – 999,997 DK/RF → GO TO G46E
↓
G45EPER. The amount entered is: [G45E] per __
• SELECT the unit of time below
  3. Week   4. Two weeks   5. Month   6. Year   7. Other-specify (G45EPERSPEC. Specify. (String 100))

G46E. During which months of [PYEAR] did [you / he / she] get this income?
• ENTER all that apply
• PROBE: Any others?
Head-Help From Non-Relatives
G44F. Did anyone (else) not living with [you / HEAD] help [you / HEAD] [PYEAR FU COUNT>1] and [your / his / her] family out by giving [you / him / her] money during [PYEAR]?
   • This must be from non-FU members.
     1. Yes  5. No → GO TO G44G

G45F. How much was it?
   • ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)
     $1 – 999,997 DK/RF → GO TO G46F

G45FPER. The amount entered is: [G45F] per __
   • SELECT the unit of time below
     3. Week  4. Two weeks  5. Month  6. Year
     7. Other-specify (G45FPERSPEC. Specify. (String 100))

G46F. During which months of [PYEAR] did [you / he / she] get this income?
   • ENTER all that apply
   • PROBE: Any others?

Head-Anything Else
G44G. Did [you / HEAD] receive any other income in [PYEAR] from anything else?
   1. Yes  5. No → GO TO G49CKPT

G45G1. What was that from?
   • IF R mentions income from a job, probe for these details:
   • OCC / IND: What was [your / his / her] occupation? What sort of work did [you / he / she] do?
   • Start / End: What month and year did [you / he / she] start that job? End that job?
   • Job Title / Commute: What was [your / his / her] official job title? On a typical day, how many minutes was [your / his / her] round trip commute to and from work?
   • Work hours: How many weeks did [you / he / she] work at that job in [PYEAR]? On average, how many hours per week did [you / he / she] work in [PYEAR]?

Open end

G45G. How much was the income from that?
   • ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)
     $1 – 999,997 DK/RF → GO TO G46G

G45GPER. The amount entered is: [G45G] per __
   • SELECT the unit of time below
     3. Week  4. Two weeks  5. Month  6. Year  7. Other-specify (G45GPERSPEC. Specify. (String 100))
G46G. During which months of [PYEAR] did [you / he / she] get this income?
- ENTER all that apply
- PROBE: Any others?

- January
- February
- March
- April
- May
- June
- July
- August
- September
- October
- November
- December
- All

**Income of Wife/“Wife”**

G49CKPT. CAI CHECKPOINT: WHETHER WIFE/“WIFE” IN FU (CYFUHU=1, 4 & CYAQRTH=202, 222)

1. WIFE/“WIFE” IN FU  → GO TO G73 RULE
5. ALL OTHERS

G50. Did [you / WIFE/“WIFE”] receive any income during [PYEAR]?

1. Yes  → GO TO G51ABCKPT
5. No

G51A. Was any of it earnings from [your / her] work [G9C=YES AND G10=2: besides the unincorporated business we talked about a few minutes ago]?

1. Yes  → GO TO G52
5. No

G51ABCKPT. CAI CHECKPOINT: WHETHER WIFE/“WIFE” HAD JOB IN [PYEAR] (DEWTRP1YEAR=1 FOR ANY JOB), OR DID NOT HAVE JOB IN [PYEAR] BUT WORKED FOR AN INCORPORATED BIZ IN [PYEAR] (G9C=YES & G10=CORPORATION)

1. [PYEAR] JOB 2. NO [PYEAR] JOB BUT WORKED [PYEAR] FOR CORP BIZ 5. ALL OTHERS

G51B. Did [you / she] receive any earnings from [your / her] work [G5=NO OR G9C=NO, DK AND G10=CORP: at: / G9C=YES AND G10= CORP: the incorporated business you mentioned earlier, or at: ]?

READ employers Wife/“Wife” worked for in [PYEAR]:
1-10. [EMPLOYER/DK] (List of all [PYEAR] Employers from Employment EHC)

1. Yes  → GO TO G52
5. No

G51C. How is it that [you / she] worked, but did not receive earnings from it?

String 500

GO TO G53

**Wife/“Wife”-Work Income**

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

$ 1 – 9,999,997
G52A. During which months of [PYEAR] did [you / she] get this income?

- **ENTER all that apply**
- **PROBE:** Any others?


G52BCKPT. **Reported incomes: Wages / Salaries**

Did you tell me earlier about all the jobs that go with this income?

READ employers if needed

1-10. [EMPLOYER/DK] (List of all [PYEAR] Employers from Employment EHC)

1. Yes, R reported all jobs that produced this income → GO TO G52C RULE 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?


G52J2. What was the name of that 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 the data from the study.
- **IF no employer name is given by R, ask for job title or anything that can help identify the job.**

String 25

G52J3. What sort of work did [you / she] do?

- **DO NOT PROBE**

String 500

G52J3B. What kind of business or industry was that in?

- **DO NOT PROBE**

String 500

G52J3C. What was the official title of [your / WIFE’s/”WIFE’s”] job? (The title that [your / her] employer used.)

- **DO NOT PROBE**

String 200

G52J4. And, how many weeks did [you / she] work at this in [PYEAR]?

1 – 52

G52J5. On average, how many hours a week did [you / she] work?

- **ROUND DOWN for fractions less than ½ (0.5)**
- **ROUND UP for fractions ½ (0.5) or more**

1 – 112
GS2J6MO. In what month and year did [you / she] start this work?

- SELECT Month and [Enter] to go to next screen for year
- IF NECESSARY: What would be your best estimate?

|------------|-------------|----------|----------|--------|---------|

GS2J6YR. The month entered is: [GS2J6MO]
- ENTER the year below
  9997 Before [P2YEAR], DK exact year

| 1901 – [PYEAR] | 9997. Before [P2YEAR], DK Exact Year |

GS2J7. In which months during [PYEAR] [were / was] [you / she] working at it?

- ENTER all that apply
- PROBE: Any others?

|------------|-------------|----------|----------|--------|---------|

GS2J8. [Have / Has] [you / she] stopped this work?

1. Yes 5. No → GO TO GS2C RULE

GS2J9. In what month and year was that?

- SELECT Month and [Enter] to go to next screen for year
- IF NECESSARY: What would be your best estimate?

|------------|-------------|----------|----------|--------|---------|

G17J9YR. The month entered is: [G17J9MO]
- ENTER the year below
  9996 [PYEAR] or [CYEAR] and DK which

| [PYEAR] | [CYEAR] | 9996. [PYEAR] – [CYEAR], DK Which Year |

GS2J10. What happened - did [your / her] employer close or go out of business, did [you / she] quit, or what?

String 500

GS52C RULE: WHETHER WIFE/"WIFE" HAD INCOME IN [PYEAR] (G50=YES OR G51B=YES)

WIFE/"WIFE" HAD INCOME IN [PYEAR] 5. ALL OTHERS → GO TO G73 RULE

↓
Wife/"Wife"-Unemployment Comp

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

1. Yes  5. No  → GO TO G56

↓

G54. How much was that?

- ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)

$ 1 – 999,997  DK/RF  → GO TO G55

↓

G54PER. The amount entered is: [G54] per __

- SELECT the unit of time below

3. Week  4. Two weeks  5. Month  6. Year  7. Other-specify (G54PERSPEC. Specify. (String 100))

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

- ENTER all that apply
- PROBE: Any others?


Wife/"Wife"-Workers Comp

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

1. Yes  5. No  → GO TO G59

↓

G57. How much was that?

- ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)

$ 1 – 999,997  DK/RF  → GO TO G58

↓

G57PER. The amount entered is: [G57] per __

- SELECT the unit of time below

3. Week  4. Two weeks  5. Month  6. Year  7. Other-specify (G57PERSPEC. Specify. (String 100))

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

- ENTER all that apply
- PROBE: Any others?


Wife/"Wife"-Rent, Dividends, Interest, Trust Funds, or Royalties

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

- ENTER all that apply
- PROBE: Any others?

1. Yes, rent  2. Yes, dividends  3. Yes, interest  4. Yes, trust funds or royalties  5. No

G59=Rent

G59A. How much was the rent?

- ENTER amount here, then SELECT unit of time on next screen (Month, Year)

$ 1 – 999,997 DK/RF → GO TO G59AA RULE

↓

G59APER. The amount entered is: [G59A] per __

- SELECT the unit of time below

  5. Month
  6. Year
  7. Other-specify (G59APERSPEC. Specify. [String 100])

G59A3 RULE: WHETHER HEAD REPORTED RENT (G25A=YES)

HEAD REPORTED RENT 5. ALL OTHERS → 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 [PYEAR] did [you / she] get this income?

- ENTER all that apply

- PROBE: Any others?

  1. January
  2. February
  3. March
  4. April
  5. May
  6. June
  7. July
  8. August
  9. September
  10. October
  11. November
  12. December
  13. All

G59=Dividends

G59B. How much were the dividends?

- ENTER amount here, then SELECT unit of time on next screen (Month, Year)

$ 1 – 999,997 DK/RF → GO TO G59BB RULE

↓

G59BPER. The amount entered is: [G59B] per __

- SELECT the unit of time below

  5. Month
  6. Year
  7. Other-specify (G59BPERSPEC. Specify. [String 100])

G59B3 RULE: WHETHER HEAD REPORTED DIVIDENDS (G25B=YES)

HEAD REPORTED DIVIDENDS 5. ALL OTHERS → 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 [PYEAR] did [you / she] get this income?
- ENTER all that apply
- PROBE: Any others?

G59C. How much was the interest?
- ENTER amount here, then SELECT unit of time on next screen (Month, Year)
  $ 1 – 999,997 DK/RF → GO TO G59CC RULE
  ↓
  G59CPER. The amount entered is: [G59C] per __
  - SELECT the unit of time below
    5. Month  6. Year  7. Other-specify (G59CPERSPEC. Specify. (String 100))

G59C3 RULE: WHETHER HEAD REPORTED INTEREST (G25C=YES)
  HEAD REPORTED INTEREST  5. ALL OTHERS → 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 [PYEAR] did [you / she] get this income?
- ENTER all that apply
- PROBE: Any others?

G59D. How much did [you / she] receive from trust funds or royalties?
- ENTER amount here, then SELECT unit of time on next screen (Month, Year)
  $ 1 – 999,997 DK/RF → GO TO G59D4
  ↓
  G59DPER. The amount entered is: [G59D] per __
  - SELECT the unit of time below
    5. Month  6. Year  7. Other-specify (G59DPERSPEC. Specify. (String 100))

G59D4. During which months of [PYEAR] did [you / she] get this income?
- ENTER all that apply
- PROBE: Any others?
Wife/"Wife"-SSI, TANF, Child Support or Other Welfare

G60CKPT. CAI CHECKPOINT: WHETHER WIFE/"WIFE" WAGES/SALARY in [PYEAR] IS <=$25,000 OR DK/RF (G52)

1. G52 <= $25,000, DK/RF
5. ALL OTHERS

G60. Did [you / she] receive any (other) income in [PYEAR] from [G52 <= $25,000]: Supplemental Security Income, TANF (Temporary Assistance for Needy Families) [PYSTATE RESID<>FC/DK/RF: or [STATEPROG]] formerly called ADC or AFDC, child support [G52 <= $25,000: or other welfare]?

- ENTER all that apply
- PROBE: Any others?
- SSI (Supplemental Security Income) is not Social Security, nor is it Social Security Disability Insurance (SSDI), although the Social Security Administration administers the program and a person can receive both. See F1-Help for more information.

Valid for G60Ckpt=1 only
Valid for G60Ckpt=1 only
Valid for G60Ckpt=1 only

1. Yes, SSI
2. Yes, TANF / [STATEPROG]/ADC/AFDC
3. Yes, child support
4. Yes, other welfare
5. No

ASK G60A1-G60A5
ASK G60A1-G60A5
ASK G60A1-G60A5

G60A1. Did [you / she] receive the SSI for [yourself / herself], or for someone else?

- SSI (Supplemental Security Income) is not Social Security, nor is it Social Security Disability Insurance (SSDI), although the Social Security Administration administers the program and a person can receive both. See F1-Help for more information.

1. Self → GO TO G60A4
2. Someone else
3. Both DK/RF → GO TO G60A4

G60A2. Let’s talk about the other person’s Supplemental Security when we talk about their income.

- ENTER [1] to continue
- 1. Continue

G60A3 RULE: WHETHER SSI FOR SOMEONE ELSE (G60A1=2) OR BOTH (G60A1=3)

SOMEONE ELSE → GO TO NEXT G60 ITEM; BOTH THEN GO TO G60A5


- ENTER amount here, then SELECT unit of time on next screen (Month, Year)
- SSI (Supplemental Security Income) is not Social Security, nor is it Social Security Disability Insurance (SSDI), although the Social Security Administration administers the program and a person can receive both. See F1-Help for more information.

$ 1 – 999,997 DK/RF → GO TO G60A5

G60APER. The amount entered is: [G60A4] per __

- SELECT the unit of time below
  5. Month  6. Year  7. Other-specify (G60APERSPEC. Specify. (String 100))
G60A5. During which months of [PYEAR] did [you / she] get this income?

- ENTER all that apply
- PROBE: Any others?


G60B. How much did [you / she] receive from TANF ( Temporary Assistance for Needy Families) [PYSTATERESIDE<>FC/DK/RF: or [STATEPROG]] in [PYEAR]?

- ENTER amount here, then SELECT unit of time on next screen (Month, Year)

$ 1 – 999,997

DK/RF → GO TO G60BB

↓

G60BPERR. The amount entered is: [G60B] per __

- SELECT the unit of time below

5. Month 6. Year 7. Other-specify (G60BPERSPEC. Specify. [String 100])

G60BB. During which months of [PYEAR] did [you / she] get this income?

- ENTER all that apply
- PROBE: Any others?


G60BBB. Who in the family was covered by this?

- ENTER all that apply
- PROBE: Any others?

1 -- 24. [CYNAMF CYNAML, CYAQRTH, CYFUHU] AQSNU list of FU Members w/FUHU=FU, FUMISPYEAR, MO>PYEAR, DECdjPYEAR, MILT, EDUC, HLTH, OTHR

G60C. How much did [you / she] receive from child support in [PYEAR]?

- ENTER amount here, then SELECT unit of time on next screen (Month, Year)

$ 1 – 999,997

DK/RF → GO TO G60CC

↓

G60CPERR. The amount entered is: [G60C] per __

- SELECT the unit of time below

5. Month 6. Year 7. Other-specify (G60CPERSPEC. Specify. [String 100])

G60CC. During which months of [PYEAR] did [you / she] get this income?

- ENTER all that apply
- PROBE: Any others?

G60 = Other Welfare

G60D. How much did [you/she] receive from other welfare in [PYEAR]?

- ENTER amount here, then SELECT unit of time on next screen (Month, Year)

$1 – 999,997 DK/RF → GO TO G60DD

↓

G60DPER. The amount entered is: [G60D] per __

- SELECT the unit of time below

5. Month 6. Year 7. Other-specify (G60DPERSPEC. Specify. [String 100])

G60DD. During which months of [PYEAR] did [you/she] get this income?

- ENTER all that apply
- PROBE: Any others?


Wife/“Wife”-Pensions or Annuities

G61. Did [you/she] receive any (other) income in [PYEAR] from retirement pay, pensions, IRAs or annuities?

- ENTER all that apply
- PROBE: Any others?


ASK G61A-G61B

G61 = Retirement Pay, Pensions

G61A. How much was from retirement pay or pensions?

- ENTER amount here, then SELECT unit of time on next screen (Month, Year)

$1 – 999,997 DK/RF → GO TO G61B

↓

G61APER. The amount entered is: [G61A] per __

- SELECT the unit of time below

5. Month 6. Year 7. Other-specify (G61PERSPEC. Specify. [String 100])

G61B. During which months of [PYEAR] did [you/she] get this income?

- ENTER all that apply
- PROBE: Any others?


G61 = Annuities

G61C. How much was from annuities?

- ENTER amount here, then SELECT unit of time on next screen (Month, Year)

$1 – 999,997 DK/RF → GO TO G61D

↓
G61CPER. The amount entered is: [G61C] per __
- SELECT the unit of time below
  5. Month 6. Year 7. Other-specify (G61CPERSPEC. Specify. (String 100))

G61D. During which months of [PYEAR] did [you / she] get this income?
- ENTER all that apply
- PROBE: Any others?

1. January
2. February
3. March
4. April
5. May
6. June
7. July
8. August
9. September
10. October
11. November
12. December
13. All

G61=IRAs

G61E. How much was from IRAs?
- ENTER amount here, then SELECT unit of time on next screen (Month, Year)

$ 1 – 999,997 DK/RF → GO TO G61F

↓

G61EPER. The amount entered is: [G61E] per __
- SELECT the unit of time below
  5. Month 6. Year 7. Other-specify (G61EPERSPEC. Specify. (String 100))

G61F. During which months of [PYEAR] did [you / she] get this income?
- ENTER all that apply
- PROBE: Any others?

1. January
2. February
3. March
4. April
5. May
6. June
7. July
8. August
9. September
10. October
11. November
12. December
13. All

G61=Other

G61G. How much was the other (retirement) income?
- ENTER amount here, then SELECT unit of time on next screen (Month, Year)

$ 1 – 999,997 DK/RF → GO TO G61G1

↓

G61GPER. The amount entered is: [G61G] per __
- SELECT the unit of time below
  5. Month 6. Year 7. Other-specify (G61GPERSPEC. Specify. (String 100))

G61G1. What was that from?

String 200

G61H. During which months of [PYEAR] did [you / she] get this income?
- ENTER all that apply
- PROBE: Any others?

1. January
2. February
3. March
4. April
5. May
6. June
7. July
8. August
9. September
10. October
11. November
12. December
13. All
Wife/”Wife”-Help From Relatives or Friends
G62. Did [you / she] receive any help in [PYEAR] from relatives or friends?
- This must be from a non-FU member
- ENTER all that apply
- PROBE: Any others?

1. Yes, relatives  2. Yes, friends  5. No
ASK G62A-G62A  ASK G62B-G62BB  GO TO G63

G62=Relatives
G62A. How much was from relatives?
- ENTER amount here, then SELECT unit of time on next screen (Month, Year)

$1 – 999,997 DK/RF → GO TO G62AA

↓
G62APER. The amount entered is: [G62A] per __
- SELECT the unit of time below
  5. Month  6. Year  7. Other-specify (G62APERSPEC. Specify. (String 100))

G62AA. During which months of [PYEAR] did [you / she] get this income?
- ENTER all that apply
- PROBE: Any others?

G62=Friends
G62B. How much was from friends?
- ENTER amount here, then SELECT unit of time on next screen (Month, Year)

$1 – 999,997 DK/RF → GO TO G62BB

↓
G62BPERS. The amount entered is: [G62B] per __
- SELECT the unit of time below
  5. Month  6. Year  7. Other-specify (G62BPERSPEC. Specify. (String 100))

G62BB. During which months of [PYEAR] did [you / she] get this income?
- ENTER all that apply
- PROBE: Any others?
**Wife/**“Wife”-Other Income**

G63. Any other income?

1. Yes  5. No \(\rightarrow\) GO TO G73 RULE

↓

**G63A. What was it from?**

- IF R mentions income from a job, PROBE for these details:
  - Occ/Ind: What was [your / her] occupation? What sort of work did [you / she] do?
  - Start/End: What month and year did [you / she] start that job? End that job?
  - Job Title / Commute: What was [your / her] official job title? On a typical day, how many minutes was [your / her] round trip commute to and from work?
  - Work Hours: How many weeks did [you / she] work at that job in [PYEAR]? On average, how many hours per week did [you / she] work in [PYEAR]?

**Open end**

G63B. How much did that amount to in [PYEAR]?

- ENTER amount here, then SELECT unit of time on next screen (Month, Year)

$$1 – 999,997 \ \text{DK/RF} \ \rightarrow\text {GO TO G63C}$$

↓

**G63BPER. The amount entered is: [G63B] per __**

- SELECT the unit of time below

5. Month    6. Year    7. Other-specify (G63BPERSPEC. Specify. [String 100])

G63C. During which months of [PYEAR] did [you / she] get this income?

- ENTER all that apply
- PROBE: Any others?


**Big OFUM Series**

G73CKPT. CAI CHECKPOINT: WHETHER THERE ARE ELIGIBLE 16+ YEAR OLD FU MEMBERS...

1. OFUM NOW IN FU (FUP1YEAR[I].AGEIWDATE>15 OR COVERSCREEN.AGEGE16[I]=YES & FUP1YEAR[I].AQRTH.ORD>222 & FUP1YEAR[I].FUHU=FU, FUMI)
2. LAST WAVE OFUM NOT IN FU (FUP1YEAR[I].AGEIWDATE>15 OR COVERSCREEN.AGEGE16[I]=YES & FUP1YEAR[I].AQRTH.ORD>222 & FUP1YEAR[I].FUHU=M_O, JAIL, MIL, EDUC, HEALTH, OTHER) OR
3. LAST WAVE H/W/”W” NOT IN FU (FUP1YEAR[I].AGEIWDATE>15 OR COVERSCREEN.AGEGE16[I]=YES & FUP1YEAR[I].AQRTH.ORD<223 & FUP1YEAR[I].FUHU=M_O, JAIL, MIL, EDUC, HEALTH, OTHER)

<table>
<thead>
<tr>
<th>16+ YEAR OLD FU MEMBER</th>
<th>5. ALL OTHERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. OFUM IS FU, or FUMI before [CYEAR]</td>
<td>(\rightarrow) GO TO G90BCKPT</td>
</tr>
<tr>
<td>2. OFUM WAS FU or FUMI IN [PYEAR] and became M_O, DIED, or INST after [P2YEAR]</td>
<td></td>
</tr>
<tr>
<td>3. H/W/”W” WAS FU or FUMI IN [PYEAR] and became M_O, DIED, or INST after [P2YEAR]</td>
<td></td>
</tr>
</tbody>
</table>

G73. AQSN OF FU MEMBER
G74 RULE: WHETHER FU MEMBER IS DECEASED (CYFUHU=7)

[FU MEMBER = DECEASED] → GO TO G76
ALL OTHERS
↓

Big Ofum-Work Income

G75. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
Next we would like to know a little about [CYNAMF CYNAML]. [Are you / Is [he / she]] working now, looking for work, retired, a student, keeping house, or what?
• ENTER all that apply
• PROBE: Any others?

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 (G75SPEC. Specify (String 100))

G76. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
[FU MEMBER=DECEASED: Next, we would like to know a little about [CYNAMF CYNAML].] During [PYEAR], how many full-time or part-time jobs did [you / 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. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
[First / Second / Third / Fourth] Job
What kind of work did [you / he / she] usually do? What was [your / his / her] occupation?
• [1st JOB AND G76=2-4: R reported multiple jobs -- ask for the main job here]

String 500

G77A RULE: WHETHER THIS IS FIRST JOB

FIRST JOB | ALL OTHERS → GO TO G78
↓

G77A. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
First Job
What was the official title of [your / his / her] job? (The title that [your / his / her] employer used.)
• [1st JOB AND G76=2-4: R reported multiple jobs -- ask for the main job here]

String 200

G77B. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
First Job
On a typical day, how many minutes was [your / his / her] round trip commute to and from work?
• [1st JOB AND G76=2-4: R reported multiple jobs -- ask for the main job here]
• If R says “travels from home to temporary lodging near worksite”, ENTER [995]
• If R says “it varies”, ENTER [996]
• If R says “doesn’t commute” (e.g. self-employed, works from home), ENTER [997]

1 – 900
995. Temp lodging (VOL)
996. It varies (VOL)
997. No commute (VOL)
G78. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]  
[First / Second / Third / Fourth] Job  
About how much money did [you / he / she] earn from that job last year?  
- [1st JOB AND G76=2-4: R reported multiple jobs -- ask for the main job here]  
- ENTER amount here, then SELECT unit of time on next screen (Hour, Week, Two weeks, Month, Year)  

$1 – 9,999,997.99  
DK/RF  
GO TO G79

↓

G78PER. The amount entered is: [G78] per ___  
- SELECT the unit of time below  
  1. Hour 2. Week 3. Two weeks 4. Month 5. Year  
  6. Year  
  7. Other-specify (G78PERSPEC. Specify. (String 100))

↓

G79. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]  
[First / Second / Third / Fourth] Job  
About how many weeks did [you / he / she] work on that job last year?  
- [1st JOB AND G76=2-4: R reported multiple jobs -- ask for the main job here]  
  1 – 52

↓

G80. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]  
[First / Second / Third / Fourth] Job  
During which months was that?  
- [1st JOB AND G76=2-4: R reported multiple jobs -- ask for the main job here]  
- ENTER all that apply  
- PROBE: Any others?  

↓

G81. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]  
[First / Second / Third / Fourth] Job  
During the weeks that [you / he / she] worked, about how many hours did [you / he / she] usually work per week?  
- [1st JOB AND G76=2-4: R reported multiple jobs -- ask for the main job here]  
- ROUND DOWN for fractions less than ½ (0.5)  
- ROUND UP for fractions ½ (0.5) or more  
  1 – 112

↓

G82 RULE: NUMBER OF JOBS AT G76  
MORE JOBS  
REPEAT G77-G81; MAX=4;  
ALL OTHERS  
THEN GO TO G83

↓

Big Ofum-Transfer Income  
G83. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]  
Did [you / he / she] have any [other] income, such as pensions, welfare, interest, gifts, or anything else, last year?  
  1. Yes 5. No  
GO TO G88MO

↓
G84. What was that from?

- ENTER all that apply
- PROBE: Any others?
- SSI (Supplemental Security Income) is not Social Security, nor is it Social Security Disability Insurance (SSDI), although the Social Security Administration administers the program and a person can receive both. See F1-Help for more information.

<table>
<thead>
<tr>
<th>1. Interest</th>
<th>2. TANF/STATEPROG/ADC/AFDC</th>
<th>3. SSI</th>
<th>4. Welfare</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASK G84A-G84AA</td>
<td>ASK G84B-G84BBB</td>
<td>ASK G84C1-G84C5</td>
<td>ASK G84D-G84DD</td>
</tr>
<tr>
<td>ASK G84E-G84E4</td>
<td>ASK G84F-G84FF</td>
<td>ASK G84G-G84GG</td>
<td>ASK G84H-G84HH</td>
</tr>
<tr>
<td>ASK G84J-G84JJ</td>
<td>ASK G84K-G84KK</td>
<td>ASK G84L-G84LL</td>
<td>ASK G84M-G84M3</td>
</tr>
</tbody>
</table>

G84=Interest

G84A. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
How much was from interest?

- ENTER amount here, then SELECT unit of time on next screen (Month, Year)

\[ $1 – 999,997 \text{ DK/RF} \rightarrow \text{GO TO G84AA} \]

↓

G84APER. The amount entered is: [G84A] per __

- SELECT the unit of time below

5. Month | 6. Year | 7. Other-specify (G84APERSPEC. Specify. (String 100))

G84AA. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
During which months of [PYEAR] did [you / he / she] get this income?

- ENTER all that apply
- PROBE: Any others?

|------------|-------------|----------|----------|--------|--------|

G84=TANF

G84B. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
How much was from TANF (Temporary Assistance for Needy Families)[PYSTATERESIDEC<>FC/DK/RF: or [STATEPROG]] formerly called ADC or AFDC?

- ENTER amount here, then SELECT unit of time on next screen (Two weeks, Month, Year)

\[ $1 – 999,997 \text{ DK/RF} \rightarrow \text{GO TO G84BB} \]

↓

G84BPER. The amount entered is: [G84B] per __

- SELECT the unit of time below

4. Two weeks | 5. Month | 6. Year | 7. Other-specify (G84BAPERSPEC. Specify. (String 100))
G84BB. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
During which months of [PYEAR] did [you / he / she] get this income?
• ENTER all that apply
• PROBE: Any others?
1. January 
2. February 
3. March 
4. April 
5. May 
6. June 
7. July 
8. August 
9. September 
10. October 
11. November 
12. December 
13. All 

G84BBB. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
Who in the family was covered by this?
• ENTER all that apply
• PROBE: Any others?
1 -- 24. [CYNAMF CYNAML, CYAQRTH, CYFUHU] AQSN list of FU Members w/FUHU=FU, FUMispPYEAR, MOePYEAR, DECDePYEAR, MILT, EDUC, HLTH, OTHR

G84=SSI

G84C1. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
Did [you / he / she] receive the SSI for [yourself / himself / herself], or for someone else?
• SSI (Supplemental Security Income) is not Social Security, nor is it Social Security Disability Insurance (SSDI), although the Social Security Administration administers the program and a person can receive both. See F1-Help for more information.
1. Self → GO TO G84C4
2. Someone else
3. Both → DK/RF GO TO G84C4

G84C2. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
Let’s talk about the other person’s Supplemental Security when we talk about their income.
• ENTER [1] to continue
1. Continue

G84C3 RULE: WHETHER SSI FOR SOMEONE ELSE (G84C1=2) OR BOTH (G84C1=3)
SOMEONE ELSE → GO TO NEXT G84 ITEM
BOTH

G84C4. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
How much was [G84C1=SELF: it / ALL OTHERS: the Supplemental Security Income [you / he / she] received for [yourself / himself / herself]]?
• ENTER amount here, then SELECT unit of time on next screen (Month, Year)
$ 1 – 999,997 → DK/RF GO TO G84C5

G84C4PER. The amount entered is: [G84C4] per __
• SELECT the unit of time below
5. Month
6. Year
7. Other-specified (G84C4PERSPEC. Specify. (String 100))
G84C5. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
During which months of [PYEAR] did [you / he / she] get this income?
- ENTER all that apply
- PROBE: Any others?

G84=Welfare

G84D. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
How much was from welfare?
- ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)
  $ 1 – 999,997  DK/RF ➔ GO TO G84DD
  ↓
  G84DPER. The amount entered is: [G84D] per __
  - SELECT the unit of time below
  3. Week  4. Two weeks  5. Month  6. Year
  7. Other-specify (G84DPERSPEC. Specify. (String 100))

G84DD. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
During which months of [PYEAR] did [you / he / she] get this income?
- ENTER all that apply
- PROBE: Any others?

G84=Social Security

G84E RULE: WHETHER SOC SEC ALREADY REPORTED FOR THIS OFUM AT G32

SOC SEC REPORTED ➔ GO TO NEXT G84 ITEM  ALL OTHERS
↓

G84E2A. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
What was the Social Security? Was that disability, retirement, survivor’s benefits or what?
- ENTER all that apply
- PROBE: Any others?
  6. Dependent of retired recipient  7. Other-specify (G84E2ASPEC. Specify. (String 100))

G84E3. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
How much was the total amount from Social Security? [2+ SOCSEC INCOMES: Please include all amounts from all types of Social Security [you / he / she] received in [PYEAR].]
- ENTER amount here, then SELECT unit of time on next screen (Month, Year)
  $ 1 – 999,997  DK/RF ➔ GO TO G84E4
  ↓
G84E3PER. The amount entered is: [G84E3] per __
- SELECT the unit of time below
  5. Month  6. Year  7. Other-specify (G84E3PERSPEC. Specify. (String 100))

G84E4. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
During which months of [PYEAR] did [you / he / she] get this income? [2+ SOCSEC INCOMES: (This includes all types of Social Security [you / he / she] received in [PYEAR].)]
- ENTER all that apply
- PROBE: Any others?

G84=Veterans benefits
G84F. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
How much was from veterans benefits?
- ENTER amount here, then SELECT unit of time on next screen (Month, Year)
- If needed: This includes all types of VA (Veteran’s Administration) income [you / he / she] received in [P2YEAR].

$ 1 – 999,997 DK/RF → GO TO G84FF
↓
G84FPER. The amount entered is: [G84F] per __
- SELECT the unit of time below
  5. Month  6. Year  7. Other-specify (G84FPERSPEC. Specify. (String 100))

G84FF. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
During which months of [PYEAR] did [you / he / she] get this income?
- ENTER all that apply
- PROBE: Any others?
- If needed: This includes all types of VA (Veteran’s Administration) income [you / he / she] received in [P2YEAR].


G84=Pensions, annuities
G84G. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
How much was from pensions or annuities?
- ENTER amount here, then SELECT unit of time on next screen (Month, Year)

$ 1 – 999,997 DK/RF → GO TO G84GG
↓
G84GPER. The amount entered is: [G84G] per __
- SELECT the unit of time below
  5. Month  6. Year  7. Other-specify (G84GPPERSPEC. Specify. (String 100))
G84GG. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
During which months of [PYEAR] did [you / he / she] get this income?
• ENTER all that apply
• PROBE: Any others?

G84=Unemployment comp

G84H. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
How much was from unemployment compensation?
• ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)
  $ 1 – 999,997  DK/RF → GO TO G84HH
↓
G84HPER. The amount entered is: [G84H] per __
• SELECT the unit of time below
  3. Week  4. Two weeks  5. Month  6. Year
  7. Other-specify (G84HPERSPEC. Specify. (String 100))

G84HH. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
During which months of [PYEAR] did [you / he / she] get this income?
• ENTER all that apply
• PROBE: Any others?

G84=Worker’s comp

G84J. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
How much was from worker’s compensation?
• ENTER amount here, then SELECT unit of time on next screen (Month, Year)
  $ 1 – 999,997  DK/RF → GO TO G84JJ
↓
G84JPER. The amount entered is: [G84J] per __
• SELECT the unit of time below
  5. Month  6. Year  7. Other-specify (G84JPERSPEC. Specify. (String 100))

G84JJ. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
During which months of [PYEAR] did [you / he / she] get this income?
• ENTER all that apply
• PROBE: Any others?
G84=Child support

G84K. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
How much was from child support?

- ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)

$ \text{1} – 999,997 \text{DK/RF} \rightarrow \text{GO TO G84KK}

↓

G84KPER. The amount entered is: [G84K] per __

- SELECT the unit of time below

| 3. Week | 4. Two weeks | 5. Month | 6. Year |

7. Other-sayify (G84KPERSPEC. Specify. [String(100)])

G84KK. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
During which months of [PYEAR] did [you / he / she] get this income?

- ENTER all that apply
- PROBE: Any others?


G84=Help from relatives

G84L. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
How much was received from relatives?

- This must be from non-FU members
- ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)

$ \text{1} – 999,997 \text{DK/RF} \rightarrow \text{GO TO G84LL}

↓

G84LPER. The amount entered is: [G84L] per __

- SELECT the unit of time below

| 3. Week | 4. Two weeks | 5. Month | 6. Year |

7. Other-sayify (G84LPERSPEC. Specify. [String(100)])

G84LL. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
During which months of [PYEAR] did [you / he / she] get this income?

- ENTER all that apply
- PROBE: Any others?

G84=Other

G84M. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
What was that other income from?
- IF R mentions income from a job, PROBE for these details:
  - Occ/Ind: What was [your / his / her] occupation? What sort of work did [you / he / she] do?
  - Start/End: What month and year did [you / he / she] start that job? End that job?
  - Job Title / Commute: What was [your / his / her] official job title? On a typical day, how many minutes was [your / his / her] round trip commute to and from work?
  - Work Hours: How many weeks did [you / he / she] work at that job in [PYEAR]? On average, how many hours per week did [you / he / she] work in [PYEAR]?

Open end

G84MM. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
How much was from anything else?
- ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)

$ 1 – 999,997 ] DK/RF → GO TO G84M3

↓

G84MMPER. The amount entered is: [G84MM] per __
- SELECT the unit of time below
  - 3. Week  4. Two weeks  5. Month  6. Year
  - 7. Other-specify (G84MMPERSPEC. Specify. (String 100))

G84M3. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
During which months of [PYEAR] did [you / he / she] get this income?
- ENTER all that apply
- PROBE: Any others?

G88MO. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
When did [you / he / she] last attend school?
- SELECT Month and [Enter] to go to next screen for year
- IF NECESSARY: What would be your best estimate?
- ENTER [95] if still in school

  - 95. Still in school  DK/RF

↓

SET G88YR=9995; GO TO G90A1

↓

G88YR. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
- The month entered is: [G88MO]
- ENTER the year below

9995  Still in school
9996  [P2YEAR]-[CYEAR], DK which year
9997  Before [P2YEAR], DK exact year

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

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0. None</td>
<td>1. First grade</td>
</tr>
<tr>
<td></td>
<td>2. Second grade</td>
</tr>
<tr>
<td></td>
<td>3. Third grade</td>
</tr>
<tr>
<td></td>
<td>4. Fourth grade</td>
</tr>
<tr>
<td></td>
<td>5. Fifth grade</td>
</tr>
<tr>
<td></td>
<td>6. Sixth grade</td>
</tr>
<tr>
<td></td>
<td>7. Seventh grade</td>
</tr>
<tr>
<td></td>
<td>8. Eighth grade</td>
</tr>
<tr>
<td></td>
<td>9. Ninth grade</td>
</tr>
<tr>
<td></td>
<td>10. Tenth grade</td>
</tr>
<tr>
<td></td>
<td>11. Eleventh grade</td>
</tr>
<tr>
<td></td>
<td>12. Twelfth grade, &quot;High School&quot;, GED</td>
</tr>
<tr>
<td></td>
<td>13. Less than one year college</td>
</tr>
<tr>
<td></td>
<td>14. One year college</td>
</tr>
<tr>
<td></td>
<td>15. Two years college</td>
</tr>
<tr>
<td></td>
<td>16. Three years college</td>
</tr>
<tr>
<td></td>
<td>17. Four years college</td>
</tr>
<tr>
<td></td>
<td>18. Five years or more college</td>
</tr>
<tr>
<td></td>
<td>19. College graduate</td>
</tr>
<tr>
<td></td>
<td>20. Post-graduate work</td>
</tr>
</tbody>
</table>

Did [you / he / she] graduate from high school, get a GED, or neither?

1. Graduated from high school  
2. Got a GED  
3. Neither

Did [you / she / he] receive a college degree? If Yes: What is the highest college degree [you / she / he] [have / has] received?

- ENTER [0] for “No did not receive a college degree”

0. Did not receive degree  
1. Associate’s degree/AA  
2. Bachelor’s degree/BA/BS  
3. Master’s degree/MA/MS/MBA  
4. Doctorate/PhD  
5. LLB, JD (Law degrees)  
6. MD, DDS, DVM, DO (Medical degrees)  
8. Honorary degree  
97. Other-specify (G90A3SPEC. Specify (String 100))

What is the name of the college or university from which [you / he / she] received [your / his / her] bachelor’s degree?

String 100

Where is it located?

[990A4]  
- IF needed: In what city and state is the college or university from which [you / he / she] received [your / his / her] bachelor’s degree?

String 25
G90A5STATE. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
(In what state is the college or university from which [you / she / he] received [your / her / his] bachelor's degree?)

[G90A4]

[G90ASCITY]
- Start typing the name of the State to bring up the look-up list
- IF foreign country, ENTER [FOR] to select “Foreign Country”

String 30; State Lookup List. State → GO TO G90A6MO Foreign Country DK/RF → GO TO G90A6MO

↓

G90A5COUNTRY. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
(In what country is the college or university from which [you / he / she] received [your / his / her] bachelor's degree?)

[G90A4]

[G90ASCITY] [G90A5STATE]
- Start typing the name of the Foreign Country to bring up the look-up list

String 25; Country Lookup List

G90A6MO. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
In what month and year did [you / he / she] receive [your / his / her] bachelor's degree?
- SELECT Month and [Enter] to go to next screen for year
- IF necessary: What would be your best estimate?


G90A6YR. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
(In what year did [you / he / she] receive [your / his / her] bachelor's degree?)
- The month entered is: [G90A6MO]
- ENTER the year below

1901-[CYEAR]

G90A7. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
What was [your / her / his] major (at the college or university from which [you / he / she] received [your / his / her] bachelor's degree)?
- Probe for details and dual majors

String 100

G90A8. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]
- [G90A3=MASTERS, DOCTORATE, LAW, MEDICAL, HONORARY: And, what / ALL OTHERS: What] is the name of the college or university from which [you / he / she] received [your / his / her] highest degree?

String 100
G90A9CITY. [CYNAMF CYNAML, CYAQRTH, AGEIWDAT]
Where is it located?
[G90A8]
- IF needed: In what city and state is the college or university from which [you / he / she] received [your / his / her] highest degree??

String 25

G90A9STATE. [CYNAMF CYNAML, CYAQRTH, AGEIWDAT]
(In what state is the college or university from which [you / she / he] received [your / her / his] highest degree?)
[G90A8]
[G90A9CITY]
- Start typing the name of the State to bring up the look-up list
- IF foreign country, ENTER [FOR] to select “Foreign Country”

String 30; State Lookup List.

G90A9COUNTRY. [CYNAMF CYNAML, CYAQRTH, AGEIWDAT]
(In what country is the college or university from which [you / he / she] received [your / his / her] highest degree?)
[G90A8]
[G90A9CITY] [G90A9STATE]
- Start typing the name of the Foreign Country to bring up the look-up list

String 25; Country Lookup List

G90A10MO. [CYNAMF CYNAML, CYAQRTH, AGEIWDAT]
In what month and year did [you / he / she] receive that degree ([your / his / her] highest degree)?
- SELECT Month and [Enter] to go to next screen for year
- IF necessary: What would be your best estimate?

|------------|-------------|----------|----------|--------|--------|

G90A10YR. [CYNAMF CYNAML, CYAQRTH, AGEIWDAT]
(In what year did [you / he / she] receive [your / his / her] highest degree?)
- The month entered is: [G90A10MO]
- ENTER the year below

1901-[CYEAR]

G90A11. [CYNAMF CYNAML, CYAQRTH, AGEIWDAT]
What was [your / her / his] [G90A3=BACHELORS: major / ALL OTHERS: area of study] (at the college or university from which [you / he / she] received [your / his / her] highest degree)?
- Probe for details and dual majors

String 100
G90A12CKPT. WHETHER THIS OFUM IS STILL IN SCHOOL (G88MO=95 OR G88YR=9995) OR IS DECEASED (CYFUHU=7)

- [ ] 1. STILL IN SCHOOL
- [ ] 2. FU MEMBER IS DECEASED
- [ ] All OTHERS

GO TO G90A13  GO TO G90A RULE  ↓

G90A12. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]

[Are you / Is [he / she]] attending or enrolled in regular school? (Regular school includes high school and schooling that leads to a college or professional school degree.)

- [ ] 1. Yes  [ ] 5. No  → GO TO G90A RULE  ↓

G90A13. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]

[STILL IN SCHOOL: Earlier you said [you / CYNAMF] [are / is] still in school.]

What grade or year [are you / is [he / she]] attending?

- [ ] 1. First grade  [ ] 2. Second grade  [ ] 3. Third grade  [ ] 4. Fourth  [ ] 5. Fifth grade
- [ ] 14. 2nd year college (sophomore)  [ ] 15. 3rd year college (junior)  [ ] 16. 4th year college (senior)
- [ ] 17. 5th or higher year of college  [ ] 18. 1st year graduate school  [ ] 19. 2nd year graduate school
- [ ] 20. 3rd year or higher graduate school  [ ] 21. College, no year reported

G90A RULE: WHETHER THERE ARE MORE ELIGIBLE OLDER OFUMS

- [ ] MORE ELIGIBLE OFUMs  → REPEAT G75- G90A13; MAX=24;
- [ ] ALL OTHERS

THEN GO TO G90BCKPT  ↓

Little OFUM Series

G90BCKPT. CAI CHECKPOINT: WHETHER THERE ARE ELIGIBLE <16 YEAR OLD FU MEMBERS...

1. OFUM NOW IN FU (FUP1YEAR[I].AGEIWDATE>15 OR COVERSCREEN.AGEGE16[I]=YES & FUP1YEAR[I].AQRTH.ORD>222 & FUP1YEAR[I].FUHU=FU, FUMI) OR
2. LAST WAVE OFUM NOT IN FU (FUP1YEAR[I].AGEIWDATE>15 OR COVERSCREEN.AGEGE16[I]=YES & FUP1YEAR[I].AQRTH.ORD>222 & FUP1YEAR[I].FUHU=M_O, JAIL, MIL, EDUC, HEALTH, OTHER)

- [ ] 1. OFUM IS FU, or FUMI before [CYEAR]
- [ ] 2. OFUM WAS FU or FUMI in [PYEAR] and became M_O, DIED, INST after [P2YEAR]
- [ ] 5. ALL OTHERS

GO TO G99  ↓
Little Ofum-Income

G90D. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]

[First Iteration: Now the younger member(s) of [R=FU Member: your / R=Proxy: the] family.]
Did [CYNAMF CYNAML] have any income in [PYEAR]?
1. Yes 5. No → GO TO G98 RULE

↓

G92. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]

Now, we would like to ask about [CYNAMF CYNAML’s] income. What was that from?
- ENTER all that apply
- PROBE: Any others?
- SSI (Supplemental Security Income) is **not** Social Security, nor is it Social Security Disability Insurance (SSDI), although the Social Security Administration administers the program and a person can receive both. See F1-Help for more information.

1. Work
2. Interest
3. SSI
4. Welfare
5. Social Security
6. Other-specify

ASK G94A-G94AA, G95-G97
ASK G94B-G94BB ASK G94C-G94CC
ASK G94D-G94DD ASK G94E-G94E4 ASK G94F-G94F3

G92=Work

G94A. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]

How much was from work?
- ENTER amount here, then SELECT unit of time on next screen (Hour, Week, Two weeks, Month, Year)

$ 1.0 – 9,999,997.99 DK/RF → GO TO G94AA

↓

G94APER. The amount entered is: [G94A] per __
- SELECT the unit of time below

7. Other-specify (G94APERSPEC. Specify. (String 100))

G94AA. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]

During which months of [PYEAR] did [he / she] get this income?
- ENTER all that apply
- PROBE: Any others?


G95. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]

What was [his / her] occupation? What kind of work did [he / she] do?

String 500

G96. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]

About how many weeks did [he / she] work on that job last year?

1 – 52
G97. **[CYNAMF CYNAML, CYAQRTH, AGEIWDATE]**
During the weeks that [he / she] worked, about how many hours did [he / she] usually work per week?
- ROUND DOWN for fractions less than \( \frac{1}{2} \) (0.5)
- ROUND UP for fractions \( \frac{1}{2} \) (0.5) or more

<table>
<thead>
<tr>
<th>1</th>
<th>11</th>
<th>2</th>
</tr>
</thead>
</table>

G92=Interest

G94B. **[CYNAMF CYNAML, CYAQRTH, AGEIWDATE]**
How much was from interest?
- ENTER amount here, then SELECT unit of time on next screen (Month, Year)

<table>
<thead>
<tr>
<th>$1 – 999,997</th>
<th>DK/RF</th>
<th>GO TO G94BB</th>
</tr>
</thead>
</table>

↓

G94BPER. The amount entered is: [G94B] per __
- SELECT the unit of time below

<table>
<thead>
<tr>
<th>5. Month</th>
<th>6. Year</th>
<th>7. Other-specify (G94BPERSPEC. Specify. (String 100))</th>
</tr>
</thead>
</table>

G94BB. **[CYNAMF CYNAML, CYAQRTH, AGEIWDATE]**
During which months of [PYEAR] did [he / she] get this income?
- ENTER all that apply
- PROBE: Any others?

|---|---|---|---|---|---|

G92=SSI

G94C. **[CYNAMF CYNAML, CYAQRTH, AGEIWDATE]**
How much was from SSI?
- ENTER amount here, then SELECT unit of time on next screen (Month, Year)
- SSI (Supplemental Security Income) is **not** Social Security, nor is it Social Security Disability Insurance (SSDI), although the Social Security Administration administers the program and a person can receive both. See F1-Help for more information.

<table>
<thead>
<tr>
<th>$1 – 999,997</th>
<th>DK/RF</th>
<th>GO TO G94CC</th>
</tr>
</thead>
</table>

↓

G94CPER. The amount entered is: [G94C] per __
- SELECT the unit of time below

<table>
<thead>
<tr>
<th>5. Month</th>
<th>6. Year</th>
<th>7. Other-specify (G94CPERSPEC. Specify. (String 100))</th>
</tr>
</thead>
</table>

G94CC. **[CYNAMF CYNAML, CYAQRTH, AGEIWDATE]**
During which months of [PYEAR] did [he / she] get this income?
- ENTER all that apply
- PROBE: Any others?

|---|---|---|---|---|---|
**G92=Welfare**

**G94D. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]**

How much was from welfare?

- ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)

  $ 1 – 999,997  \text{DK/RF} \rightarrow \text{GO TO G94DD}

↓

**G94DPER. The amount entered is: [G94D] per __**

- SELECT the unit of time below

  - 3. Week
  - 4. Two weeks
  - 5. Month
  - 6. Year
  - 7. Other-specify (G94DPERSPEC. Specify. (String 100))

**G94DD. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]**

During which months of [PYEAR] did [he / she] get this income?

- ENTER all that apply
- PROBE: Any others?

  1. January
  2. February
  3. March
  4. April
  5. May
  6. June
  7. July
  8. August
  9. September
  10. October
  11. November
  12. December
  13. All

**G92=Social Security**

**G94E RULE: WHETHER SOC SEC ALREADY REPORTED FOR THIS OFUM AT G32**

  SOC SEC REPORTED \rightarrow \text{GO TO NEXT G94 ITEM; ALL OTHERS}
  
  THEN GO TO G98 RULE

↓

**G94E2A. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]**

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

- ENTER all that apply
- PROBE: Any others?

  3. Survivors benefits
  5. Dependent of disabled recipient
  6. Dependent of retired recipient
  7. Other-specify (G94E2ASPEC. Specify. (String 100))

**G94E3. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]**

How much was the total amount from Social Security? [2+ SOCSEC INCOMES: Please include all amounts from all types of Social Security [you / he / she] received in [PYEAR].]

- ENTER amount here, then SELECT unit of time on next screen (Month, Year)

  $ 1 – 999,997  \text{DK/RF} \rightarrow \text{GO TO G94E4}

↓

**G94E3PER. The amount entered is: [G94E3] per __**

- SELECT the unit of time below

  - 5. Month
  - 6. Year
  - 7. Other-specify (G94E3PERSPEC. Specify. (String 100))
G94E4. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]

During which months of [PYEAR] did [you / he / she] get this income? [2+ SOCSEC INCOMES: (This includes all types of Social Security [you / he / she] received in [PYEAR].)]

- ENTER all that apply
- PROBE: Any others?


G92=Other

G94F. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]

What was that other income from?

- DO NOT include gifts, allowances, or other money from other FU members
- IF R mentions income from a job, PROBE for these details:
  - Occ/Ind: What was [his / her] occupation? What sort of work did [he / she] do?
  - Start/End: What month and year did he / she start that job? End that job?
  - Work Hours: How many weeks did [he / she] work at that job in [PYEAR]? On average, how many hours per week did [he / she] work in [PYEAR]?

Open end

G94F2. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]

How much was it?

- ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)

$ 1 – 999,997  DK/RF → GO TO G94F3

↓

G94F2PER. The amount entered is: [G94F2] per __

- SELECT the unit of time below

3. Week  4. Two weeks  5. Month  6. Year  7. Other-specify (G94F2PERSPEC. Specify, (String 100))

G94F3. [CYNAMF CYNAML, CYAQRTH, AGEIWDATE]

During which months of [PYEAR] did [he / she] get this income?

- ENTER all that apply
- PROBE: Any others?


G98 RULE: WHETHER THERE ARE MORE ELIGIBLE YOUNGER OFUMS AT G90C

MORE ELIGIBLE OFUMs → REPEAT G92-G94F3; MAX=24; ALL OTHERS
THEN GO TO G99

G99. Did [you / HEAD] [PYEAR FU COUNT>1: or anyone else in [your / his / her] family living there] get any other money in [PYEAR] - 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?

$ 1 – 9,999,997
G101. How much of that was an inheritance?

$0 – 9,999,997

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

1. Yes
5. No or did / will not file → GO TO G103

↓

G102A. How much was [your / his / her] itemized deduction for charitable contributions?

$0 – 999,997

G102B. How much was [your / his / her] itemized deduction for medical expenses?

• IF necessary: Is that the amount of the deduction or is that the total medical expenses? What was the amount of the deduction?

$0 – 999,997

G103. In [PYEAR], did [you / HEAD] [PYEAR FU COUNT>1: or anyone else in [your / his / her] 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 R

↓

G104. How many people was that?

1 – 9

G105. Who was the [first / next] person? What is [FIRSTNAME’s] relationship to [you / HEAD]?

G105. FIRSTNAME. String 10
G105. LASTNAME. String 15

G105RTHLAB. What is [G105FIRSTNAME G105LASTNAME’s] relationship to [you / HEAD]?

String 50; RTH Lookup

G106 RULE: WHETHER MORE PERSONS SUPPORTED AT G104

MORE PERSONS SUPPORTED → REPEAT G105; MAX=9; ALL OTHERS THEN GO TO G106

G106. How much money was that altogether in [PYEAR]?

$1 – 9,999,997
G107. Was any of that child support?
1. Yes 5. No → GO TO G109

↓

G108. How much did that child support amount to in [PYEAR]?

$1 – [G106 (9,999,997)]

G109. Was any of the money [you / HEAD] gave in [PYEAR] alimony?
1. Yes 5. No → GO TO G111 RULE

↓

G110. How much did that alimony amount to in [PYEAR]?

$1 – [G106 (9,999,997)]

G111 RULE: NUMBER OF PERSONS SUPPORTED AT G104

<table>
<thead>
<tr>
<th>MORE THAN ONE PERSON SUPPORTED</th>
<th>ONLY ONE PERSON SUPPORTED</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

↓

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 R

↓

G113. How many people is that?

1 – 9

G114. Was that person dependent on [you / HEAD] for more than half of their total support?

1. Yes 5. No

GO TO SECTION R
Section R: Income t-2

RINTRO. Because we interview our families every other year, we often miss important financial information. Now, I will be asking you a few questions about [your / their] income from two years ago, that is [P2YEAR].

1. Continue

R1CKPT. WHETHER HEAD WORKED IN [P2YEAR] (BCWTRP2YEAR=1 FOR ANY JOB); LOOP 1=HEAD, LOOP 2=WIFE/"WIFE" IF THERE IS ONE IN THE FU

1. HEAD WORKED IN [P2YEAR]  5. ALL OTHERS → GO TO R7ACKPT

R2. Earlier you reported that [you / HEAD / WIFE/"WIFE"] [were / was] working in [P2YEAR]. Thinking now about all the work for money that [you / he / she] did during [P2YEAR], including jobs, businesses, self-employment and part-time work, about how much did [you / he / she] earn altogether in [P2YEAR]? Please include any income from bonuses, overtime, tips or commissions.

• IF necessary: Please give me your best estimate
• ENTER amount here, then SELECT unit of time on next screen (Hour, Week, Two weeks, Month, Year)

1 – 9,999,997.99 DK/RF → GO TO R7ACKPT

↓

R2PER. The amount entered is: [R2] per __

• SELECT the unit of time below


7. Other-specified (R2PERSPEC. Specify. (String 100))

R7ACKPT. CAI CHECKPOINT: WHETHER WIFE/"WIFE" IN FU (CYFUHU=1, 4 & CYAQRTH=202, 222)

1. WIFE/"WIFE" IN FU  5. ALL OTHERS → GO TO R41

↓

R7BCKPT. CAI CHECKPOINT: WHETHER WIFE/"WIFE" WORKED IN [P2YEAR] (DEWTRP2YEAR=1 FOR ANY JOB)

1. WIFE/"WIFE" WORKED IN [P2YEAR] → ASK R2 FOR WIFE/"WIFE"; 5. ALL OTHERS

THEN GO TO R41

↓

R41. At any time during [P2YEAR], even for one month, did [P2YEAR FU COUNT=1: you / ALL OTHERS: anyone in this family] receive any income from TANF (Temporary Assistance for Needy Families) [PYSTATERESIDE<>FC/DK/RF: or [STATEPROG]] 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
R47. (At any time during [P2YEAR], did [R=FU MEMBER: you [CYEAR FU COUNT>1: or anyone else in your family there] / R=PROXY: anyone in the family] receive any income...)
From Supplemental Security Income?
- SSI (Supplemental Security Income) is not Social Security, nor is it Social Security Disability Insurance (SSDI), although the Social Security Administration administers the program and a person can receive both. See F1-Help for more information.

1. Yes 5. No

R51. (At any time during [P2YEAR], did you [R=FU MEMBER: you [CYEAR FU COUNT>1: or anyone else in your family there] / R=PROXY: anyone in the family] receive any income...)
From other welfare?

1. Yes 5. No

- If necessary: Including Retirement, Disability, Survivor’s or Dependent benefits

1. Yes 5. No

R29. (At any time during [P2YEAR], did you [R=FU MEMBER: you [CYEAR FU COUNT>1: or anyone else in your family there] / R=PROXY: anyone in the family] 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

R25. (At any time during [P2YEAR], did you [R=FU MEMBER: you [CYEAR FU COUNT>1: or anyone else in your family there] / R=PROXY: anyone in the family] receive any income...)
From other retirement pay, pensions, or annuities?

1. Yes 5. No

R33. (At any time during [P2YEAR], did you [R=FU MEMBER: you [CYEAR FU COUNT>1: or anyone else in your family there] / R=PROXY: anyone in the family] receive any income...)
From unemployment compensation?

1. Yes 5. No

R37. (At any time during [P2YEAR], did you [R=FU MEMBER: you [CYEAR FU COUNT>1: or anyone else in your family there] / R=PROXY: anyone in the family] receive any income...)
From workers compensation?

1. Yes 5. No

R55. (At any time during [P2YEAR], did you [R=FU MEMBER: you [CYEAR FU COUNT>1: or anyone else in your family there] / R=PROXY: anyone in the family] receive any income...)
From child support, alimony, or separate maintenance?

1. Yes 5. No
Section W: Wealth and Active Savings

W1. The next questions I will be asking are designed to give estimates of the wealth of families in the United States. [R=FU MEMBER: In these questions when I refer to the family, I mean your family living there with you.]
Do [R=FU MEMBER: you [CYEAR FU COUNT>1: or your family living there] / R=PROXY: they] have any real estate [A19=OWNS: other than [your / their] main home,] such as a second home, land (not including farmland), rental real estate, or money owed to [R=FU MEMBER: you / R=PROXY: them] on a land contract?

1. Yes  5. No → GO TO W6

↓
W1A. Does that include a second home?

1. Yes  5. No

W2A. How much is the real estate worth, that is, how much would it sell for?
- If needed: Real estate [A19=OWNS: other than [[R=FU MEMBER: your / R=PROXY: their] main home,] such as a second home, land (not including farmland), rental real estate, or money owed to [R=FU MEMBER: you / R=PROXY: them] on a land contract

$ 0 - 999,999,997 → GO TO W2B  DK/RF

↓
W3A. Would it amount to $50,000 or more?

1. Yes  5. No  DK/RF → GO TO W2B

↓
W4A. $175,000 or more?
W5A. $20,000 or more?

1. Yes  5. No  DK/RF  1. Yes  5. No  DK/RF

↓
W2B. (And) how much debt do [R=FU MEMBER: you / R=PROXY: they] owe on that (real estate)?
- If needed: Real estate [A19=OWNS: other than [[R=FU MEMBER: your / R=PROXY: their] main home,] such as a second home, land (not including farmland), rental real estate, or money owed to [R=FU MEMBER: you / R=PROXY: them] on a land contract

$ 0 - 999,999,997 → GO TO W6  DK/RF

↓
W3B. Would it amount to $50,000 or more?

1. Yes  5. No  DK/RF → GO TO W6

↓
W4B. $175,000 or more?
W5B. $20,000 or more?

1. Yes  5. No  DK/RF  1. Yes  5. No  DK/RF
W6. What about the value of what \([R=FU\ MEMBER: \text{you} \ [CYEAR\ FU\ COUNT>1]: \text{or anyone in your family living there}] / R=PROXY: \text{they}]\) own on wheels? Including \([F47=\text{YES}: \text{personal vehicles you may have already told me about and}]\) any cars, trucks, a motor home, a trailer, or a boat - what are they worth all together, minus anything \([R=FU\ MEMBER: \text{you} / R=PROXY: \text{they}]\) still owe on them?

- Include only vehicles owned by the FU
- DO NOT include vehicles owned by HU or HUCS people

\[\text{\$ -99,999,999 – 999,999,997} \rightarrow \text{GO TO W10} \quad \text{DK/RF}\]

W7. Would they amount to \$10,000 or more?

\[
\begin{array}{cc}
1. \text{Yes} & 5. \text{No} \\
\end{array}
\]

\[\rightarrow \text{GO TO W10} \quad \text{DK/RF}\]

W8. \$25,000 or more?

\[\rightarrow \text{W9. \$2,000 or more?} \quad \text{DK/RF}\]

\[
\begin{array}{cc}
1. \text{Yes} & 5. \text{No} \\
\end{array}
\]

W10. Do \([R=FU\ MEMBER: \text{you} / R=PROXY: \text{they}]\) currently own part or all of a farm or business?

\[
\begin{array}{cc}
1. \text{Yes} & 5. \text{No} \\
\end{array}
\]

\[\rightarrow \text{GO TO W15} \quad \text{DK/RF}\]

W11A. How much is \([R=FU\ MEMBER: \text{your} / R=PROXY: \text{their}]\) part (of the farm or business) worth, that is, how much would it sell for?

\[\text{\$ 0 - 999,999,997} \rightarrow \text{GO TO W11B} \quad \text{DK/RF}\]

W12A. Would it amount to \$50,000 or more?

\[
\begin{array}{cc}
1. \text{Yes} & 5. \text{No} \\
\end{array}
\]

\[\rightarrow \text{GO TO W11B} \quad \text{DK/RF}\]

W13A. \$200,000 or more?

\[\rightarrow \text{W14A. \$10,000 or more?} \quad \text{DK/RF}\]

\[
\begin{array}{cc}
1. \text{Yes} & 5. \text{No} \\
\end{array}
\]

W11B. And how much debt do \([R=FU\ MEMBER: \text{you} / R=PROXY: \text{they}]\) owe on that (farm or business)?

\[\text{\$ 0 - 999,999,997} \rightarrow \text{GO TO W15} \quad \text{DK/RF}\]

W12B. Would it amount to \$50,000 or more?

\[
\begin{array}{cc}
1. \text{Yes} & 5. \text{No} \\
\end{array}
\]

\[\rightarrow \text{GO TO W15} \quad \text{DK/RF}\]

W13B. \$200,000 or more?

\[\rightarrow \text{W14B. \$10,000 or more?} \quad \text{DK/RF}\]

\[
\begin{array}{cc}
1. \text{Yes} & 5. \text{No} \\
\end{array}
\]
W15. (Do \( R=FU \) MEMBER: you \( CYEAR \) FU COUNT>1: or anyone in your family living there) / \( R=PROXY \): they have...

Any shares of stock in publicly held corporations, stock mutual funds, or investment trusts, not including stocks in employer-based pensions or IRA's?

1. Yes 5. No → GO TO W21

W16. If \( R=FU \) MEMBER: you / \( R=PROXY \): they sold all that and paid off anything [you / they] owed on it, how much would \( R=FU \) MEMBER: you / \( R=PROXY \): they have?

\(-99,999,999 – 999,999,997\) → GO TO W20CCKPT

W17. Would it amount to $50,000 or more?

1. Yes 5. No \( DK/RF \) → GO TO W21

W20. $150,000 or more?

1. Yes 5. No \( DK/RF \) → GO TO W21

W20CCKPT. CAI CHECKPOINT: WHETHER DIVIDEND ASSETS REPORTED BUT INCOME WAS NOT

1. W16 > 0 and G25B (HEAD DIVIDENDS)<>YES and G59<>2 (W/"W" DIVIDENDS) 5. ALL OTHERS → GO TO W21

W20E. \([H + "W" IN FU]\): For both [\( R=H \): you and [WIFE/"WIFE"] / \( R=W/"W"\): you and [HEAD] / \( R=OFUM, PROXY\): [HEAD] and [WIFE/"WIFE"])], how much / How much] in dividends did [\( R=H, W/"W"\): you / \( R=OFUM, PROXY\): they] receive altogether in [PYEAR]?

- ENTER amount here, then SELECT unit of time on next screen (Month, Year)

\$ 0 → GO TO W21 \$ 1 – 999,997 \( DK/RF \) → GO TO W20F

W20EPER. The amount entered is: \([W20E]\) per ___

5. Month 6. Year 7. Other-say (W20EPERSPEC. Specify. [String 100])

W20F. During which months of [PYEAR] did \( R=FU \) MEMBER: you / \( R=PROXY \): they get this income?

- ENTER all that apply

PROBE: Any others?

W21. (Do \(R=FU\) MEMBER: you \(\text{CYEAR FU COUNT}>1\): or anyone in your family living there) / \(R=PROXY\): they] 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 interest earning  
3. Split

W22. How much would they be worth?

$ 1 – 9,999,997 → GO TO W27  
DK/RF

↓

W23. Would it amount to $50,000 or more?

1. Yes  
5. No  
DK/RF → GO TO W27

↓

W24. $100,000 or more?  
W25. $15,000 or more?

1. Yes  
5. No  
DK/RF

↓

W26. $250,000 or more?

1. Yes  
5. No  
DK/RF

↓

W27. Not including employer-based pensions or IRAs, do \(R=FU\) MEMBER: you \(\text{CYEAR FU COUNT}>1\): or anyone in your family living there) / \(R=PROXY\): they] have any money in any of the following:

Checking or savings accounts,
Money market funds,
Certificates of deposit,
Government bonds, or
Treasury bills?

1. Yes, one or more  
5. No, none → GO TO W33
W28. If you added up all such accounts for [CYEAR FU COUNT>1]: all of [R=FU MEMBER: your / R=PROXY: the] family living there, about how much would they amount to altogether right now?

\[ \$ 1 – 9,999,997 \rightarrow \text{GO TO W31CKPT} \quad \text{DK/RF} \]

W29. Would they amount to $5,000 or more?

1. Yes \quad 5. No \quad \text{DK/RF} \rightarrow \text{GO TO W33}

W30. $10,000 or more?

W32. $1,000 or more?

W31. $50,000 or more?

1. Yes \quad 5. No \quad \text{DK/RF}

W31CKPT. CAI CHECKPOINT: WHETHER INTEREST ASSETS REPORTED BUT INTEREST INCOME WAS NOT

1. W28 > 0 and G25C (HEAD INTEREST)<->YES and G59<>3 (W"W" INTEREST) \quad 5. ALL OTHERS \rightarrow \text{GO TO W33}

- ENTER amount here, then SELECT unit of time on next screen (Month, Year)

\[ \$ 0 \rightarrow \text{GO TO W33} \quad \$ 1 – 999,997 \quad \text{DK/RF} \rightarrow \text{GO TO W31F} \]

W31EPER. The amount entered is: [W31E] per ___

- SELECT the unit of time below

5. Month \quad 6. Year \quad 7. Other-specify (W31EPERSPEC. Specify. (String 100))

W31F. During which months of [PYEAR] did [R=FU MEMBER: you / R=PROXY: they] get this income?

- ENTER all that apply
- PROBE: Any others?

1. January \quad 2. February \quad 3. March \quad 4. April \quad 5. May \quad 6. June

W33. (Do \([R=FU\ \text{MEMBER}: \ \text{you}[\text{CYEAR}\ \text{FU COUNT}>1]: \ \text{or anyone in your family living there}]/\ R=\text{PROXY}: \ \text{they}][\text{have}])

Any other savings or assets, such as 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 W38A

↓

W34. If \([R=FU\ \text{MEMBER}: \ \text{you}/\ R=\text{PROXY}: \ \text{they}][\text{sold that and paid off any debts on it, how much would} [R=FU\ \text{MEMBER}: \ \text{you}/\ R=\text{PROXY}: \ \text{they}][\text{have}])?

\[-99,999,999 – 999,999,997\] → GO TO W38A DK/RF

W35. Would it amount to $10,000 or more?

1. Yes 5. No DK/RF → GO TO W38A

↓

W36. $25,000 or more? W37. $2,000 or more?

1. Yes 5. No DK/RF 1. Yes 5. No DK/RF

↓

↓

Credit Card Debt

W38A. Aside from the debts that we have already talked about, \([A23=YES\ \text{MTGE}: \ \text{like any mortgage on} \ [R=FU\ \text{MEMBER}: \ \text{your}/\ R=\text{PROXY}: \ \text{their}][\text{main home} [F65/F67=YES\ \text{VEH LOAN}>0]: \ \text{[or] / like} \ [\text{vehicle loans},][\text{do} [R=FU\ \text{MEMBER}: \ \text{you}][\text{CYEAR}\ \text{FU COUNT}>1]: \ \text{or anyone in your family living there}]/\ R=\text{PROXY}: \ \text{they}][\text{currently have any credit card or store card debt}][\text{?}]

1. Yes 5. No → GO TO W38B

↓

W39A. If you added up all credit card and store card debts for \([\text{CYEAR}\ \text{FU COUNT}>1]: \ \text{all of} [R=FU\ \text{MEMBER}: \ \text{your}/\ R=\text{PROXY}: \ \text{the}][\text{family living there}], \text{about how much would they amount to right now? Please do not count any new debt that will be paid off this month.}

- INCLUDE unpaid balance(s) only, or credit card and store card debts that are outstanding

\[1 – 9,999,997\] → GO TO W38B DK/RF

W40A. Would they amount to $5,000 or more?

1. Yes 5. No DK/RF → GO TO W38B

↓

W41A. (Would they amount to) W42A. (Would they amount to)

$10,000 or more? $1,000 or more?

1. Yes 5. No DK/RF 1. Yes 5. No DK/RF

↓

GO TO W38B

↓

W43A. (Would they amount to)

$15,000 or more?

1. Yes 5. No DK/RF
**Student Loans, Medical Bills, Legal Bills, Loans From Relatives Debt**

W38B. Do \([R=FU MEMBER: you [CYEAR FU COUNT\(>1\): or anyone in your family living there] / R=PROXY: they] currently have any other debts such as student loans, medical or legal bills, or loans from relatives?

- ENTER all that apply
- PROBE: Any others?

| 1. Student loans |
| 2. Medical bills |
| 3. Legal bills |
| 4. Loans from relatives |

ASK W39B1-W43B1  
ASK W39B2-W43B2  
ASK W39B3-W43B3  
ASK W39B4-W43B4

5. No  
7. Other-specify

GO TO W43  
ASK W39B7-W43B7

W38B=Student Loans

W39B1. If you added up all student loans \([CYEAR FU COUNT\(>1\): for all of \(R=FU MEMBER: your / R=PROXY: the] family living there], about how much would they amount to right now?

- INCLUDE unpaid balance(s), or student loans that are outstanding

$1–9,999,997 → GO TO NEXT ITEM/W43

W40B1. Would they amount to $25,000 or more?

| 1. Yes |
| 5. No [DK/RF] → GO TO NEXT ITEM/W43 |

W41B1. (Would they amount to) $50,000 or more?

| 1. Yes |
| 5. No [DK/RF] → GO TO NEXT ITEM/W43 |

W42B1. (Would they amount to) $10,000 or more?

| 1. Yes |
| 5. No [DK/RF] |

GO TO NEXT ITEM/W43

W43B1. (Would they amount to) $75,000 or more?

| 1. Yes |
| 5. No [DK/RF] |

GO TO NEXT ITEM/W43
W38B= Medical Bills
W39B. [W38B=STUDENT LOANS: How about medical bills (how much would they amount to right now) / ALL OTHERS: If you added up all medical bills [CYEAR FU COUNT>1: for all of [R=FU MEMBER: your / R=PROXY: the] family living there], about how much would they amount to right now]?
   • INCLUDE unpaid balance(s), or medical bills that are outstanding
   $1 – 9,999,997 → GO TO NEXT ITEM/W43

W40B2. Would they amount to $3,000 or more?
   1. Yes  5. No  DK/RF → GO TO NEXT ITEM/W43
   ↓
W41B2. (Would they amount to)  W42B2. (Would they amount to)
   $10,000 or more?  $1,000 or more?
   1. Yes  5. No  DK/RF  1. Yes  5. No  DK/RF
   ↓  GO TO NEXT ITEM/W43  GO TO NEXT ITEM/W43

W43B2. (Would they amount to)
   $25,000 or more?
   1. Yes  5. No  DK/RF
   GO TO NEXT ITEM/W43

W38B= Legal Bills
W39B3. [W38B=STUDENT LOANS, MEDICAL BILLS: How about legal bills (how much would they amount to right now) / ALL OTHERS: If you added up all legal bills [CYEAR FU COUNT>1: for all of [R=FU MEMBER: your / R=PROXY: the] family living there], about how much would they amount to right now]?
   • INCLUDE unpaid balance(s), or legal bills that are outstanding
   $1 – 9,999,997 → GO TO NEXT ITEM/W43

W40B3. Would they amount to $3,000 or more?
   1. Yes  5. No  DK/RF → GO TO NEXT ITEM/W43
   ↓
W41B3. (Would they amount to)  W42B3. (Would they amount to)
   $8,000 or more?  $1,000 or more?
   1. Yes  5. No  DK/RF  1. Yes  5. No  DK/RF
   ↓  GO TO NEXT ITEM/W43  GO TO NEXT ITEM/W43

W43B3. (Would they amount to)
   $20,000 or more?
   1. Yes  5. No  DK/RF
   GO TO NEXT ITEM/W43
W38B= Loans From Relatives

W39B4. **[W38B=STUDENT LOANS, MEDICAL BILLS, LEGAL BILLS]**: How about loans from relatives (how much would they amount to right now) / **ALL OTHERS**: If you added up all loans from relatives *[CYEAR FU COUNT]>1*: for all of *[R=FU MEMBER]: your / R=PROXY: the] family living there, about how much would they amount to right now?

- **INCLUDE unpaid balance(s), or loans from relatives that are outstanding**

| $1 – 9,999,997 | GO TO NEXT ITEM/W43 | DK/RF |

W40B4. Would they amount to $4,000 or more?

| 1. Yes | 5. No | DK/RF | GO TO NEXT ITEM/W43 |

W41B4. (Would they amount to)

<table>
<thead>
<tr>
<th>$10,000 or more?</th>
<th>$1,000 or more?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Yes</td>
<td>5. No</td>
</tr>
</tbody>
</table>

W42B4. (Would they amount to)

<table>
<thead>
<tr>
<th>$20,000 or more?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Yes</td>
</tr>
</tbody>
</table>

W38B= Other

W39B7A. What were those other debts?

- **Specify**

| String 200 |

W39B7. If you added up all other debts *[CYEAR FU COUNT]>1*: for all of *[R=FU MEMBER]: your / R=PROXY: the] family living there, about how much would they amount to right now?

- **INCLUDE unpaid balance(s), or other debts that are outstanding**

| $1 – 9,999,997 | GO TO NEXT ITEM/W43 | DK/RF |

W40B7. Would they amount to $4,000 or more?

| 1. Yes | 5. No | DK/RF | GO TO NEXT ITEM/W43 |

W41B7. (Would they amount to)

<table>
<thead>
<tr>
<th>$10,000 or more?</th>
<th>$1,000 or more?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Yes</td>
<td>5. No</td>
</tr>
</tbody>
</table>

W42B7. (Would they amount to)

<table>
<thead>
<tr>
<th>$20,000 or more?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Yes</td>
</tr>
</tbody>
</table>

GO TO NEXT ITEM/W43
W43. These next questions are about changes in \([R=FU MEMBER]: your / R=PROXY: their\) wealth during the last two years. \([R=FU MEMBER]: In these questions, when I refer to you I mean you and any family members living with you during that time.\]

Since January [P2YEAR], did \([R=FU MEMBER]: you [CYEAR FU COUNT>1] or anyone in your family living there] / \(R=PROXY: they]\) put aside money in any private annuities or IRAs?

1. Yes 5. No → GO TO W48

↓

W44. How much did that amount to?

$1 – 9,999,997 → GO TO W48  DK/RF

↓

W45. Was it $10,000 or more?

1. Yes 5. No DK/RF → GO TO W48

↓

W46. $50,000 or more?

W47. $5,000 or more?

1. Yes 5. No DK/RF 1. Yes 5. No DK/RF

↓

W48. (Since January [P2YEAR], did \([R=FU MEMBER]: you [CYEAR FU COUNT>1] or anyone in your family living there] / \(R=PROXY: they]\)…)

Cash in any part of a pension, private annuity or IRA?

1. Yes 5. No → GO TO W54

↓

W49. How much did that amount to?

$1 – 9,999,997 → GO TO W54  DK/RF

↓

W50. Was it $10,000 or more?

1. Yes 5. No DK/RF → GO TO W54

↓

W51. $50,000 or more?

W53. $5,000 or more?

1. Yes 5. No DK/RF 1. Yes 5. No DK/RF

↓

W52. $100,000 or more?

1. Yes 5. No DK/RF
W54. (Since January [P2YEAR], did [R=FU MEMBER: you [CYEAR FU COUNT>1: or anyone in your family living there] / 
R=PROXY: they]...)

Sell any home [R=FU MEMBER: you / R=PROXY: they] were using as [R=FU MEMBER: your / R=PROXY: their] main dwelling?

1. Yes 5. No → GO TO W59

↓

W55. 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, [P2YEAR]

$ 1 – 9,999,997 → GO TO W59 DK/RF

↓

W56. Was it $60,000 or more?

1. Yes

↓

W57. $120,000 or more?

1. Yes

↓

W58. $30,000 or more?

1. Yes

↓

W59A. (Since January [P2YEAR], did [R=FU MEMBER: you [CYEAR FU COUNT>1: or anyone in your family living there] / 
R=PROXY: they]...)

Buy or sell any real estate other than [R=FU MEMBER: your / R=PROXY: their] main home, such as a vacation home, land (not including farmland), or rental property?

• If R says only “Yes”, PROBE: Did [R=FU MEMBER: you / R=PROXY: they] buy only, sell only, or both?
• If needed: Real estate [A19=OWNS: other than [[R=FU MEMBER: your / R=PROXY: their] main home,] such as a vacation home, land (not including farmland), or rental property

1. Yes, bought only

2. Yes, sold only

3. Yes, both bought and sold

5. No, neither

↓

GO TO W65

↓

GO TO W69

W60. Altogether, how much money did [R=FU MEMBER: you [CYEAR FU COUNT>1: or anyone in your family living there] / 
R=PROXY: they] spend on (real estate) (since January [P2YEAR])?

• If needed: Real estate [A19=OWNS: other than [[R=FU MEMBER: your / R=PROXY: their] main home,] such as a vacation home, land (not including farmland), or rental property

$ 1 – 9,999,997 → GO TO W65CKPT DK/RF

↓

W61. Was it $60,000 or more?

1. Yes

↓

W62. $120,000 or more?

1. Yes

↓

W63. $30,000 or more?

1. Yes

↓
W65CKPT. CAI CHECKPOINT: WHETHER R BOTH BOUGHT AND SOLD REAL ESTATE (W59A)

1. BOTH BOUGHT AND SOLD  5. ALL OTHERS   GO TO W69

W65. Altogether, how much money did [R=FU MEMBER: you [CYEAR FU COUNT>1: or anyone in your family living there] / R=PROXY: they] get from selling real estate (since January [P2YEAR])?

- If needed: Real estate [A19=OWNS: other than [[R=FU MEMBER: your / R=PROXY: their] main home,] such as a vacation home, land (not including farmland), or rental property

$ 1 – 999,999,997   GO TO  DK/RF

W66. Was it $60,000 or more?

1. Yes  5. No  DK/RF   GO TO W69

W67. $120,000 or more?

1. Yes  5. No  DK/RF

W68. $30,000 or more?

1. Yes  5. No  DK/RF

W69. (Since January [P2YEAR], did [R=FU MEMBER: you [CYEAR FU COUNT>1: or anyone in your family living there] / R=PROXY: they]...)

Make additions or improvements totaling $10,000 or more to any homes or other real estate [R=FU MEMBER & CYEAR FU COUNT=1: you / R=FU MEMBER & CYEAR FU COUNT>1: any of you / R=PROXY & CYEAR FU COUNT=1: they / R=PROXY & CYEAR FU COUNT>1: any of them] owned? Do not count general maintenance or upkeep.

1. Yes  5. No   GO TO W73A

W70. What was the total dollar cost of the additions or improvements, plus the value of any work [R=FU MEMBER: you / R=PROXY: they] may have done [R=FU MEMBER: yourself / R=PROXY: themselves]?

$ 10,000 – 9,999,997   GO TO W73A  DK/RF

W71. Was it $25,000 or more?

1. Yes  5. No  DK/RF

W72. $75,000 or more?

1. Yes  5. No  DK/RF
W73A. (Since January [P2YEAR], did [R=FU MEMBER: you [CYEAR FU COUNT>1: or anyone in your family living there] / R=PROXY: they]...)

Put money into or sell part or all of [R=FU MEMBER: your / R=PROXY: their] interest in a business or farm?
- If R says only "Yes", PROBE: Did [R=FU MEMBER: you / R=PROXY: they] put money in only, sell only, or both?

1. Yes, put money in only
2. Yes, sold only
3. Yes, both put money in and sold
4. No, neither

↓
GO TO W79
↓
GO TO W83

W74. Altogether, how much money did [R=FU MEMBER: you [CYEAR FU COUNT>1: or anyone in your family living there] / R=PROXY: they] put into a (business or farm) (since January [P2YEAR])?

$ 1 – 9,999,997 → GO TO W79CKPT
DK/RF

W75. Was it $25,000 or more?

1. Yes
5. No → GO TO W79CKPT

↓

W76. $100,000 or more?

1. Yes
5. No

DK/RF

↓

W77. $10,000 or more?

1. Yes
5. No

DK/RF

↓

W79CKPT. CAI CHECKPOINT: WHETHER R BOTH PUT MONEY INTO AND SOLD FARM/BUSINESS (W73A)

1. BOTH PUT MONEY INTO AND SOLD
5. ALL OTHERS → GO TO W83A

↓

W79. Altogether, how much money did [R=FU MEMBER: you [CYEAR FU COUNT>1: or anyone in your family living there] / R=PROXY: they] get from selling a business or farm (since January [P2YEAR])?

$ 1 – 999,999,997 → GO TO W83A
DK/RF

W80. Was it $25,000 or more?

1. Yes
5. No → GO TO W83A

↓

W81. $100,000 or more?

1. Yes
5. No

DK/RF

↓

W82. $10,000 or more?

1. Yes
5. No

DK/RF

↓
W83A. (Since January [P2YEAR], did [R=FU MEMBER: you [CYEAR FU COUNT>1: or anyone in your family living there] / R=PROXY: they]...)

Buy or sell any shares of stock in publicly held corporations, stock mutual funds, or investment trusts, including any automatic reinvestments – not including any IRAs?

- If R says “Yes”, PROBE: Did [R=FU MEMBER: you / R=PROXY: they] buy only, sell only, or both?
  1. Yes, bought only
  2. Yes, sold only
  3. Yes, both bought and sold
  5. No, neither

↓
GO TO W97
↓
GO TO W102CKPT

W91. Altogether, how much money did [R=FU MEMBER: you [CYEAR FU COUNT>1: or anyone in your family living there] / R=PROXY: they] spend on (shares of) stocks (since January [P2YEAR])?

$ 1 – 9,999,997 → GO TO W97CKPT
DK/RF
↓

W92. Was it $20,000 or more?

1. Yes
5. No

DK/RF → GO TO W97CKPT
↓

W93. $50,000 or more?

1. Yes
5. No

DK/RF
↓
GO TO W97CKPT

W94. $100,000 or more?

1. Yes
5. No

DK/RF
↓

W97CKPT. CAI CHECKPOINT: WHETHER R BOTH BOUGHT AND SOLD SHARES OF STOCK (W83A=3)

1. BOTH BOUGHT AND SOLD
5. ALL OTHERS
→ GO TO W102CKPT
↓

W97. Altogether, how much money did [R=FU MEMBER: you [CYEAR FU COUNT>1: or anyone in your family living there] / R=PROXY: they] get from selling (shares of) stocks (since January [P2YEAR])?

$ 1 – 999,999,997 → GO TO W102CKPT
DK/RF
↓

W98. Was it $20,000 or more?

1. Yes
5. No

DK/RF → GO TO W102CKPT
↓

W99. $50,000 or more?

1. Yes
5. No

DK/RF
↓
GO TO W102CKPT

W100. $100,000 or more?

1. Yes
5. No

DK/RF
W102CKPT. CAI CHECKPOINT: WHETHER THERE ARE MOVERS-OUT 18+ YEARS OLD ON FAMILY LISTING

1. MOVERS-OUT AGE 18+ → 5. ALL OTHERS → GO TO W112CKPT

W102. Sometimes changes in a family’s savings or assets are due to people joining or leaving the family. Was there anyone living with [R=FU MEMBER: you / R=PROXY: them] in January [P2YEAR] who doesn’t live with [R=FU MEMBER: you / R=PROXY: them] now and who took $5,000 or more in assets or debts away with them?

1. Yes 5. No → GO TO W102CKPT

W103. Altogether, what is the total dollar value of assets that were removed that way?

$ 0 – 9,999,997 → GO TO W108

DK/RF

W104. Was it $10,000 or more?

1. Yes 5. No → GO TO W108

DK/RF

W105. $25,000 or more?

1. Yes 5. No → GO TO W108

DK/RF

W106. $100,000 or more?

1. Yes 5. No → GO TO W108

DK/RF

W108. Altogether, what is the total dollar value of debts that were removed that way?

$ 0 – 9,999,997 → GO TO W112CKPT

DK/RF

W109. Was it $10,000 or more?

1. Yes 5. No → GO TO W112CKPT

DK/RF

W110. $25,000 or more?

1. Yes 5. No → GO TO W112CKPT

DK/RF

W111. $5,000 or more?

1. Yes 5. No → GO TO W112CKPT

DK/RF

W108 SOFT CHECK (SUPPRESS=continue, CLOSE=W108, GOTO=W103/W108)

IF W103 + W108 < $ 5,000:

Reported assets and debts removed total less than $5,000

Please verify amounts at W103 and W108

W112CKPT. CAI CHECKPOINT=WHETHER THERE ARE MOVERS-IN 18+ YEARS OLD ON FAMILY LISTING

1. MOVERS-IN AGE 18+ → 5. ALL OTHERS → GO TO W123
W113. Is there anyone in \([R=FU\ MEMBER:\ your\ /\ R=PROXY:\ their]\) family living with \([R=FU\ MEMBER:\ you\ /\ R=PROXY:\ them]\) now who has joined the family since January \([P2YEAR]\) and who had $5,000 or more in assets or debts at the time they joined the family?

1. Yes 5. No → GO TO W123

↓

W114. Altogether, what is the total dollar value of assets that were brought into the family that way?

$ 0 – 9,999,997 → GO TO W119

↓

W115. Was it $10,000 or more?

1. Yes 5. No DK/RF → GO TO W119

↓

W116. $25,000 or more?

W118. $5,000 or more?

1. Yes 5. No DK/RF 1. Yes 5. No DK/RF

↓

W117. $100,000 or more?

1. Yes 5. No DK/RF

↓

W119. Altogether, what is the total dollar value of debts that were brought into the family that way?

$ 0 – 9,999,997 → GO TO W123

↓

W120. Was it $10,000 or more?

1. Yes 5. No DK/RF → GO TO W123

↓

W121. $25,000 or more?

W122. $5,000 or more?

1. Yes 5. No DK/RF 1. Yes 5. No DK/RF

↓

W119 SOFT CHECK (SUPPRESS=continue, CLOSE=W119, GOTO=W114/W119): IF W114 + W119 < $ 5,000:

Reported assets and debts brought total less than $5,000
Please verify amounts at W114 and W119

W123. Some people’s assets come from gifts and inheritances. During the last two years, have \([R=FU\ MEMBER:\ you\ [CYEAR\ FU\ COUNT]>1:\ or\ anyone\ in\ your\ family\ living\ there]\ /\ R=PROXY:\ they]\) received any large gifts or inheritances of money or property worth $10,000 or more?

1. Yes 5. No → GO TO SECTION P

↓

W124. What year did \([R=FU\ MEMBER:\ you\ /\ R=PROXY:\ they]\) receive that?

• ENTER actual year \([P2YEAR], [PYEAR],\ or [CYEAR]\)
• ENTER [9997] if it has not yet been received

[P2YEAR] – [CYEAR] 9997. Not yet received → GO TO W128

↓
W125. How much was it worth altogether, at that time?

$10,000 – 9,999,997 \rightarrow \text{GO TO W128} \quad \text{DK/RF}

\downarrow

W126. Would it amount to $25,000 or more?

1. Yes  5. No  \quad \text{DK/RF}

\downarrow \quad \text{GO TO W128}

W127. $75,000 or more?

1. Yes  5. No  \quad \text{DK/RF}

\downarrow

W128. Did [R=FU MEMBER: you / R=PROXY: they] receive any other large gifts or inheritances of money or property in the last two years?

1. Yes \rightarrow \text{REPEAT W124-W128; MAX=3; THEN GO TO SECTION P}  \quad 5. No \quad \text{GO TO SECTION P}
Section P: Pensions

P0CKPT1. CAI CHECKPOINT LOOP 1 - HEAD (P70ACKPT LOOP 2 - WIFE/"WIFE")

1. WORKING NOW (HAS CMJ: BCDE1=1, 2 OR BCDE3=YES)
2. NEVER WORKED (BCDE1<>1, 2, DK/RF AND BCDE3=YES AND BCDE3A<>YES AND BC/DE62=NO, DK/RF)
3. NOT WORKING NOW and RETIRED, DISABLED, KEEPING HOUSE, STUDENT, OTHER; HAS WORKED SINCE 1/1/P2YEAR OR HAS EVER WORKED (BCDE1=4-8 AND (BCDE3A=YES (HAS MRMJ) OR BC/DE62=YES))
4. NOT WORKING NOW and NOT RETIRED, DISABLED, KEEPING HOUSE, STUDENT, OTHER; HAS WORKED SINCE 1/1/P2YEAR OR HAS EVER WORKED (BCDE1=3, DK/RF AND (BCDE3A=YE: (HAS MRMJ) OR BC/DE62=YES))

<table>
<thead>
<tr>
<th>1. WORKING NOW, TEMP LAID OFF, SICK/MATERNITY LEAVE</th>
<th>NOT WORKING NOW</th>
<th>5. NOT WORKING: UNEMPLOYED, DK/RF</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. NEVER WORKED</td>
<td>GO TO P70ACKPT</td>
<td>GO TO P40CKPT</td>
</tr>
<tr>
<td>3. NOT WORKING: RETIRED, DISABLED, KEEPING HOUSE, STUDENT, OTHER</td>
<td>GO TO P45</td>
<td></td>
</tr>
<tr>
<td>4. NOT WORKING: UNEMPLOYED, DK/RF</td>
<td>GO TO P40CKPT</td>
<td></td>
</tr>
</tbody>
</table>

PDETAILAQSN. AQSN OF HEAD/WIFE/"WIFE"

P1. [CYAQRTH, CYNAMF CYNAML], Current Employer: [EMPNAME] ([BEGMO/BEGYR]-[ENDMO/ENDYR])

[FIRST ITERATION: Next, I need to get some information about pensions and retirement plans.]
Not including Social Security or Railroad Retirement, [are you / is [HEAD / WIFE/"WIFE"]] participating in a pension or retirement plan through [your / his / her] present job [EMPLOYER NAME IS RESPONSE: at [CMJ EMPLOYER]] [BC27/DE27=YES; or through [your / his / her] union?]
- If R says “participating but hasn’t recently contributed”, ENTER [1]
- If R says “eligible but not participating”, ENTER [5]

<table>
<thead>
<tr>
<th>1. Yes</th>
<th>5. No DK/RF</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO P6CKPT</td>
<td>GO TO P40CKPT</td>
</tr>
</tbody>
</table>

P1A. [CYAQRTH, CYNAMF CYNAML], Current Employer: [EMPNAME] ([BEGMO/BEGYR]-[ENDMO/ENDYR])

[Are you / Is [he / she]] currently eligible for such a plan?

<table>
<thead>
<tr>
<th>1. Yes</th>
<th>5. No DK/RF</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO P40CKPT</td>
<td>GO TO P40CKPT</td>
</tr>
</tbody>
</table>

P7. [CYAQRTH, CYNAMF CYNAML], Current Employer: [EMPNAME] ([BEGMO/BEGYR]-[ENDMO/ENDYR])

Will [you / he / she] become eligible for such a plan if [you / he / she] continue[s] to work for this employer?

<table>
<thead>
<tr>
<th>1. Yes</th>
<th>5. No</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO P40CKPT</td>
<td></td>
</tr>
</tbody>
</table>

P6CKPT. CAI CHECKPOINT: WHETHER H/W/"W" HAS SAME CMJ AS LAST WAVE (EMPLOYEHC[1/2].SAMECMJ); PRELOAD ELIGIBLE H/W/"W" IS CYAQRTH=101,102, 202, 222 & CYFUHU=FU & ID68=PRELOAD ID68 & PN=PRELOAD PN

<table>
<thead>
<tr>
<th>1. SAME CMJ &amp; PRELOAD PP6YRS= RESPONSE</th>
<th>5. ALL OTHERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>USE PRELOAD + 2 YRS;</td>
<td>GO TO P11</td>
</tr>
</tbody>
</table>
P6YRS. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([EMPNAME] ([BEGMO/BEGYR]-[ENDMO/ENDYR]))

How many years [have / has] [you / he / she] been participating in this plan?

- If R says there are multiple plans, PROBE: Please tell me about the plan [you / he / she] [have / has] participated in the longest.
- ENTER number of years in pension or retirement plan or PRESS [ENTER] to go to the next screen to record the year started

[ENTER] 0 – 50 DK/RF
↓
GO TO P11

P6YR. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([EMPNAME] ([BEGMO/BEGYR]-[ENDMO/ENDYR]))

(In which year did [you / he / she] start participating in this plan?)

- If R says there are multiple plans, PROBE: Please tell me about the plan [you / he / she] [have / has] participated in the longest.
- ENTER year started in pension or retirement plan

1901 – [CYEAR]

P11. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([EMPNAME] ([BEGMO/BEGYR]-[ENDMO/ENDYR]))

[Are you / Is [he / she]] making any contributions to [your / his / her] pension or retirement account such as having money deducted from your [your / his / her] pay?

1. Yes 5. No → GO TO P16
↓

P12. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([EMPNAME] ([BEGMO/BEGYR]-[ENDMO/ENDYR]))

[Are you / Is [he / she]] required to contribute?

1. Yes 5. No → GO TO P15AMT
↓

P13AMT. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([EMPNAME] ([BEGMO/BEGYR]-[ENDMO/ENDYR]))

What amount or percent of pay [are you / is [he / she]] required to contribute?

- ENTER dollar amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)
- OR press [ENTER] to continue to next screen for Percent

$1 – 9,999,997 [DK/RF] → GO TO P14
↓

P13PER. The amount entered is: [P13AMT] per _____

- SELECT the unit of time below

<table>
<thead>
<tr>
<th></th>
<th>3. Week</th>
<th>4. Two weeks</th>
<th>5. Month</th>
<th>6. Year</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>7. Other-specify (P13PERSPEC. Specify. (String 100))</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

GO TO P14
P13PCT. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([EMPNAME] ([BEGMO/BEGYR]-[ENDMO/ENDYR]))
(What percent of pay [are you / is [he / she]] required to contribute?)
- ENTER a percentage from 1 to 25
  1 – 25

P14. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([EMPNAME] ([BEGMO/BEGYR]-[ENDMO/ENDYR]))
[Do / Does] [you / he / she] also make voluntary contributions?
1. Yes  5. No → GO TO P16
↓

P15AMT. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([EMPNAME] ([BEGMO/BEGYR]-[ENDMO/ENDYR]))
What amount or percent of pay [do / does] [you / he / she] voluntarily contribute currently?
- ENTER dollar amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)
- OR press [ENTER] to continue to next screen for Percent
  [ENTER] → GO TO P15PCT  $ 1 – 9,999,997  DK/RF → GO TO P16
↓

P15PER. The amount entered is: [P15AMT] per ____
- SELECT the unit of time below
  3. Week  4. Two weeks  5. Month  6. Year
  7. Other-specify (P15PERSPEC. Specify. (String 100))
GO TO P16

P15PCT. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([EMPNAME] ([BEGMO/BEGYR]-[ENDMO/ENDYR]))
(What percent of pay [do / does] [you / he / she] voluntarily contribute currently?)
- ENTER a percentage from 1 to 25
  1 – 25

P16. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([EMPNAME] ([BEGMO/BEGYR]-[ENDMO/ENDYR]))
HEAD: Some pension and retirement plans base benefits on a formula involving age, years of service and salary, often called a defined benefit plan. Some plans base benefits on how much money has accumulated in a person’s pension or retirement account, often called a defined contribution plan. Other plans use both ways of setting benefits.
W/”W” & HEAD ALSO ASKED: (Some pension and retirement plans base benefits on a formula involving age, years of service and salary, often called a defined benefit plan. Some plans base benefits on how much money has accumulated in a person’s pension or retirement account, often called a defined contribution plan. Other plans use both ways of setting benefits.)
What type of plan [do / does] [you / HEAD / WIFE/”WIFE”] have?
- Defined Contribution plans include 401-K, 403-B, ESOP, SRA, thrift/savings, stock/profit sharing, and money purchase plans

  1. Defined benefit plan
  5. Defined contribution plan / Money accumulated in account
  7. Both  DK/RF
GO TO P22CKPT
P17. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([EMPNAME] ([BEGMO/BEGYR]-
[ENDMO/ENDYR]))

Does [your / his / her] employer make contributions to [your / his / her] account?

1. Yes  5. No → GO TO P20

P18AMT. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([EMPNAME]
([BEGMO/BEGYR]-[ENDMO/ENDYR]))

What amount or percent of pay does [your / his / her] employer contribute to [your / his / her] account?

- ENTER dollar amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)
- OR press [ENTER] to continue to next screen for Percent of pay or Percent of employee contribution

$[1 – 9,999,997] DK/RF → GO TO P19CKPT

P18PER. The amount entered is: [P18AMT] per ___

- SELECT the unit of time below

3. Week  4. Two weeks  5. Month  6. Year
7. Other-specify [P18PERSPEC. Specify. (String 100)]

GO TO P19CKPT

P18PCT. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([EMPNAME] ([BEGMO/BEGYR]-
[ENDMO/ENDYR]))

(What percent of pay does [your / his / her] employer contribute to [your / his / her] account?)

- ENTER a percentage of pay from 1 to 25
- OR press [ENTER] to continue to next screen for Percent of employee contribution

[ENTER]  1 – 25  DK/RF

GO TO P19CKPT

P18PCTB. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([EMPNAME]
([BEGMO/BEGYR]-[ENDMO/ENDYR]))

(What percent of [your / his / her] contribution does [your / his / her] employer contribute to [your / his / her] account?)

- ENTER a percentage of employee contribution from 1 to 200

1 – 200

P19CKPT. CAI CHECKPOINT: WHETHER H/W/“W” IS 40 YEARS OLD OR OLDER (AGEIWDATE)

1. 40+ YRS OLD  5. ALL OTHERS → GO TO P20

P19. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([EMPNAME] ([BEGMO/BEGYR]-
[ENDMO/ENDYR]))

At what age could [you / he / she] first receive retirement benefits that include [your / his / her] employer’s contributions?

31 – 100
P20. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([EMPNAME] ([BEGMO/BEGYR]-[ENDMO/ENDYR]))

What is the approximate dollar amount in [your / his / her] account now?

$1 – 999,999,997 → GO TO P20A

P20B. Is it $50,000 or more?

1. Yes
5. No → GO TO P20A

P20C. $100,000 or more?

1. Yes
5. No → GO TO P20A

P20D. $200,000 or more?

1. Yes
5. No

P20E. $20,000 or more?

1. Yes
5. No

P20A. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([EMPNAME] ([BEGMO/BEGYR]-[ENDMO/ENDYR]))

Are the funds invested mostly in stocks and stock mutual funds, or mostly in bonds, bond mutual funds and annuities, or some of each?

1. Mostly (or all) stocks
2. Some of each
3. Mostly (or all) bonds and annuities

P22CKPT. CAI CHECKPOINT: WHETHER H/W/"W" IS 40 YEARS OLD OR OLDER (AGEIWDATE); WHETHER PENSION IS DB (P16=1), DC (P16=5), BOTH (P16=7)

1. AGE=40+ & DEFINED BENEFIT 5. DEFINED CONTRIBUTION 7. AGE=40+ & BOTH ALL OTHERS

GO TO P32

GO TO P32

P22A. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([EMPNAME] ([BEGMO/BEGYR]-[ENDMO/ENDYR]))

What is the earliest age at which [you / he / she] would be eligible to receive “full” or “normal” pension or retirement benefits?

• ENTER number of years; ENTER months at next screen
• ENTER [997] for Any time; any age; no age requirement
• If R says “already eligible”, PROBE: What is the earliest age at which [you / he / she] would have been eligible (to receive full” or “normal” pension or retirement benefits)?

31 – 100
997. Any time; any age; no age requirement (IF VOL)

GO TO P22C

P22B. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([EMPNAME] ([BEGMO/BEGYR]-[ENDMO/ENDYR]))

(What is the earliest age at which [you / he / she] would be eligible to receive “full” or “normal” pension or retirement benefits?)

• ENTER number of months; PRESS [ENTER] for no months
P22C. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([EMPNAME] ([BEGMO/BEGYR]-[ENDMO/ENDYR]))
What is the earliest age at which [you / he / she] could leave [your / his / her] employer and receive any (pension or retirement) benefits immediately?

- ENTER number of years; ENTER months at next screen
- ENTER [997] for Any time; any age; no age requirement
- If R says “already eligible”, PROBE: What is the earliest age at which [you / he / she] could have done so (leave [your / his / her] employer and receive any (pension or retirement) benefits immediately)?

31 – 100 997. Any time; any age; no age requirement (IF VOL) DK /RF

GO TO P32

P22D. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([EMPNAME] ([BEGMO/BEGYR]-[ENDMO/ENDYR]))
(What is the earliest age at which [you / he / she] could leave [your / his / her] employer and receive any (pension or retirement) benefits immediately?)

- ENTER number of months; PRESS [ENTER] for no months

P32. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([EMPNAME] ([BEGMO/BEGYR]-[ENDMO/ENDYR]))
At what age [do / does] [you / he / she] expect to start receiving retirement benefits from this pension or retirement plan?

- ENTER [997] for Never; won’t stay long enough

[CURRENT AGE (18)] – 95 997. Never; won’t stay long enough DK /RF

GO TO P39AGE

P34AMT. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([EMPNAME] ([BEGMO/BEGYR]-[ENDMO/ENDYR]))
How much [do / does] [you / he / she] expect to receive (either as a percent of [your / his / her] pay at retirement or as an amount per month or year)?

- ENTER dollar amount here, then SELECT unit of time on next screen (Month, Year)
- OR press [ENTER] to continue to next screen for Percent

[ENTER] → GO TO P34PCT $1 – 9,999,997 DK /RF → GO TO P34F

GO TO P39AGE

P34PER. The amount entered is: [P34AMT] per _____

- SELECT the unit of time below

5. Month 6. Year 7. Other-specify (P34PERSPEC. Specify. (String 100))
P34PCT. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([EMPNAME] ([BEGMO/BEGYR]-[ENDMO/ENDYR]))
(How much [do / does] [you / he / she] expect to receive (as a percent of [your / his / her] pay at retirement)?)

- ENTER a percentage from 1 to 100

1 – 100 → GO TO P39AGE

P34F. Will it be 40% of [your / his / her] pay or more?

1. Yes 5. No DK/RF → GO TO P39AGE

P34G. 60% or more (of [your / his / her] pay)?:

1. Yes 5. No DK/RF

P34H. 80% or more (of [your / his / her] pay)?

1. Yes 5. No DK/RF

P39AGE. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([EMPNAME] ([BEGMO/BEGYR]-[ENDMO/ENDYR]))
On [your / his / her] present job [EMPLOYER NAME IS RESPONSE: at [CMJ EMPLOYER]], 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?

- ENTER usual age of retirement or press [ENTER] to continue to next screen for years of service

[ENTER] 20 – 75 DK/RF

GO TO P40CKPT

P39YRS. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([EMPNAME] ([BEGMO/BEGYR]-[ENDMO/ENDYR]))
(What is the usual number of years of service for retirement?)

- ENTER number of years

1 – 50

P40CKPT. CAI CHECKPOINT: WHETHER H/W/"W" IS 40 YEARS OLD OR OLDER (AGEIWDATE)

1. 40+ YRS OLD 5. ALL OTHERS → GO TO P42CKPT

P40AGE. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([EMPNAME] ([BEGMO/BEGYR]-[ENDMO/ENDYR]))
Now I want to ask about [your / HEAD’s / WIFE’s/"WIFE’s"] plans for retirement. At what age [do / does] [you / he / she] plan to stop working?

- ENTER age or press [ENTER] to continue to next screen for number of years
- ENTER [996] for Already stopped working
- ENTER [997] for Never

[ENTER] 17 – [CURRENT AGE (95)] 996. Already stopped working 997. DK/RF

GO TO P42CKPT
P40NUM. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([EMPNAME] ([BEGMO/BEGYR]-[ENDMO/ENDYR]))
(In how many years [do / does] [you / he / she] plan to stop working?)

- ENTER number of years
  1–50 DK/RF

P42CKPT. CAI CHECKPOINT: WHETHER HEAD/WIFE/"WIFE" IS WORKING NOW (BCDE1=1, 2 OR BCDE3=1)

1. WORKING NOW, TEMP LAID OFF, OR ON SICK/MATERNITY LEAVE
5. ALL OTHERS → GO TO P45

P42. [CYAQRTH, CYNAMF CYNAML], Other Plan(s) Through Current Employer ([EMPNAME] ([BEGMO/BEGYR]-[ENDMO/ENDYR]))
[P1=YES: In addition to the pension or retirement plan you already mentioned, [do / does] [you / HEAD / WIFE/"WIFE"] / ALL OTHERS: [Do / Does] [you / HEAD / WIFE/"WIFE"] 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 P45

↓

P43. [CYAQRTH, CYNAMF CYNAML], Other Plan(s) Through Current Employer ([EMPNAME] ([BEGMO/BEGYR]-[ENDMO/ENDYR]))
Does [your / his / her] employer make contributions to any such plan for [you / him / her]?

1. Yes 5. No → GO TO P45

↓

P44AMT. [CYAQRTH, CYNAMF CYNAML], Other Plan(s) Through Current Employer ([EMPNAME] ([BEGMO/BEGYR]-[ENDMO/ENDYR]))
What amount or percent of pay does [your / his / her] employer contribute?

- ENTER dollar amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)
- OR press [ENTER] to continue to next screen for Percent of pay or Percent of employee contribution

[ENTER] → GO TO P44PCT
$1–9,999,997 DK/RF → GO TO P45

↓

P44PCT. [CYAQRTH, CYNAMF CYNAML], Other Plan(s) Through Current Employer ([EMPNAME] ([BEGMO/BEGYR]-[ENDMO/ENDYR]))
(What percent of pay does [your / his / her] employer contribute?)

- ENTER a percentage of pay from 1 to 25
- OR press [ENTER] to continue to next screen for Percent of employee contribution

[ENTER] 1–25 DK/RF

GO TO P45
P44PCTB. [CYAQRTH, CYNAMF CYNAML], Other Plan(s) Through Current Employer ((EMPNAME (BEGMO/BEGYR)-(ENDMO/ENDYR)))
(What percent of [your / his / her] contribution does [your / his / her] employer contribute?)
• ENTER a percentage of employee contribution from 1 to 200

1 – 200

P45. [CYAQRTH, CYNAMF CYNAML]
[LOOP 2 & WIFE/"WIFE" NOT WORKING NOW: (These next questions are about [your / HEAD’s / WIFE’s/"WIFE’s"] pensions or retirement plans through a former employer.)] / ALL OTHERS: These next questions are about [your / HEAD’s / WIFE’s/"WIFE’s"] pensions or retirement plans through a former employer.).
Aside from IRA or Keogh Plans, [do / does] [you / HEAD / WIFE/"WIFE"] have any pensions or retirement plans from previous employers from which [you / he / she] [G40/G61 =RETIREMENT,PENSION,IRA: [have / has] not begun to receive regular benefit payments but] expect[s] to receive benefits?

1. Yes 5. No → GO TO P70CKPT

↓

P45A. [CYAQRTH, CYNAMF CYNAML]
How many such (pension or retirement) plans (through a former employer) do you have from which you expect to receive benefits?

1 – 5

P46. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer
HEAD & P1=YES & P46 LOOP 1: What type of plan was this second pension or retirement plan? A defined benefit plan that bases benefits on a formula involving age, years of service and salary, or a defined contribution plan that bases benefits on how much money has accumulated in a person’s pension or retirement account?
W/"W" & HEAD NOT ASKED: What type of plan was this second pension or retirement plan? A defined benefit plan that bases benefits on a formula involving age, years of service and salary, or a defined contribution plan that bases benefits on how much money has accumulated in a person’s pension or retirement account?

W/"W" & HEAD ALSO ASKED & P1=YES & P46 LOOP 1:
What type of plan was this second pension or retirement plan?
(A defined benefit plan that bases benefits on a formula involving age, years of service and salary, or a defined contribution plan that bases benefits on how much money has accumulated in a person’s pension or retirement account?)

HEAD & P1<>YES & P46 LOOP 1: I would like to know what type of plan this was. Was it a defined benefit plan that bases benefits on a formula involving age, years of service and salary, or a defined contribution plan that bases benefits on how much money has accumulated in a person’s pension or retirement account?
W/"W" & HEAD NOT ASKED: I would like to know what type of plan this was. Was it a defined benefit plan that bases benefits on a formula involving age, years of service and salary, or a defined contribution plan that bases benefits on how much money has accumulated in a person’s pension or retirement account?

W/"W" & HEAD ALSO ASKED & P1<>YES & P46 LOOP 1: I would like to know what type of plan this was. Was it a defined benefit plan that bases benefits on a formula involving age, years of service and salary, or a defined contribution plan that bases benefits on how much money has accumulated in a person’s pension or retirement account?)
**P46 LOOP2:**

I would like to know what type of plan this was.
(Was it a [defined benefit plan](#) that bases benefits on a formula involving age, years of service and salary, or a [defined contribution plan](#) that bases benefits on how much money has accumulated in a person’s pension or retirement account?)

- [P45A>1 PLAN: If needed: Tell us about the [P46 LOOP 2: next] most important plan](#)
- Defined Contribution plans include 401-K, 403-B, ESOP, SRA, thrift/savings, stock/profit sharing, and money purchase plans

1. Defined benefit plan 5. Defined contribution plan 7. Both

GO TO P52 GO TO P62ACKPT \( \downarrow \) GO TO P52 GO TO P70CKPT

**P47. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer**

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?

$ \( 0 – 99,999,997 \) \( \rightarrow \) GO TO P48

**P47B. Was it $20,000 or more?**

1. Yes 5. No \( \rightarrow \) GO TO P48

**P47C. $50,000 or more?**

1. Yes 5. No \( \rightarrow \) GO TO P48

**P47D. $150,000 or more?**

1. Yes 5. No \( \rightarrow \) GO TO P48

**P48. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer**

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, ENTER [7] and record all details**

1. Withdrew the money \( \rightarrow \) GO TO P52

2. Rolled over into IRA \( \rightarrow \) GO TO P49

3. Left to accumulate \( \rightarrow \) GO TO P50

4. Converted to annuity \( \rightarrow \) GO TO P50

7. Other; more than one mention-specify (P48SPEC. Specify. (String 100)) \( \rightarrow \) GO TO P52
P49. [CYAQRTH, CYNAMF CYNAML], Plan #1 / 2 Through a Former Employer
How much is in [your / his / her] account now?

$ 1 – 99,999,997 → GO TO P52

P49. Is it $50,000 or more?

1. Yes 5. No → GO TO P52

↓

P49C. $100,000 or more?  P49E. $20,000 or more?

1. Yes 5. No → GO TO P52

↓

P49D. $200,000 or more?

1. Yes 5. No → GO TO P52

↓

GO TO P52

P50. [CYAQRTH, CYNAMF CYNAML], Plan #1 / 2 Through a Former Employer
How old [were / was] [you / he / she] when [you / he / she] started receiving the benefits from that annuity?

• IF benefits have not yet begun, PROBE: At what age will [you / he / she] begin receiving them?

20 – 75

P51. [CYAQRTH, CYNAMF CYNAML], Plan #1 / 2 Through a Former Employer
How much are the annuity benefits per month or year?

• IF benefits have not yet begun, PROBE: What will the benefits be once [you / he / she] begin[s] receiving them?

• ENTER dollar amount here, then SELECT unit of time on next screen (Month, Year)

$ 1 – 9,999,997 → GO TO P51B

↓

P51. The amount entered is: [P51] per ____

• SELECT the unit of time below

5. Month 6. Year 7. Other-specify (P51PERSPEC. Specify. (String 100))

GO TO P52

P51B. Are they $400 or more per month?

1. Yes 5. No → GO TO P52

↓

P51C. $1,200 or more (per month)?  P51E. $200 or more (per month)?

1. Yes 5. No → GO TO P52

↓

P51D. $1,600 or more (per month)?

1. Yes 5. No → GO TO P52
P52. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer

[\text{P46=BOTH}: \text{Now about the part of [your / his / her] pension or retirement plan where benefits are based on a formula. / ALL OTHERS: (Now about the part of [your / his / her] pension or retirement plan where benefits are based on a formula.)}]

[Do / Does] [\text{you / HEAD / WIFE/"WIFE"}] 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
6. Other—specify \((P52SPEC. \text{ Specify. (String 100)})\)

DK/RF

P52ACKPT. CAI CHECKPOINT: WHETHER RECEIVING BENEFITS \((P52=2)\); WHETHER PRELOAD ELIGIBLE H/W/"W"

\(\text{CYAQRTH}=101,102, 202, 222\) & \(\text{CYFUHU}=\text{FU}\) & \(\text{ID68}=\text{PRELOAD}\) & \(\text{ID68} \& \text{PN}=\text{PRELOAD PN}\)

P53YR. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer

In what year did [\text{you / he / she}] start to receive these benefits?

- ENTER the year below

\(1901 – [\text{CYEAR}]\)

P54. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer

How much are the benefits per month or year?

- IF benefits have not yet begun, PROBE: What will the benefits be once [\text{you / he / she}] begin[s] receiving them?

- ENTER dollar amount here, then SELECT unit of time on next screen (Month, Year)

\(\$ 1 – 9,999,997\) \(\rightarrow\) GO TO P54B

\(\downarrow\)

P54PER. The amount entered is: [P54] per ______

- SELECT the unit of time below

5. Month 6. Year 7. Other—specify \((P54PERSPEC. \text{ Specify. (String 100)})\)

GO TO P55
P54B. Are they $400 or more per month?
1. Yes
5. No DK/RF → GO TO P55

P54C. $1,200 or more (per month)?
1. Yes
5. No DK/RF → GO TO P55

P54D. $1,600 or more (per month)?
1. Yes
5. No DK/RF

P54E. $200 or more (per month)?
1. Yes
5. No DK/RF

P55. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer
Are the benefits adjusted for changes in the cost of living?
1. Yes → GO TO P56ACKPT
5. No DK RF → GO TO P56ACKPT

P56. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer
Have they ever been adjusted for changes in the cost of living?
1. Yes
5. No

P56ACKPT. CAI CHECKPOINT: WHETHER RECEIVED CASH (P52=3); WHETHER PRELOAD ELIGIBLE H/W/”W”
CYAQRTH=101,102, 202, 222 & CYFUHU=FU & ID68=PRELOAD ID68 & PN=PRELOAD PN

1. RECEIVED CASH & (P45A<>1 PLAN, OR PRELOAD PP52<>CASH, OR PRELOAD PPLANS>1 PLAN, OR PRELOAD PP57<>RESPONSE)
2. RECEIVED CASH & P45A=1 PLAN, & PRELOAD PP52= CASH & PRELOAD PPLANS=1 PLAN & PRELOAD PP57=RESPONSE
5. ALL OTHERS

GO TO P58ACKPT

USE PRELOAD; GO TO P58

P57. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer
How much did that cash settlement amount to?
$1 – 99,999,997 → GO TO P58

DK/RF

P57B. Was it $6,000 or more?
1. Yes
5. No DK/RF → GO TO P58

P57C. $60,000 or more?
1. Yes
5. No DK/RF → GO TO P58

P57D. $250,000 or more?
1. Yes
5. No DK/RF
P58. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer

What did [you / he / she] do with the money?

- ENTER all that apply
- PROBE: Any others?

1. Bought durables
2. Spent it
3. Saved / invested
4. Paid off debt
5. Rolled into IRA
7. Other specify (P58SPEC. Specify. (String 100))

P58ACKPT. CAI CHECKPOINT: WHETHER ROLLED $$ INTO IRA (P52=4); WHETHER PRELOAD ELIGIBLE H/W/"W"
CYAQRTH=101,102, 202, 222 & CYFUHU=FU & ID68=PRELOAD ID68 & PN=PRELOAD PN

P59. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer

How much did that IRA rollover amount to?

$ 1 – 99,999,997 → GO TO P59ACKPT

P59B. Was it $6,000 or more?

1. Yes
5. No → GO TO P59ACKPT

P59C. $60,000 or more?

1. Yes
5. No → GO TO P59ACKPT

P59D. $250,000 or more?

1. Yes
5. No

P59ACKPT. CAI CHECKPOINT: WHETHER EXPECTS BENEFITS (P52=1); WHETHER PRELOAD ELIGIBLE H/W/"W"
CYAQRTH=101,102, 202, 222 & CYFUHU=FU & ID68=PRELOAD ID68 & PN=PRELOAD PN

P60. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer

For how many years altogether [were / was] [you / he / she] included in this plan?

- INCLUDE years with other employers if same plan.

1 – 50
Plan #[1 / 2] Through a Former Employer

At what age [do / does] [you / he / she] expect to start receiving (the rest of [your / his / her]) benefits from this plan?

- ENTER [97] if already receiving all benefits
  20 – [CURRENT AGE (75)] 97. Already receiving all benefits
  ↓ GO TO P62ACKPT

Plan #[1 / 2] Through a Former Employer

How much [do / does] [you / he / she] expect to receive (, either as a percent of [your / his / her] pay when [you / he / she] left that job or as an amount per month or year)?

- ENTER dollar amount here, then SELECT unit of time on next screen (Month, Year)
- OR press [ENTER] to continue to next screen for Percent
  [ENTER] → GO TO P62PCT
  $ 1 – 999,997
  ↓ DK/RF

The amount entered is: [P62AMT] per _____

- SELECT the unit of time below
  5. Month
  6. Year
  7. Other-specify (P62PERSPEC. Specify. (String 100))

   GO TO P62ACKPT

Plan #[1 / 2] Through a Former Employer

(How much [do / does] [you / he / she] expect to receive (, as a percent of [your / his / her] pay when [you / he / she] left that job)?)

- ENTER a percentage from 1 to 100
  1 – 100
  ↓ GO TO P62KCKPT

P62F. Will it be 40% of [your / his / her] pay or more?

1. Yes
  5. No
  ↓ DK/RF

P62G. 60% or more (of [your / his / her] pay)?

1. Yes
  5. No
  ↓ DK/RF

P62J. 20% or more (of [your / his / her] pay)?

1. Yes
  5. No
  ↓ DK/RF

P62H. 80% or more (of [your / his / her] pay)?

1. Yes
  5. No

P62KCKPT. CAI CHECKPOINT: WHETHER P62PCT IS RESPONSE OR P62F- P62J IS RESPONSE

1. P62PCT =RESPONSE
  5. ALL OTHERS

   GO TO P62ACKPT
P62K. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer
And what was [your / his / her] pay when [you / he / she] left that job?)

$ 1 – 9,999,997.99 → GO TO P62ACKPT

↓

P62KPER. The amount entered is: [P62K] per _____
• SELECT the unit of time below

7. Other-specify (P62KPERSPEC. Specify. (String 100))

P62ACKPT. CAI CHECKPOINT: WHETHER PENSION IS DC (P46=5) OR DB AMOUNT IS DK/RF (P62AMT= DK/RF)

1. P62AMT IS DK/RF 3. DEFINED CONTRIBUTION 5. ALL OTHERS → GO TO P69

↓

P63. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer
How much money was in [your / his / her] account when [you / he / she] left that employer?

$ 1 – 9,999,997 → GO TO P64

↓

P63B. Was it $20,000 or more?

1. Yes 5. No → GO TO P64

↓

P63C. $50,000 or more?  P63E. $5,000 or more?

1. Yes 5. No → GO TO P64

↓

P63D. $150,000 or more?

1. Yes 5. No

↓

P64. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer
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, ENTER [7] and record all details

1. Transferred to new employer 2. Rolled over into IRA 3. Left to accumulate 4. Converted to annuity

7. Other–specify (P64SPEC. Specify. (String 100)) → GO TO P69

↓

GO TO P69
P65. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer

How much is in [your / his / her] account now?

\[ \$1 - 99,999,997 \] → GO TO P69

↓

P65B. Is it $50,000 or more?

1. Yes
5. No DK/RF → GO TO P69

↓

P65C. $100,000 or more?

1. Yes
5. No DK/RF → GO TO P69

↓

P65E. $20,000 or more?

1. Yes
5. No DK/RF

GO TO P69

↓

P65D. $200,000 or more?

1. Yes
5. No DK/RF

GO TO P69

P66. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer

How old [were / was] [you / he / she] when [you / he / she] started receiving the benefits from that annuity?

• IF benefits have not yet begun, PROBE: At what age will [you / he / she] begin receiving them?

20 – 75

P67. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer

How much are the annuity benefits per month or year?

• IF benefits have not yet begun, PROBE: What will the benefits be once [you / he / she] begin[s] receiving them?

• ENTER dollar amount here, then SELECT unit of time on next screen (Month, Year)

\[ \$1 - 9,999,997 \] → GO TO P67B

↓

P67PER. The amount entered is: [P67] per ______

• SELECT the unit of time below

5. Month
6. Year
7. Other-specify (P67PERSPEC. Specify. (String 100))

GO TO GO TO P69
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P67B. Are they $400 or more per month?

1. Yes

5. No

DK/RF → GO TO P69

↓

P67C. $1,200 or more (per month)?

1. Yes

5. No

DK/RF → GO TO P69

↓

P67D. $1,600 or more (per month)?

1. Yes

5. No

DK/RF

↓

P67E. $200 or more (per month)?

1. Yes

5. No

DK/RF

↓

P69. [CYAQRTH, CYNAME CYNFL]

[Do / Does] [you / HEAD / WIFE / "WIFE"] have any other pensions or retirement plans from a former employer (that you haven't already told me about)?

1. Yes

→ REPEAT P46-P68; MAX=2;

THEN GO TO P70CKPT

5. No

↓

P70CKPT. CAI CHECKPOINT: WHETHER WIFE / "WIFE" IN FU (CYFUHU=1, 4 & CYAQRTH=202, 222)

1. WIFE / "WIFE" IN FU

→ REPEAT P1-P69 FOR WIFE / "WIFE";

5. ALL OTHERS

THEN GO TO SECTION H

↓
Section H: Health

H1-H23 LOOP 1 HEAD / H1-H23 LOOP 2 WIFE/“WIFE” IF ONE IN FU

H1. Now I have a few questions about [your / HEAD’s / WIFE’s/“WIFE’s”] health.
Would you say [your / HEAD’s / WIFE’s/“WIFE’s”] health in general is excellent, very good, good, fair, or poor?


H1A. [RETURNING HEAD/WIFE/“WIFE”]: Since we last talked to you about [your / his / her] health, / NEW HEAD/WIFE/“WIFE”: 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  → GO TO H2  5. Worse  DK/RF → GO TO H2

↓ ➝ ↓

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

H2. [Do / Does] [you / HEAD / WIFE/“WIFE”] 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 / WIFE/“WIFE”] from doing some types of work?


↓

H4. For work [you / HEAD / WIFE/“WIFE”] can do, how much does it limit the amount of work [you / HEAD / WIFE/“WIFE”] can do - a lot, somewhat, or just a little?


H5A. These next questions ask you about health conditions that a doctor or other health professional has EVER told [you / HEAD / WIFE/“WIFE”] that [you / he / she] [have / has] or had in [your / his / her] lifetime. Has a doctor or other health professional EVER told [you / HEAD / WIFE/“WIFE”] that [you / he / she] had...

A stroke?

1. Yes  5. No → GO TO H5B

↓

H6A1. How old [were / was] [you / HEAD / WIFE/“WIFE”] the first time [you / he / she] had a stroke?

0 – [CURRENT AGE]

H6A2. [Have / Has] [you / he / she] had [SAME H/W/“W” & AGEIWDATE minus H6A1 > (REINT, SO: 2YEARS; RECON, RECSO: 4 YEARS); another stroke since our last interview in [REINT, SO: [P2YEAR] [PYIWDATE=RESPONSE: ([PYIWDATE])]/ RECON, RECSO: [P4YEAR]] [PYIWDATE=RESPONSE: ([PYIWDATE])/ ALL OTHERS: a second or subsequent stroke since that first one]?

1. Yes  5. No
H7A. How much does this condition limit [your / his / her] normal daily activities? A lot, somewhat, just a little, or not at all?

H7A2. [Are you / Is [HEAD / WIFE/"WIFE"] now taking medication because of [your / his / her] stroke or its complications?
1. Yes 5. No

H5B. (Has a doctor or other health professional EVER told [you / HEAD / WIFE/"WIFE"] that [you / he / she] had...)
A heart attack?
1. Yes 5. No

↓

H6B1. How old [were / was] [you / HEAD / WIFE/"WIFE"] the first time [you / he / she] had a heart attack?
0 – [CURRENT AGE]

H6B2. [Have / Has] [you / he / she] had [SAME H/W/"W" & AGEIWDATE minus H6B1 > (REINT, SO: 2 YEARS; RECON, RECSO: 4 YEARS): another heart attack since our last interview in [REINT, SO: [P2YEAR] [PYIWDATE=RESPONSE: ([PYIWDATE])] / RECON, RECSO: [P4YEAR]] [PYIWDATE=RESPONSE: ([PYIWDATE])]] / ALL OTHERS: a second or subsequent heart attack since that first one]?
1. Yes 5. No

H7B. How much does this condition limit [your / his / her] normal daily activities? A lot, somewhat, just a little, or not at all?

H7B2. [Are you / Is [HEAD / WIFE/"WIFE"] now taking or carrying medication because of [your / his / her] heart attack?
1. Yes 5. No

H5C. (Has a doctor or other health professional EVER told [you / HEAD / WIFE/"WIFE"] that [you / he / she] had ...)
Coronary heart disease, angina, or congestive heart failure?
1. Yes 5. No

↓

H6C1. How old [were / was] [you / HEAD / WIFE/"WIFE"] when [you / he / she] [were / was] first diagnosed with (this condition / any of these conditions)?
0 – [CURRENT AGE]

H7C. How much does this condition limit [your / his / her] normal daily activities? A lot, somewhat, just a little, or not at all?
H7C2. [Are you / Is [HEAD / WIFE/”WIFE”]] now taking or carrying medication for [your / his / her] coronary heart disease, angina or congestive heart failure?

1. Yes  5. No

H5D. (Has a doctor or other health professional **EVER** told [you / HEAD / WIFE/”WIFE”] that [you / he / she] had ...)

High blood pressure or hypertension?

1. Yes  5. No  → GO TO H5E

↓

H6D1. How old [were / was] [you / HEAD / WIFE/”WIFE”] when [you / he / she] [were / was] first diagnosed with high blood pressure or hypertension?

0 – [CURRENT AGE]

H7D. How much does this condition limit [your / his / her] normal daily activities? A lot, somewhat, just a little, or not at all?


H7D2. [Are you / Is [HEAD / WIFE/”WIFE”]] now taking medication to lower [your / his / her] blood pressure?

1. Yes  5. No

H5E. (Has a doctor or other health professional **EVER** told [you / HEAD / WIFE/”WIFE”] that [you / he / she] had ...)

Asthma?

1. Yes  5. No  → GO TO H5F

↓

H6E1. How old [were / was] [you / HEAD / WIFE/”WIFE”] when [you / he / she] [were / was] first diagnosed with asthma?

0 – [CURRENT AGE]

H7E. How much does this condition limit [your / his / her] normal daily activities? A lot, somewhat, just a little, or not at all?


H7E2. In order to treat or control [your / his / her] asthma, [are you / is [HEAD / WIFE/”WIFE”]] now taking or carrying medication or an inhaler?

1. Yes  5. No

H5F. (Has a doctor or other health professional **EVER** told [you / HEAD / WIFE/”WIFE”] that [you / he / she] had ...)

Chronic lung disease such as bronchitis or emphysema?

1. Yes  5. No  → GO TO H5G

↓

H6F1. How old [were / was] [you / HEAD / WIFE/”WIFE”] when [you / he / she] [were / was] first diagnosed with (lung disease / bronchitis / emphysema)?

0 – [CURRENT AGE]
H7F. How much does this condition limit [your / his / her] normal daily activities? A lot, somewhat, just a little, or not at all?

H7F2. [Are you / Is [HEAD / WIFE/"WIFE"] now taking medication or receiving oxygen or other treatment for [your / his / her] lung condition?
1. Yes  5. No

H5G. (Has a doctor or other health professional EVER told [you / HEAD] / WIFE/"WIFE") that [you / he / she] had …)
Diabetes or high blood sugar?
1. Yes  5. No → GO TO H5H

H6G1. How old [were / was] [you / HEAD / WIFE/"WIFE"] when [you / he / she] [were / was] first diagnosed with diabetes?
0 – [CURRENT AGE]

H7G. How much does this condition limit [your / his / her] normal daily activities? A lot, somewhat, just a little, or not at all?

H7G2. In order to treat or control [your / his / her] diabetes, [are you / is [HEAD / WIFE/"WIFE"] now taking medication that [you / he / she] swallow[s] or using insulin shots or a pump?
1. Yes  5. No

H5H. (Has a doctor or other health professional EVER told [you / HEAD] / WIFE/"WIFE") that [you / he / she] had …)
Arthritis or rheumatism?
1. Yes  5. No → GO TO H5I

H6H1. How old [were / was] [you / HEAD / WIFE/"WIFE"] when [you / he / she] [were / was] first diagnosed with (arthritis / rheumatism)?
0 – [CURRENT AGE]

H7H. How much does this condition limit [your / his / her] normal daily activities? A lot, somewhat, just a little, or not at all?

H7H2. [Are you / Is [HEAD / WIFE/"WIFE"] now taking medication or receiving treatment for [your / his / her] arthritis or rheumatism?
1. Yes  5. No
H5I. (Has a doctor or other health professional \textbf{EVER} told [you / HEAD / WIFE/”WIFE”] that [you / he / she] had ...) Permanent loss of memory or loss of mental ability?

1. Yes 5. No \rightarrow GO TO H5J

\downarrow

H6I. How old [were / was] [you / HEAD / WIFE/”WIFE”] when [you / he / she] [were / was] first diagnosed with (loss of memory / mental ability)?

0 – [CURRENT AGE]

H7I. How much does this condition limit [your / his / her] normal daily activities? A lot, somewhat, just a little, or not at all?


H7I2. [Are you / Is [HEAD / WIFE/”WIFE”]] now taking medication prescribed by a doctor to help with [your / his / her] memory problem?

1. Yes 5. No

H5J. (Has a doctor or other health professional \textbf{EVER} told [you / HEAD / WIFE/”WIFE”] that [you / he / she] had...) A learning disorder?

1. Yes 5. No \rightarrow GO TO HSK

\downarrow

H6J. How old [were / was] [you / HEAD / WIFE/”WIFE”] when [you / he / she] [were / was] first diagnosed with a learning disorder?

0 – [CURRENT AGE]

H7J. How much does this condition limit [your / his / her] normal daily activities? A lot, somewhat, just a little, or not at all?


H7J2. [Are you / Is [HEAD / WIFE/”WIFE”]] now receiving treatment or taking medication to help with [your / his / her] learning disorder?

1. Yes 5. No

H5K. (Has a doctor or other health professional \textbf{EVER} told [you / HEAD / WIFE/”WIFE”] that [you / he / she] had ...) Cancer or a malignant tumor?

1. Yes 5. No \rightarrow GO TO HSL

\downarrow

H6K1. How old [were / was] [you / HEAD / WIFE/”WIFE”] when [you / he / she] [were / was] first diagnosed with cancer?

0 – [CURRENT AGE]

H6K3. [Are you / Is [HEAD / WIFE/”WIFE”]] currently in treatment for [your / his / her] cancer, in remission, or has it been cured?

- \textbf{If R says can’t afford insurance to get treatment, are doing nothing, etc, ENTER: [4]}

H6K4. What type of cancer [do / does] [you / he / she] have? (In what part of [your / his / her] body is it?)
- ENTER all that apply
- PROBE: Any others?
  1. Bladder cancer  
  2. Breast cancer  
  3. Cervical cancer  
  4. Colon cancer  
  5. Lung cancer  
  6. Lymphoma or leukemia  
  7. Ovarian cancer  
  8. Prostate cancer  
  9. Skin cancer, non-melanoma (e.g. basal cell)  
  10. Skin cancer, Melanoma  
  11. Skin cancer, DK type  
  12. Thyroid cancer  
  13. Uterine cancer  

97. Other-specify (H6K4SPEC. Specify (String 100))

H7K. How much does this condition limit [your / his / her] normal daily activities? A lot, somewhat, just a little, or not at all?

H5L. (Has a doctor or other health professional EVER told [you / HEAD / WIFE/"WIFE"] that [you / he / she] had …)
Any emotional, nervous, or psychiatric problems?
1. Yes 5. No → GO TO

H6L1. How old [were / was] [you / HEAD / WIFE/"WIFE"] when [you / he / she] [were / was] first diagnosed?
0 – [CURRENT AGE]

H6L2. What was the diagnosis? What is the emotional / psychiatric disorder?
- ENTER all that apply
- PROBE: Any others?
  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  
  9. PTSD (Post-Traumatic Stress Disorder)  

97. Other-specify (H6L2SPEC. Specify (String 100))

H7L. How much does this condition limit [your / his / her] normal daily activities? A lot, somewhat, just a little, or not at all?

H7L2. [Are you / Is [HEAD / WIFE/"WIFE"]] taking tranquilizers, antidepressants, or pills for nerves?
1. Yes 5. No

H5M. Is there any other serious, chronic condition that a doctor or other health professional EVER told [you / HEAD / WIFE/"WIFE"] that [you / he / she] had?
1. Yes 5. No → GO TO H8

H6M1. What is that condition?

String 500
H6M2. How old [were / was] [you / HEAD / WIFE/”WIFE”] when [you / he / she] [were / was] first diagnosed?

0 – [CURRENT AGE]

H7M. How much does this condition limit [your / his / her] normal daily activities? A lot, somewhat, just a little, or not at all?


H7M2. [Are you / Is [HEAD / WIFE/”WIFE”] now taking medication for this condition?

1. Yes  5. No

H8. [Were / Was] [you / HEAD / WIFE/”WIFE”] a patient in a hospital overnight or longer at any time during [PYEAR]?

1. Yes  5. No → GO TO H9ACKPT

↓

H8A. How many nights [were / was] [you / HEAD / WIFE/”WIFE”] in a hospital altogether in [PYEAR]?

• ENTER amount here, then SELECT unit of time on next screen (Nights, Weeks)

0 – 365 DK/RF → GO TO H9ACKPT

↓

H8A2. The amount entered is: [H8A]

• SELECT the unit of time below

1. Nights  2. Weeks

H9ACKPT. CAI CHECKPOINT: SEE HEALTH STATUS (H1) AND WORK LIMITATION STATUS (H2)

1. H1=EXCELLENT AND H2=NO  5. ALL OTHERS

↓

H9A. The next questions are about [your / HEAD’s / WIFE’s/”WIFE’s”] ability to do certain activities - by [yourself / himself / herself] and without special equipment.
Because of a health or physical problem, [do / does] [you / 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 / Does] [you / he / she] usually use special equipment to do that activity?

1. Yes  5. No
H9B. (Because of a health or physical problem, [do / does] [you / 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 / Does] [you / he / she] usually use special equipment to do that activity?

1. Yes  5. No

H9C. (Because of a health or physical problem, [do / does] [you / 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 / Does] [you / he / she] usually use special equipment to do that activity?

1. Yes  5. No

H9D. (Because of a health or physical problem, [do / does] [you / 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 / Does] [you / he / she] usually use special equipment to do that
H9E. \([H1=EXCELLENT\text{ AND }H2=NO]\): This question is about \([your / HEAD's / WIFE's/"WIFE's"]\) ability to do certain activities - by \([yourself / himself / herself]\) and without special equipment. Because of a health or physical problem, \([do / does\] \([you / HEAD / WIFE/"WIFE"]\) have any difficulty... ALL OTHERS: (Because of a health or physical problem, \([do / does\] \([you / HEAD / WIFE/"WIFE"]\) have any difficulty...) Walking?

| 1. Yes | 5. No | → GO TO H9FCKPT |

H9FCKPT. CAI CHECKPOINT: SEE HEALTH STATUS (H1) AND WORK LIMITATION STATUS (H2)

| 1. H1=EXCELLENT AND H2=NO | → GO TO H11E | 5. ALL OTHERS |

H9F. (Because of a health or physical problem, \([do / does\] \([you / he / she]\) 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 / Does\] \([you / he / she]\) usually use special equipment to do that activity?

| 1. Yes | 5. No |

H9G. (Because of a health or physical problem, \([do / does\] \([you / he / she]\) 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 / Does\] \([you / he / she]\) usually use special equipment to do that
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 / does] [you / HEAD / WIFE/"WIFE"] 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 / Does] [you / HEAD / WIFE/"WIFE"] have any difficulty...)
Shopping for personal 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. [H1=EXCELLENT AND H2=NO: The next questions are about doing other activities by [yourself / himself / herself] and without special equipment.]
([Do / Does] [you / HEAD / WIFE/"WIFE"] 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  

H11GCKPT. CAI CHECKPOINT: SEE HEALTH STATUS (H1) AND WORK LIMITATION STATUS (H2)

1. H1=EXCELLENT AND H2=NO  →  GO TO H11J  5. ALL OTHERS  

H11G. ([Do / Does] [you / HEAD / WIFE/"WIFE"] 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 / Does] [you / HEAD / WIFE/"WIFE"] 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  

H11LCKPT. CAI CHECKPOINT: SEE HEALTH STATUS (H1) AND WORK LIMITATION STATUS (H2)

1. H1=EXCELLENT AND H2=NO  →  GO TO H12A  5. ALL OTHERS  

H11L. ([Do / Does] [you / HEAD / WIFE/"WIFE"] 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. The next questions are about physical activities (exercise, sports, physically active hobbies...) that [you / HEAD / WIFE/"WIFE"] may do in [your / his / her] leisure time.

(In [your / HEAD’s / WIFE’s/"WIFE’s"] leisure time,) how often [do / does] [you / HEAD / WIFE/"WIFE"] do Vigorous activities for at least 10 minutes that cause heavy sweating or large increases in breathing or heart rate?

- ENTER amount here, then SELECT unit of time on next screen (Day, Week, Two weeks, Month, Year)

0 → GO TO H12B 1−100 DK/RF → GO TO H12B

↓

H12APER. The amount entered is: [H12A] per

- SELECT the unit of time below


7. Other-specify (H12APERSPEC. Specify. (String 100))

H12B. (In [your / HEAD’s / WIFE’s/"WIFE’s"] leisure time,...)

(How often [do / does] [you / HEAD / WIFE/"WIFE"] 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?

- ENTER amount here, then SELECT unit of time on next screen (Day, Week, Two weeks, Month, Year)

0 → GO TO H12C 1−100 DK/RF → GO TO H12C

↓

H12BPER. The amount entered is: [H12B] per

- SELECT the unit of time below


7. Other-specify (H12BPERSPEC. Specify. (String 100))

H12C. (In [your / HEAD’s / WIFE’s/"WIFE’s"] leisure time,...)

(How often [do / does] [you / HEAD / WIFE/"WIFE"] do) physical activities specifically designed to strengthen [your / his / her] muscles such as lifting weights?

- ENTER amount here, then SELECT unit of time on next screen (Day, Week, Two weeks, Month, Year)

0 → GO TO H13 1−100 DK/RF → GO TO H13

↓

H12CPER. The amount entered is: [H12C] per

- SELECT the unit of time below


7. Other-specify (H12CPERSPEC. Specify. (String 100))
H13. [Do / Does] [you / HEAD / WIFE/"WIFE"] smoke cigarettes?
   1. Yes  5. No  → GO TO H16

H14. On average, how many cigarettes per day [do / does] [you / he / she] usually smoke?
   • DEFINITION: A standard pack of American cigarettes contains 20 cigarettes
   0 – 200

H15. How old [were / was] [you / HEAD / WIFE/"WIFE"] when [you / he / she] first smoked cigarettes regularly?
   1 – [CURRENT AGE]
   GO TO H20

H16. Did [you / HEAD / WIFE/"WIFE"] ever smoke cigarettes?
   1. Yes  5. No  → GO TO H20

H17. On average, how many cigarettes per day did [you / he / she] smoke?
   • DEFINITION: A standard pack of American cigarettes contains 20 cigarettes
   0 – 200

H18. How old [were / was] [you / HEAD / WIFE/"WIFE"] when [you / he / she] last smoked cigarettes regularly?
   1 – [CURRENT AGE]

H19. How old [were / was] [you / HEAD / WIFE/"WIFE"] when [you / he / she] first smoked cigarettes regularly?
   1 – [CURRENT AGE (H18)]

H20. [Do / Does] [you / HEAD / WIFE/"WIFE"] ever drink any alcoholic beverages such as beer, wine, or liquor?
   1. Yes  5. No  → GO TO H22

H21A. In the last year, on average, how often did [you / HEAD / WIFE/"WIFE"] 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?
   • If R says “Did not drink in the last year”, ENTER [1]
   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
   DK/RF
   → GO TO H22

H21B. In the last year, on the days [you / he / she] drank, about how many drinks did [you / he / she] have?
   • If R says “Did not drink in the last year”, ENTER [0]
   0 – 25
H21C. In the last year, on how many days have you had MALE: five or more drinks on one occasion? or more drinks on one occasion?
- ENTER [0] for None

0 – 365

H22. About how much [do / does] you weigh?
- ENTER weight in pounds or press [Enter] to continue to next screen for kilograms
- If more than 400 pounds, ENTER [400]

[Enter] 50 – 400 DK/RF
↓ GO TO H23FT

H22KILO. (About how much [do / does] you weigh?)
- ENTER weight in kilograms
- If more than 180 kilograms, ENTER [180]

36.0 – 180.0

H23FT. How tall are you?
- ENTER height in feet and inches or press [Enter] to continue to next screen for meters

[H23FT] feet and ___ inches

[Enter] 2 – 7 DK/RF → GO TO H24CKPT

↓

H23METER. (How tall are you?)
- ENTER height in meters

0.60 – 2.10

H23IN. (How tall are you?)
- [H23FT] feet and ___ inches

0 – 11

H24CKPT. CAI CHECKPOINT: WHETHER WIFE/"WIFE" IN FU (CYFUHU=1, 4 & CYAQRTH=202, 222)

1. WIFE/"WIFE" IN FU → REPEAT H1-H23 FOR WIFE/"WIFE"; THEN GO TO H25 RULE
5. ALL OTHERS

Childhood Health
LOOP 1 R/HEAD
LOOP 2 SPOUSE/PARTNER WIFE/"WIFE"

H25 RULE: WHETHER RESPONDENT IS HEAD/WIFE/"WIFE" (RESPONDENT=1, 2, 3) OR OFUM/PROXY (RESPONDENT=4, 7) ; WHETHER SELF, PROXY-BY-SPOUSE OR PROXY-BY-OTHER REPORT(S) COLLECTED IN 2007, 2009, 2011

R = HEAD/WIFE/"WIFE"

SELF-REPORT NOT COLLECTED FOR R
(CHREPORT=0, 2, 3, 6)
↓ GO TO H47 RULE

SELF-REPORT COLLECTED FOR R
(CHREPORT=1, 4, 5, 7)

PROXY REPORTS NOT COLLECTED FOR HEAD
(CHREPORT=0, 1)

ANY PROXY REPORT COLLECTED FOR HEAD
(CHREPORT=2, 3, 4, 5, 6, 7)

R = OFUM/PROXY

GO TO H47 RULE

HEALTHAQSN. AQSN OF HEAD/WIFE/"WIFE"
REPORTAQSN. AQSN OF RESPONDENT
H25_INTRO. These next questions ask about [your / R’s/HEAD’s / SPOUSE’s/WIFE’s/"WIFE’s"] health during childhood, that is, before age 17. [R=OFUM/PROXY: I understand that it may be difficult for you to answer these questions, but please do your best.]
• ENTER [1] to continue
  1. Continue

H25. Consider [your / R’s/HEAD’s / SPOUSE’s/WIFE’s/"WIFE’s"] health while [you / he / she] [were / was] growing up, before [you / he / she] [were / was] 17 years old. Would you say that [your / his / her] health during that time was excellent, very good, good, fair or poor?


H26 (H1D). When [you / he / she] [were / was] growing up, before [you / he / she] [were / was] 17 years old, did [you / he / she] miss a month or more of school because of a health problem?

1. Yes  5. No

H27. Before you were 17 years old, did you have any of the following childhood diseases:
Measles?

1. Yes  5. No

H28. (Before [you / he / she] [were / was] 17 years old, did [you / he / she] have...)
Mumps?

1. Yes  5. No

H29. (Before [you / he / she] [were / was] 17 years old, did [you / he / she] have...)
Chicken pox?

1. Yes  5. No

H30. (Before [you / he / she] [were / was] 17 years old, did [you / he / she] have...)
Difficulty seeing, even with eye glasses or prescription lenses?

1. Yes  5. No

H31. Did one or both of [your / his / her] parents or guardians smoke during [your / his / her] childhood? If Yes: Was that one or both of them?

1. Yes, one of them  2. Yes, both of them  5. No, none of them

H32. Before [you / he / she] [were / was] 17 years old, did [you / he / she] have any of the following childhood diseases:
Asthma?

1. Yes  5. No

H33. (Before [you / he / she] [were / was] 17 years old, did [you / he / she] have...)
Diabetes?

1. Yes  5. No

H34. (Before [you / he / she] [were / was] 17 years old, did [you / he / she] have...)
A respiratory disorder such as bronchitis, wheezing, hay fever, shortness of breath, or sinus infection?
1. Yes  5. No

H35. (Before [you / he / she] [were / was] 17 years old, did [you / he / she] have...) A speech impairment?
   1. Yes  5. No

H36. (Before [you / he / she] [were / was] 17 years old, did [you / he / she] have...) An allergic condition?
   1. Yes  5. No

H37. (Before [you / he / she] [were / was] 17 years old, did [you / he / she] have...) Heart trouble?
   1. Yes  5. No

H38. (Before [you / he / she] [were / was] 17 years old, did [you / he / she] have...) Chronic ear problems or infections?
   1. Yes  5. No

H39. Before [you / he / she] [were / was] 17 years old, did [you / he / she] have any of the following childhood diseases:
   Epilepsy or seizures?
   1. Yes  5. No

H40. (Before [you / he / she] [were / was] 17 years old, did [you / he / she] have...) Severe headaches or migraines?
   1. Yes  5. No

H41. (Before [you / he / she] [were / was] 17 years old, did [you / he / she] have...) Stomach problems?
   1. Yes  5. No

H42. (Before [you / he / she] [were / was] 17 years old, did [you / he / she] have...) High blood pressure?
   1. Yes  5. No

H43. (Before [you / he / she] [were / was] 17 years old, did [you / he / she] have...) Depression?
   1. Yes  5. No

H44. (Before [you / he / she] [were / was] 17 years old, did [you / he / she] have...) Drug or alcohol problems?
   1. Yes  5. No

H45. (Before [you / he / she] [were / was] 17 years old, did [you / he / she] have...) Any other emotional or psychological problems?
1. Yes  5. No

H46 RULE: WHETHER ANY HEALTH CONDITIONS ENDORED FOR R/HEAD OR SPOUSE/W/"W" (AT LEAST ONE H32-H45=YES)

AT LEAST ONE CONDITION ENDORED    ALL OTHERS → GO TO H47 RULE

Begin Health EHC Block
CALAQN. AQS OF HEAD/WIFE/"WIFE"

CAL_INTRO. We would like to know more about how old [you / R / HEAD / SPOUSE / WIFE/"WIFE"] [were / was] when [you / he / she] had the health condition(s) we just talked about, but first I want to ask you about some other things that may have happened in [your / his / her] childhood.

- ENTER [1] to continue

1. Continue

Landmarks Timeline

Person: [CYNAMF CYNAML, CYAQRTH], Age: [AGEIWDATE], DOB: [CY(MO/DY/YR)BRN]

PARENTSEPEHC[0-16]. If [your / R's/HEAD's / SPOUSE's/WIFE's/"WIFE's"] parents or guardians separated during [your / his / her] childhood, please tell me how old [you / he / she] [were / was] at the time of each separation, starting with the first time they separated. Any other separations?

MOVEEHC[0-16]. If [you / R / HEAD / SPOUSE / WIFE/"WIFE"] moved during [your / his / her] childhood, please tell me how old [you / he / she] [were / was] at the time of each move, starting with the first move. Any other moves?

SCHOOLEHC[0-16]. At what age did [you / R / HEAD / SPOUSE / WIFE/"WIFE"] first start going to school? If [you / he / she] changed schools during [your / his / her] childhood, please tell me how old [you / he / she] [were / was] each time, starting with the first time. Any other school changes?

AGE CELLS

0  1  2  3  4  5  6  7  8  9  10  11  12  13  14  15  16

RESPONSES  Yes (1)  Cancel (0)

HEALTH EHC RULE: WHICH CONDITIONS ENDORED – WHICH QUESTIONS ASKED

<table>
<thead>
<tr>
<th>H32=YES</th>
<th>ASK ASTHMA</th>
<th>H33=YES</th>
<th>ASK DIABETES</th>
<th>H34=YES</th>
<th>ASK RESPDISORDER</th>
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</thead>
<tbody>
<tr>
<td>H35=YES</td>
<td>ASK SPEECHIMPAIR</td>
<td>H36=YES</td>
<td>ASK ALLERGY</td>
<td>H37=YES</td>
<td>ASK HEARTTROUBLE</td>
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<tr>
<td>H38=YES</td>
<td>ASK EARPROBLEMS</td>
<td>H39=YES</td>
<td>ASK EPILEPSY</td>
<td>H40=YES</td>
<td>ASK HEADACHES</td>
</tr>
<tr>
<td>H41=YES</td>
<td>ASK STOMACHPROB</td>
<td>H42=YES</td>
<td>ASK HIGHPB</td>
<td>H43=YES</td>
<td>ASK DEPRESSION</td>
</tr>
<tr>
<td>H44=YES</td>
<td>ASK DRUGALCOHOL</td>
<td>H45=YES</td>
<td>ASK OTHERPROB</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Health Conditions Timeline

Person: [CYNAMF CYNAML, CYAQRTH], Age: [AGEIWDATE], DOB: [CY(MO/DY/YR)BRN]

At what age did [you / R / HEAD / SPOUSE / WIFE/“WIFE”] first have [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 / any other emotional or psychological problems]? Until what age did [you / he / she] have it?

- PROBE for all ages 0-16 at which condition occurred
- IF R SAYS "Did not have that condition", CLICK any cell - SELECT Denial - then ENTER NOTE
- 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

For age at which condition ended:

- IF R SAYS “Older than 16”, CLICK 17+ - SELECT Yes - ENTER Age
- IF R SAYS “Still have it”, CLICK 17+ - SELECT Yes - SELECT Still Have It

<table>
<thead>
<tr>
<th>RESPONSES</th>
<th>0</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
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</table>

<table>
<thead>
<tr>
<th>RESPONSES</th>
<th>17+</th>
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<tbody>
<tr>
<td><em>enter_age</em></td>
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</tbody>
</table>

H47 RULE: WHETHER WIFE/“WIFE” IN FU (CYFUHU=1, 4 & CYAQRTH=202, 222)

1. WIFE/“WIFE” IN FU
5. ALL OTHERS
→ GO TO H48CKPT
H47A RULE: WHETHER RESPONDENT IS HEAD/WIFE/"WIFE" (RESPONDENT=1, 2, 3) OR OFUM/PROXY (RESPONDENT=4, 7); WHETHER PROXY-BY-SPOUSE OR PROXY-BY-OTHER REPORT(S) COLLECTED IN 2007, 2009, 2011

<table>
<thead>
<tr>
<th>R = HEAD/WIFE/&quot;WIFE&quot;</th>
<th>R = OFUM/PROXY</th>
</tr>
</thead>
<tbody>
<tr>
<td>PROXY-BY-SPOUSE REPORT NOT COLLECTED FOR SPOUSE (CHREPORT=0, 1, 3, 5)</td>
<td>PROXY REPORTS NOT COLLECTED FOR WIFE/&quot;WIFE&quot; (CHREPORT=0, 1)</td>
</tr>
<tr>
<td>REPEAT CHILDHOOD HEALTH FOR S/P; THEN GO TO H48CKPT</td>
<td>REPEAT CHILDHOOD HEALTH FOR W/&quot;W&quot;; THEN GO TO H48CKPT</td>
</tr>
</tbody>
</table>

End Health EHC Block

H48CKPT. CAI CHECKPOINT: WHETHER THERE ARE OFUMS IN THE FU (CYFUHU=1, 4 & CYAQRTH>222)

1. OFUM IN FU 5. ALL OTHERS → GO TO H58 RULE

H49. Now about the rest of [R=FU MEMBER: your / R=PROXY: the] family living there — are any family members in poor health?

1. Yes 5. No → GO TO H58 RULE

H50. Who is that?

- ENTER all that apply
- PROBE: Any others?

1 – 24. [CYNAMF CYNAML, CYAQRTH, CYFUHU] AQSND list of OFUMs w/FUHU=FU, FUMI

H58 RULE: WHETHER RESPONDENT IS HEAD OR WIFE/"WIFE" (RESPONDENT=1, 2, 3)

R = HEAD/WIFE/"WIFE" ALL OTHERS → GO TO H61D2

H59A. Now, I am going to ask you (Respondent: [CYNAMF CYNAML]) 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...

So sad nothing could cheer you up?

1. All of the time 2. Most of the time 3. Some of the time 4. A little of the time 5. None of the time

H59B. (In the past 30 days, about how often did you feel...) Nervous?

(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?)

1. All of the time 2. Most of the time 3. Some of the time 4. A little of the time 5. None of the time
H59C. (In the past 30 days, about how often did you feel...)
Restless or fidgety?
(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?)
1. All of the time 2. Most of the time 3. Some of the time 4. A little of the time 5. None of the time

H59D. (In the past 30 days, about how often did you feel...)
Hopeless?
(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?)
1. All of the time 2. Most of the time 3. Some of the time 4. A little of the time 5. None of the time

H59E. (In the past 30 days, about how often did you feel...)
That everything was an effort?
(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?)
1. All of the time 2. Most of the time 3. Some of the time 4. A little of the time 5. None of the time

H59F. (In the past 30 days, about how often did you feel...)
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?)
1. All of the time 2. Most of the time 3. Some of the time 4. A little of the time 5. None of the time

H59G RULE: WHETHER R ENDORSED ONE OR MORE FEELINGS IN PAST 30 DAYS (ANY H59A-H59F=1, 2, 3, 4)

AT LEAST ONE FEELING ENDORSED ALL OTHERS → GO H61D2

H59J. How much do these feelings usually interfere with your life or activities - a lot, some, a little, or not at all?
1. A lot 2. Some 3. A little 5. Not at all

H61D2. Next, please think about health insurance. Including health insurance obtained through employment, or purchased directly or through a government program like Medicare and Medicaid that provide medical care or help pay medical bills, does anyone in [R=FU MEMBER: your / R=PROXY: the] family living there currently have health insurance or health care coverage?
1. Yes 5. No → GO TO H61K

H61D3. Who is covered?
- ENTER all that apply
- PROBE: Any others?
1 – 24. [CYNAMF CYNAML, CYAQRTH, CYFUHU] AQSN list of FU Members w/FUHU=FU, FUMI

H61D4CKPT. NUMBER OF FU MEMBERS WITH HEALTH INSURANCE (H61D3)
1. ONLY ONE FU MEMBER SELECTED → GO TO H61E RULE 5. ALL OTHERS ↓
H61D4. Does everyone have the same kind of health insurance or health care coverage?

**FU Members With Health Care Coverage/Insurance: [H61D3 selections]**

1. Yes → GO TO H61E  
5. No  

**H61E RULE: FU MEMBERS WITH HEALTH INSURANCE (H61D3)**

**FU MEMBER SELECTED AT H61D3 → ALL OTHERS → GO TO NEXT FU MEMBER**

**H61E. [H61D4<>YES: CYNAMF CYNAML, CYAQRTH, CYFUHU]**

1st ITERATION:

What kind of health insurance or health care coverage [H61D4=YES: is that / ALL OTHERS: [do / does] [you / CYNAMF] have?  

**ALL OTHER ITERATIONS:**

What about [you / CYNAMF] (what kind of health insurance or health care coverage [do / does] [you / CYNAMF] have)?

- 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?
- ENTER all that apply  
- PROBE: Any others?

1. Employer provided health insurance (Current or former employer)  
2. Private health insurance purchased  
3. Medicare  
4. Medi-Gap/Supplemental  
5. Medicaid/[STATEMEDPROG]/[SCHIPNAME]  
6. Military Health Care/Tricare (Active duty)  
7. Tricare/Champus/ChampVA (Dependents, veterans)  
8. Indian Health Insurance  
9. Other-plan  
10. Other-health  
11. VA (Veterans' Administration)

**H61E SOFT CHECK: IF MEDICARE OR MEDICAID NOT SELECTED AT H61E:**

**IWER: READ QUESTION TO VERIFY MEDICARE AND/OR MEDICAID COVERAGE:**

How about [Medicare] [,] [and] [Medicaid] [,] [PYSTATTERESIDE<>FC/DK/RF: [STATEMEDPROG] and [SCHIPNAME]]?

([H61D4=YES: Does your family / ALL OTHERS: [Do you / Does [CYNAMF]] have (this / any of these)?]

IF Yes .............ENTER [Close] or [Goto] to make Medicare / Medicaid selection(s)

IF No, Dk, Rf......ENTER [Suppress] to go forward with interview

**H61ESPEC RULE:**

**H61ESPEC. [H61D4<>YES: CYNAMF CYNAML, CYAQRTH, CYFUHU]**

Could you tell me a little more about that other plan or program?

Health Plan(s) Selected: [H61E selections]

**String 100**
H61E2CKPT. WHETHER ALL FU MEMBERS HAVE SAME COVERAGE (H61D4); WHETHER THIS FU MEMBER IS YOUNGER THAN 19 YEARS OLD (AGEIWDATE<19)

1. H61D4<>YES AND FU MEMBER<19 YRS OLD  5. ALL OTHERS  → GO TO H61F

H61E2.  [H61D4<>YES: CYNAMF CYNAML, CYAQRTH, CYFUHU]

Interviewer Checkpoint:
- Is that [STATE SCHIP PROGRAM NAME], the state health insurance plan for uninsured children?
- ENTER Yes or No; ASK R only if you are unclear about the answer

Health Plan(s) Selected: [H61E selections]

1. Yes  5. No

H61E = Employer Provided Health Insurance

H61F.  [H61D4<>YES: CYNAMF CYNAML, CYAQRTH, CYFUHU]

Whose employer provides [H61D4=YES: this / ALL OTHERS: [your / CYNAMF’s]] health insurance?
- ENTER all that apply, maximum of 3 selections
- PROBE: Any others?

Health Plan(s) Selected: [H61E selections]

1 – 24. [CYNAMF CYNAML, CYAQRTH, CYFUHU]  AQSN list of FU Members w/FUHU=FU, FUMI

25. Parent of [FU MEMBER], outside of FU

97. Other person outside of FU-specify (H61FSPEC. Specify (String 100))

H61E = Private Health Insurance

H61G.  [H61D4<>YES: CYNAMF CYNAML, CYAQRTH, CYFUHU]

Who is the policy holder on [H61D4=YES: this / ALL OTHERS: [your / CYNAMF’s]] private health insurance?
- IF needed: The policy holder is the person who purchased the insurance; other family members who are covered are called dependents.
- ENTER all that apply, maximum of 3 selections
- PROBE: Any others?

Health Plan(s) Selected: [H61E selections]

1 – 24. [CYNAMF CYNAML, CYAQRTH, CYFUHU]  AQSN list of FU Members w/FUHU=FU, FUMI

25. Parent of [FU MEMBER], outside of FU

97. Other person outside of FU-specify (H61GSPEC. Specify (String 100))

H61H RULE: WHETHER ALL FU MEMBERS HAVE SAME COVERAGE (H61D4); WHETHER MORE FU MEMBERS WITH HEALTH COVERAGE (H61D3)

H61D4<>YES & MORE FU MEMBERS  → REPEAT H61E-H61G; MAX=24;  ALL OTHERS  → H61JCKPT

H61JCKPT. WHETHER ANY FU MEMBER HAS EMPLOYER PROVIDED OR PRIVATELY PURCHASED INSURANCE (H61E=1, 2)

1. EMPLOYER PROVIDED  2. PRIVATELY PURCHASED  5. ALL OTHERS  → GO TO H61K
H61J. How much are \([R=FU \text{ MEMBER}: \text{your \[CYEAR \text{ FU COUNT}>1\] and your family’s}] / R=PROXY: \text{their}] \text{health insurance premiums \[CYEAR \text{ FU COUNT}>1\]: altogether]? Please only include amounts that \([R=FU \text{ MEMBER}: \text{you \[CYEAR \text{ FU COUNT}>1\] and your family}] / R=PROXY: \text{they}] \text{paid, either directly or through automatic deductions from pay. Do not include amounts paid by someone outside of \[R=FU \text{ MEMBER}: \text{your}] / R=PROXY: \text{their}] \text{family.}}

- \text{ENTER amount here, then SELECT unit of time on next screen (Quarterly, Month, Year)}

\$1 – 99,997 \[\text{DK/RF}\] → GO TO H61JA

\[\downarrow\]

H61JPER. \text{The amount entered is: [H61J] per \_}\[\_\]_

- \text{SELECT the unit of time below}

4. Quarterly 5. Month 6. Year 7. Other-specify (H61JPERSPEC. Specify. (String 100))

GO TO H61K

\[\text{H61JA. Were they}$2,500 \text{or more?}\]

\[\downarrow\]

\[\text{H61JB.}$5,000 \text{ or more?}\]

\[\downarrow\]

\[\text{H61JC.}$1,000 \text{ or more?}\]

\[\text{GO TO H61K}\]

\[\text{GO TO H61K}\]

H61K. Did \([R=FU \text{ MEMBER}: \text{you}] / R=PROXY: \text{HEAD}] \[CYEAR \text{ FU COUNT}>1\]: or anyone else in the family living there] go without health insurance at any time during \[P2YEAR\] or \[PYEAR\]?

\[\downarrow\]

H61L. \text{Who was that?}

- \text{ENTER all that apply}

- \text{PROBE: Any others?}

\[1 – 24. \text{[CYNAMF CYNAML, CYAQRTH, CYFUHU]}\] \text{AQSN list of FU Members w/FUHU=FU, FUMI and birth year is before CYEAR}

H61M RULE: WHETHER THIS FU MEMBER WAS BORN BY P2YEAR

\[\text{BIRTH YEAR } \leq \text{ P2YEAR } \quad \text{ALL OTHERS} \quad \rightarrow \text{GO H61N RULE}\]

\[\downarrow\]

H61M. \text{[CYNAMF CYNAML, CYAQRTH, CYFUHU]}

\text{For how many months in \[P2YEAR\] [were / was] \[you / CYNAMF] uninsured?}

\[0 – 12\]

H61N RULE: WHETHER THIS FU MEMBER WAS BORN BY PYEAR

\[\text{BIRTH YEAR } \leq \text{ PYEAR } \quad \text{ALL OTHERS} \quad \rightarrow \text{GO H61END RULE}\]
H61N. **[CYNAMF CYNAML, CYAQRTH, CYFUHU]**

(For how many months in **[PYEAR]** ([were / was] [you / CYNAMF] uninsured)?

0 – 12

**H61END RULE: WHETHER MORE FU MEMBERS WERE UNINSURED (H61L)**

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<thead>
<tr>
<th>MORE FU MEMBERS</th>
<th>NO MORE FU MEMBERS</th>
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<tbody>
<tr>
<td>REPEAT H61M - H61N; MAX=24; THEN GO TO H62CKPT</td>
<td>↓</td>
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</tbody>
</table>

**H62CKPT. CAI CHECKPOINT: WHETHER RESPONDENT IS HEAD/WIFE/“WIFE” (RESPONDENT=1, 2, 3); WHETHER VALID MEDICARE# ALREADY COLLECTED FOR R IN PREVIOUS WAVE (MEDICARENUM=1); WHETHER R IS AGE 65 OR OLDER (AGEIWDATE≥65) OR R IS COVERED BY MEDICARE (H61E=3 FOR RESPONDENT, OR H61D4=YES & H61E[1]=3)**

<table>
<thead>
<tr>
<th>R = HEAD OR WIFE/“WIFE”</th>
<th>5. ALL OTHERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. VALID NUMBER COLLECTED</td>
<td>MEDICARE NOT COLLECTED OR NOT VALID</td>
</tr>
<tr>
<td>GO TO H64</td>
<td>GO TO H64</td>
</tr>
<tr>
<td>3. R = 65+ YRS OLD</td>
<td>4. R HAS MEDICARE</td>
</tr>
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</table>

**H62A.** We would like to learn more about people’s health and how health care is used. The best place to get this information is Medicare. We are therefore asking FES families to let us access these records. **[NO CHRONIC CONDITIONS ENDORSED (H5): Even if you don’t have any health conditions, it is important for statistical purposes to get this information from Medicare.]**

Under the Privacy Act of 1974, providing your number is a voluntary decision. The benefits you may be receiving under Medicare will not be affected in any way by your decision.

Could you tell me your Medicare number for this purpose?

1. Yes 5. No → GO TO H64

**H62B.** Is that a Medicare Claim number or a Railroad Retirement Board Claim number?

1. Medicare Claim Number 2. Railroad Retirement 3. DK/RF → GO TO H64

**H62C.** What is your complete Medicare number, including the letters or number at the end?

- ENTER the 9-digit Medicare number, then any letter(s) and number(s) at the end

1 2 3 4 5 6 7 8 9 A 1/B 2/C

**H62D.** Is that a 9-digit or 6-digit number?

- 1. 9-digit
- 2. 6-digit

**H62E.** What is your complete Railroad Retirement number including the letter(s) at the beginning?

- ENTER up to 3 letter(s) at the beginning and then the 9-digit number
- If there are less than 3 letter(s), press the space bar to enter blank(s). then ENTER the letter(s)

A B C 1 2 3 4 5 6 7 8 9

**H62F.** What is your complete Railroad Retirement number including the letter(s) at the beginning?

- ENTER up to 3 letter(s) at the beginning and then the 6-digit number
- If there are less than 3 letter(s), press the space bar to enter blank(s). then ENTER the letter(s)

A B C 1 2 3 4 5 6
H64. These next questions are about health care expenditures that \[R=FU\] \[MEMBER\]: you \[CYEAR\] \[FU COUNT>1\]: and your family / \[R=PROXY\]: they] may have had during \[PYEAR\]. About how much did \[R=FU\] \[MEMBER\]: you \[CYEAR\] \[FU COUNT>1\]: and your family / \[R=PROXY\]: they] pay out-of-pocket for nursing home and hospital bills in \[PYEAR\]?

$0 – 999,997 → GO TO H70 DK/RF

H65. Would it amount to $1,000 or more?

1. Yes 5. No DK/RF

↓

H66. $2,000 or more?

1. Yes 5. No DK/RF

↓ GO TO H70

H69. $500 or more?

1. Yes 5. No DK/RF

↓

H67. $8,000 or more?

1. Yes 5. No DK/RF

↓ GO TO H70

H68. $25,000 or more?

1. Yes 5. No DK/RF

↓

H70. About how much did \[R=FU\] \[MEMBER\]: you \[CYEAR\] \[FU COUNT>1\]: and your family / \[R=PROXY\]: they] pay out-of-pocket for doctor, outpatient surgery, and dental bills in \[PYEAR\]?

$0 – 999,997 → GO TO H76 DK/RF

H71. Would it amount to $1,000 or more?

1. Yes 5. No DK/RF → GO TO H76

↓

H72. $2,500 or more? H74. $500 or more?

1. Yes 5. No DK/RF 1. Yes 5. No DK/RF

↓ GO TO H76 GO TO H76 ↓ GO TO H76

H73. $10,000 or more? H75. $250 or more?

1. Yes 5. No DK/RF 1. Yes DK/RF 5. No

↓
H76. About how much did [R=FU MEMBER: you [CYEAR FU COUNT>1: and your family] / R=PROXY: they] pay out-of-pocket for prescriptions, in-home medical care, special facilities, and other services in [PYEAR]?

$0 – 999,997 → GO TO SECTION J

H77. Would it amount to $500 or more?

1. Yes  5. No  DK/RF → GO TO SECTION J

H78. $2,500 or more?

1. Yes  5. No  DK/RF → GO TO SECTION J

H79. $10,000 or more?

1. Yes  5. No  DK/RF → GO TO SECTION J

H81. $200 or more?

1. Yes  5. No  DK/RF → GO TO SECTION J
THE BIG TRICK HERE IS TO PROPERLY IDENTIFY PEOPLE WHOSE MARRIAGE AND KID HISTORIES SHOULD BE ASKED. THE J1 RULE BELOW IDENTIFIES 3 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. H/W/"W" WHO WERE H/W/"W" 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 H/W/"W" 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 FOR PEOPLE NEW TO H/W/"W" - 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") IF WIFE IS AGE 44 OR UNDER. 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 OFUMS AGED 15 - 44 GET SECTION J, AND FEMALE H/W/"W" WHO QUALIFY FOR UPDATES ARE ASKED ABOUT KIDS ONLY IF THEY ARE AGED 44 OR UNDER.

J1CKPT. SECTION J QUALIFIER

<table>
<thead>
<tr>
<th>GROUP 1 - REINTERVIEW or SPLITOFF ONLY</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAME HEAD+WIFE COUPLE AS LAST WAVE. Both Head (CYAQRTH=101 &amp; PYAQRTH=101) and Wife (CYAQRTH=202 &amp; PYAQRTH=202) ARE PYFUHU=FU &amp; CYFUHU=FU, FUMI AND AGEIWDATE&lt;&gt;DK/RF.</td>
</tr>
<tr>
<td>1. TypeA</td>
</tr>
<tr>
<td>2. TypeANOJ</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>GROUP 2 - REINTERVIEW or SPLITOFF ONLY</th>
</tr>
</thead>
<tbody>
<tr>
<td>H/W/&quot;W&quot; WAS H/W/&quot;W&quot; IN ANY COMBINATION LAST WAVE. H/W/&quot;W&quot; is PYAQRTH=101-222 &amp; CYAQRTH=101-222 &amp; PYFUHU=FU &amp; CYFUHU=FU,FUMI</td>
</tr>
<tr>
<td>3. TypeB1</td>
</tr>
<tr>
<td>4. TypeB2</td>
</tr>
<tr>
<td>5. TypeB3</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>GROUP 3 - ALL INTERVIEW TYPES</th>
</tr>
</thead>
<tbody>
<tr>
<td>NEW OR PY INST MALE HEAD: CYAQRTH=101 &amp; PYAQRTH=Empty,&gt;222 &amp; CYFUHU=FU,FUMI &amp; PYFUHU=Empty,Inst.</td>
</tr>
<tr>
<td>6. TypeC1a</td>
</tr>
<tr>
<td>11. TypeC2a</td>
</tr>
<tr>
<td>7. TypeC1b</td>
</tr>
<tr>
<td>12. TypeC2b</td>
</tr>
<tr>
<td>10. TypeC1NoJ</td>
</tr>
</tbody>
</table>

GO TO ALL MARRS IF MARITAL<>NEVMARR; GO TO KIDS NO SECTION J FOR THIS PERSON
J1A. [FIRST ITERATION OF SECTION J]: Now I have some questions about marriage and children.

- ENTER [1] to continue

  1. Continue

**Marriage Update**
J2. AQS OF FU MEMBER

**J3CKPT. CAI CHECKPOINT: FU MEMBER MARITAL STATUS (MARITAL=3, 5, 4, 1, 2)**

<table>
<thead>
<tr>
<th>1. WIDOWED</th>
<th>2. SEPARATED, MARRIED &quot;WIFE&quot;</th>
<th>3. DIVORCED, ANNULMENT</th>
<th>4. MARRIED HEAD, WIFE, OFUM</th>
<th>5. NEVER MARRIED</th>
</tr>
</thead>
<tbody>
<tr>
<td>↓</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GO TO J6MO</td>
<td>GO TO J5MO</td>
<td>GO TO J7MO</td>
<td>GO TO J27CKPT</td>
<td></td>
</tr>
</tbody>
</table>

**J4MO. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]**

In what month and year were you widowed?

- SELECT Month and [Enter] to go to next screen for year
- IF NECESSARY: What would be your best estimate?

|----------------|---------------|---------------|---------------|---------------|---------------|

**J4YR. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]**

The month entered is: [J4MO]

- ENTER the year below

1901 - [CYEAR] Actual year
9996   [P2YEAR] – [CYEAR], DK which year
9997   Before [P2YEAR], DK exact year

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO J27CKPT</td>
<td></td>
<td></td>
<td>GO TO J7MO</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>GO TO J27CKPT</td>
</tr>
</tbody>
</table>

**J5MO. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]**

In what month and year did divorce / annulment become final?

- SELECT Month and [Enter] to go to next screen for year
- IF NECESSARY: What would be your best estimate?

|----------------|---------------|---------------|---------------|---------------|---------------|
J5YR. [CYAQRTH, CYNAMF CYNAML, age: AGEI] 
The month entered is: [J5MO] 
- ENTER the year below 
  1901- [CYEAR] Actual year 
  9996 [P2YEAR]-[CYEAR], DK which year 
  9997 Before [P2YEAR], DK exact year 

|------------------|-------------------|------------------------------------------|--------------------------------------|

GO TO J27CKPT ↓ GO TO J27CKPT

J6YR. [CYAQRTH, CYNAMF CYNAML, age: AGEI] 
In what month and year did [you and your wife / you and your husband / HEAD and his wife / WIFE/“WIFE” and her husband] stop living together? 
- SELECT Month and [Enter] to go to next screen for year 
- IF NECESSARY: What would be your best estimate? 

|------------|-------------|----------|----------|--------|--------|

GO TO J27CKPT ↓ GO TO J27CKPT

J7YR. [CYAQRTH, CYNAMF CYNAML, age: AGEI] 
[Please tell me again, in / In] what month and year did [you / HEAD / you and your wife / you and HEAD / HEAD and his wife / WIFE/“WIFE” and her husband/you and your husband] [last / (last)] get married? 
- SELECT Month and [Enter] to go to next screen for year 
- IF NECESSARY: What would be your best estimate? 

|------------|-------------|----------|----------|--------|--------|

GO TO J27CKPT ↓ GO TO J27CKPT
J8. **[CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]**
What (was / is) [your wife’s / his wife’s / your husband’s / her husband’s] name?
- ACCEPT any name-do not probe.

String 25

J9. **[CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]**
Before that, [were / was] [you / he / she] widowed, divorced, or had [you / he / she] never been married?

|------------------|-----------|-------------------------------|-----------------------------------------------|

GO TO J27CKPT

GO TO J11MO

GO TO J12MO

J10MO. **[CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]**
In what month and year [were / was] [you / he / she] widowed?
- SELECT Month and [Enter] to go to next screen for year
- IF NECESSARY: What would be your best estimate?

|-----------|------------|---------|---------|

J10YR. **[CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]**
The month entered is: [J10MO]
- ENTER the year below

<table>
<thead>
<tr>
<th>1901- [CYEAR]</th>
<th>Actual year</th>
</tr>
</thead>
<tbody>
<tr>
<td>9996</td>
<td>[P2YEAR]-[CYEAR], DK which year</td>
</tr>
<tr>
<td>9997</td>
<td>Before [P2YEAR], DK exact year</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>1901 – [P3YEAR]</th>
<th>[P2YEAR] – [CYEAR]</th>
</tr>
</thead>
<tbody>
<tr>
<td>9996. [P2YEAR] – [CYEAR], DK Which Year</td>
<td></td>
</tr>
<tr>
<td>9997. Before [P2YEAR], DK Exact Year</td>
<td></td>
</tr>
</tbody>
</table>

GO TO J27CKPT

J11MO. **[CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]**
In what month and year did [your / his / her] (divorce / annulment) become final?
- SELECT Month and [Enter] to go to next screen for year
- IF NECESSARY: What would be your best estimate?

|-----------|------------|---------|---------|-------|
J11YR. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
The month entered is: [J11MO]
• ENTER the year below
  1901- [CYEAR]  Actual year
  9996 [P2YEAR]-[CYEAR], DK which year
  9997 Before [P2YEAR], DK exact year

  9997. Before [P2YEAR], DK Exact Year

J12MO. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
In what month and year did [you / they] stop living together?
• SELECT Month and [Enter] to go to next screen for year
• IF NECESSARY: What would be your best estimate?


J12YR. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
The month entered is: [J12MO]
• ENTER the year below
  1901- [CYEAR]  Actual year
  9996 [P2YEAR]-[CYEAR], DK which year
  9997 Before [P2YEAR], DK exact year

  9997. Before [P2YEAR], DK Exact Year

End Marriage Update

All Marriages
J12A. AQSN OF FU MEMBER

J13CKPT. CAI CHECKPOINT: WHETHER FU MEMBER NEVER MARRIED (MARITAL=2)

  1. NEVER MARRIED  → GO TO J27CKPT  5. ALL OTHERS

J14. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
[H/W/"W": (Now) I’d like to ask about [your / HEAD’s / WIFE’s/“WIFE’s”] family history. / 1st OFUM: Now let’s talk about the other members of the family. / ALL OTHERS: (Now let’s talk about the other members of the family.)]
Altogether, how many times [have / has] [you / HEAD / WIFE/“WIFE” / CYNAMF] been married?

  1  → GO TO J21MO  2 – 15 [DK/RF]  → GO TO J21MO

↓
J15MO. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
In what month and year did [you / he / she] get married for the first time?
- SELECT Month and [Enter] to go to next screen for year
- IF NECESSARY: What would be your best estimate?

<table>
<thead>
<tr>
<th>Month</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
</table>

J15YR. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
The month entered is: [J15MO]
- ENTER the year below
  1901-[CYEAR] Actual year
  9996 [P2YEAR]-[CYEAR], DK which year
  9997 Before [P2YEAR], DK exact year

<table>
<thead>
<tr>
<th>Year Range</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
</table>

J16. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
What was [your / his / her] first [wife’s / husband’s] name?
- ACCEPT any name-do not probe

String 25

J17. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
Did that marriage end in widowhood, divorce, or what?

<table>
<thead>
<tr>
<th>Option</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>3. Widowhood</td>
<td>4. Divorce, marriage annulled</td>
<td>7. Other-specify (J17SPEC. Specify (String 100))</td>
<td></td>
</tr>
</tbody>
</table>

GO TO J19MO
GO TO J20MO

J18MO. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
In what month and year [were / was] [you / he / she] widowed?
- SELECT Month and [Enter] to go to next screen for year
- IF NECESSARY: What would be your best estimate?

<table>
<thead>
<tr>
<th>Month</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
</table>

J18YR. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
The month entered is: [J18MO]
- ENTER the year below
  1901- [CYEAR] Actual year
  9996 [P2YEAR]-[CYEAR], DK which year
  9997 Before [P2YEAR], DK exact year

<table>
<thead>
<tr>
<th>Year Range</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
</table>

GO TO J21MO
J19MO. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
In what month and year did [your / his / her] (divorce / annulment) become final?
• SELECT Month and [Enter] to go to next screen for year
• IF NECESSARY: What would be your best estimate?


J19YR. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
The month entered is: [J19MO]
• ENTER the year below
1901- [CYEAR] Actual year
9996 [P2YEAR]-[CYEAR], DK which year
9997 Before [P2YEAR], DK exact year


J20MO. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
In what month and year did [you / he / she] stop living together?
• SELECT Month and [Enter] to go to next screen for year
• IF NECESSARY: What would be your best estimate?


J20YR. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
The month entered is: [J20MO]
• ENTER the year below
1901- [CYEAR] Actual year
9996 [P2YEAR]-[CYEAR], DK which year
9997 Before [P2YEAR], DK exact year


J21MO. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
In what month and year did [you / he / she] (last) get married?
• SELECT Month and [Enter] to go to next screen for year
• IF NECESSARY: What would be your best estimate?

J21YR. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
The month entered is: [J21MO]
- ENTER the year below
  1901 - [CYEAR]  Actual year
  9996 - [P2YEAR]-[CYEAR], DK which year
  9997 - Before [P2YEAR], DK exact year

J22. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
What (was / is) [your wife’s / his wife’s / your husband’s / her husband’s] name?
- ACCEPT any name-do not probe
String 25

J23CKPT. CAI CHECKPOINT: FU MEMBER MARITAL STATUS (MARITAL=3, 5, 4, 1, 2)
1. WIDOWED
2. SEPARATED, MARRIED “W”
3. DIVORCED, ANNULLMENT
4. MARRIED H/W/OFUM
↓
GO TO J26MO  GO TO J25MO  GO TO J27CKPT

J24MO. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
In what month and year [were / was] [you / he / she] widowed?
- SELECT Month and [Enter] to go to next screen for year
- IF NECESSARY: What would be your best estimate?


J24YR. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
The month entered is: [J24MO]
- ENTER the year below
  1901 - [CYEAR]  Actual year
  9996 - [P2YEAR]-[CYEAR], DK which year
  9997 - Before [P2YEAR], DK exact year

J25MO. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
In what month and year did [your / his / her] (divorce / annulment) become final?
- SELECT Month and [Enter] to go to next screen for year
- IF NECESSARY: What would be your best estimate?

J25YR. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
The month entered is: [J25MO]
- ENTER the year below
  
  1901 - [CYEAR]  Actual year
  9996  [P2YEAR]-[CYEAR], DK which year
  9997  Before [P2YEAR], DK exact year


J26MO. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
In what month and year did [you / they] stop living together?
- SELECT Month and [Enter] to go to next screen for year
- IF NECESSARY: What would be your best estimate?


J26YR. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
The month entered is: [J26MO]
- ENTER the year below
  
  1901 - [CYEAR]  Actual year
  9996  [P2YEAR]-[CYEAR], DK which year
  9997  Before [P2YEAR], DK exact year


End All Marriages

Own Kids
CNTOTHKIDS. # CHILDREN REPORTED PREVIOUSLY & THIS PERSON REPORTED AS THE OTHER PARENT (1 – 20)

J27CKPT. CAI CHECKPOINT: WHETHER FU MEMBER IS ELIGIBLE FOR OWN KIDS SECTION; TYPE A (J1CKPT=1), TYPE B1, B2 (J1CKPT=3-4), TYPE C1 (J1CKPT=6-9), TYPE C2 (J1CKPT=11-14)

| 1. TYPE A | 2. TYPES B1, B2 | TYPE B3 (J1CKPT=5) | 3. TYPES C1A-D, TYPES C2A-D |

↓ NO MORE SECTION J FOR THIS PERSON GO TO J30

J28. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
[1st ITERATION: We are updating the information we collected in [P2YEAR].]
[CNTOTHKIDS>0: Including [your / his /her] [child / children] ([CNTOTHKIDS]) we already spoke about, [have / has] / ALL OTHERS: [Have / Has] [you and your wife had / you and HEAD had / HEAD and WIFE had / you fathered / HEAD fathered / you given birth to / FEMALE HEAD/WIFE/"WIFE" given birth to] any children since [REINTERVIEW & PYIWDATE=RESPONSE: our last interview on [PYIWDATE] / SPLITOFF, REINTERVIEW & PYIWDATE=NONRESPONSE: January [P2YEAR]]?
- DO NOT count stillbirths, stepchildren, or adopted children
- [FU MEMBERS AGE<=2 & CYFUHU=FUMI: IWER: FU child(ren) born since [P2YEAR]: CYNAMF CYNAML, AGEIWDATE, CYAQRTH, CYFUHU

| 1. Yes | 5. No |

↓ GO TO J32CKPT
J29. How many is that? (Since [REINTERVIEW & PYIWDATE=RESPONSE: our last interview on PYIWDATE] / SPLITOFF, REINTERVIEW & PYIWDATE=NONRESPONSE: January [P2YEAR])?

- [CNTOTHKIDS>0: If needed: Including [your / his /her] [child / children] ([CNTOTHKIDS]) we already spoke about]
- [FU MEMBERS AGE<=2 & CYFUHU=FUMI: IWER: FU child(ren) born since [P2YEAR]: CYNAMF CYNAML, AGEIWDATE, CYAQRTH, CYFUHU]

1 – 20 → GO TO OTHKID RULE DK/RF → GO TO J32CKPT

J30. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]

[Now let’s talk about the other members of the family. / (Now, we would like to ask about births of children.)]

- [CNTOTHKIDS>0: Including [your / his /her] [child / children] ([CNTOTHKIDS]) we already spoke about, how / ALL OTHERS: How] many children [have / has] [you ever fathered / you yourself ever given birth to / [CYNAMF] ever fathered / [CYNAMF] ever given birth to]?
- DO NOT count stillbirths, stepchildren, or adopted children
- [FU MEMBERS AGE<=2 & CYFUHU=FUMI: IWER: FU child(ren) born since [P2YEAR]: CYNAMF CYNAML, AGEIWDATE, CYAQRTH, CYFUHU]

0 → GO TO J32CKPT 1 – 20 DK/RF → GO TO J32CKPT

↓

OTHKID RULE: WHETHER TYPE A (J1CKPT=1), TYPE B1, B2 (J1CKPT=3-4), TYPE C1 (J1CKPT=6-9), TYPE C2 (J1CKPT=11-14)

- TYPE A → GO TO J31 RULE
- ALL OTHER TYPES
  - CNTOTHKIDS = 0
  - CNTOTHKIDS > 0

GO TO J31 RULE ↓

OTHKID[1..10], [CYNAMF CYNAML, CYAQRTH, age: AGEIWDATE]

IWER: VERIFY each child already reported for [CYNAMF]: Before we go on, I’d like to confirm [your / CYNAMF’s] [CNTOTHKIDS=1: child / CNTOTHKIDS>1: children] we already spoke about: ([First / Next], how about) [J31] ([J31NAML])? ([J31] was reported as [your / CYNAMF’s] child, is that right?)

- ENTER [1] if Child verified as [CYNAMF’s] child
- [NAME] [DOB] [PARENT NAME]

1. Yes 5. No

J31 Name Block

J31 RULE: VALUE OF J29 J30COUNT minus number of children with OTHKID = YES (KIDSCOUNT)

KIDSCOUNT <= 0 → GO TO J32CKPT KIDSCOUNT > 0

↓

J31. CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]

[FIRST LOOP: Now let’s talk about [your / CYNAMF’s] [OTHKID = YES: other] [CNTJ31KIDS =1: child / CNTJ31KIDS >1: children] / ALL OTHERS: (Now let’s talk about [your / CYNAMF’s] [OTHKID = YES: other] [CNTJ31KIDS =1: child / CNTJ31KIDS >1: children]).

[FIRST LOOP: What is [CNTJ31KIDS =1: this / CNTJ31KIDS >1: [1st LOOP: the first / ALL OTHERS: the next]] child’s name [FIRST LOOP: , including middle and last names / ALL OTHERS: (, including middle and last names)]?]

- ENTER First Name

String 25
J31NAMM. CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
(What is [CNTJ31KIDS D =1: this / CNTJ31KIDS >1: [1ST LOOP: the first / ALL OTHERS: the next]] child’s name, including middle and last names?)
- ENTER Middle Name
- If none, PRESS [Enter] to continue

String 25

J31NAML. CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
(What is [CNTJ31KIDS =1: this / CNTJ31KIDS >1: [1ST LOOP: the first / ALL OTHERS: the next]] child’s name, including middle and last names?)
- ENTER Last Name

String 25

OTHPARENT RULE:

[TYPE A (J1CKPT=1)] → GO TO DADAQSN  ALL OTHERS

OTHPARENT. [J31] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
Who is [J31]’s birth [(Type B1, C1A, C2A) and CYAqrth=101] or (Type C1D, C2D and CYAqrth>222 and FUGender=male): mother / (Type B2, C1B, C2B) and CYAqrth=102,202,222) or (C1D, C2D and CYAqrth=222 and FUGender=female): father?

AQS N list of FU Members age 12+ [females/males]

OTHPARENTNAMF. Other parent of: [J31] (Child of [CYAQRTH, CYNAMF CYNAML])
What is [(Type B1, C1A, C2A) and cyaqthr=101] or (C1D, C2D and cyaqthr>222 and FUGender=male): her / [(Type B2, C1B, C2B) and cyaqthr=102,202,222) or (C1D, C2D and cyaqthr>222 and FUGender=female): his] name (first and last names)?
- ENTER [Mother’s / Father’s] First Name
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 25

OTHPARENTNAML. [OthParentNamF] Other parent of: [J31] (Child of [CYAQRTH, CYNAMF CYNAML])
(What is [(Type B1, C1A, C2A) and cyaqthr=101] or (C1D, C2D and cyaqthr>222 and FUGender=male): her / [(Type B2, C1B, C2B) and cyaqthr=102,202,222) or (C1D, C2D and cyaqthr>222 and FUGender=female): his] name (first and last names)?
- ENTER [Mother’s / Father’s] Last Name
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 25
OTHPPARENTBMO. [OthParentNamF OthParentNamL] Other parent of: [J31] (Child of [CYAQRTH, CYNAMF CYNAML])
What is [OTHPPARENTNAMF]’s full birthdate?

- SELECT month
- IF NECESSARY: What would be your best estimate?


OTHPPARENTBDY. [OthParentNamF OthParentNamL] Other parent of: [J31] (Child of [CYAQRTH, CYNAMF CYNAML])
(What is [OTHPPARENTNAMF]’s full birthdate?)
The month entered is: [OthParentBMo]
- ENTER day

1 – 31

OTHPPARENTBDRY. [OthParentNamF OthParentNamL] Other parent of: [J31] (Child of [CYAQRTH, CYNAMF CYNAML])
(What is [OTHPPARENTNAMF]’s full birthdate?)
The month/day entered is: [OthParentBMo] / [OthParentBDy]
- ENTER the year below 1901- [CYEAR]

1901 - [P3YEAR]

OTHPPARENTWHERE. [OthParentNamF OthParentNamL] Other parent of: [J31] (Child of [CYAQRTH, CYNAMF CYNAML])
Is [OTHPPARENTNAMF] living with you now, has [he / she] set up a separate household, or what?

1. Living in FU now 5. Set up a separate household 6. Deceased 7. Other-specify (OthParWhSpec . Specify (String 100))

GO TO DADAQSN

↓

OUTHPPARENTADDR1. [OthParentNamF OthParentNamL] Other parent of: [J31] (Child of [CYAQRTH, CYNAMF CYNAML])
What is [OTHPPARENTNAMF]’s address?
Address 1
- IF R has a street address and a PO Box, ENTER PO Box here and enter street address in the Address2 field.
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 40

OUTHPPARENTAPTS. [OthParentNamF OthParentNamL] Other parent of: [J31] (Child of [CYAQRTH, CYNAMF CYNAML])
(What is [OTHPPARENTNAMF]’s address?)
Apt/Suite
- If none, PRESS [Enter] to continue

String 10
OTH PARENT ADDR2. [OthParentNamF OthParentNamL] Other parent of: [J31] (Child of [CYAQRTH, CYNAMF CYNAML])
(What is [OTHPARENTNAMF]’s address?)
Address 2
- IF R has a street address and a PO Box, ENTER street address here.
- IF none, PRESS [Enter] to continue
String 40

OTH PARENT CITY. [OthParentNamF OthParentNamL] Other parent of: [J31] (Child of [CYAQRTH, CYNAMF CYNAML])
(What is [OTHPARENTNAMF]’s address?)
City
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]
String 40

OTH PARENT STATE. [OthParentNamF OthParentNamL] Other parent of: [J31] (Child of [CYAQRTH, CYNAMF CYNAML])
(What is [OTHPARENTNAMF]’s address?)
State
- Start typing the name of the State to bring up the look-up list
- IF foreign country, ENTER [FOR] to select “Foreign Country”
String 4; State Lookup List. State String 4; State Lookup List. State
Foreign Country DK/RF → GO TO DADAQSN

OTH PARENT ZIP. [OthParentNamF OthParentNamL] Other parent of: [J31] (Child of [CYAQRTH, CYNAMF CYNAML])
(What is [OTHPARENTNAMF]’s address?)
Zip Code
- IF foreign country, ENTER all [0]’s
- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER all [0]’s
String 10; all 8’s/9’s not allowed

OTH PARENT CTRY. [OthParentNamF OthParentNamL] Other parent of: [J31] (Child of [CYAQRTH, CYNAMF CYNAML])
(What is [OTHPARENTNAMF]’s address?)
Country if different from USA
- Start typing the name of the Foreign Country to bring up the look-up list
String 2; Country Lookup List

DADAQSN. ASSIGN AQSN of THIS child’s father (J2, OR 1-24 FOR OTHPARENT 1-24, OR EMPTY FOR OTHPARENT=31-50)
MOMAQSN. ASSIGN AQSN of THIS child’s mother (J2, OR 1-24 FOR OTHPARENT 1-24, OR EMPTY FOR OTHPARENT=31-50)

OS1 RULE: NUMBER OF CHILDREN LISTED (J29, J30)
MORE CHILDREN → REPEAT J31 - MOMAQSN; MAX=20;
THEN GO TO OS1

NO MORE CHILDREN
End J31 Name Block

OS1: OS9 Block
OS1. [J31 J31NAML] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEWDATE]
(Now) Let's talk about [J31]. (We can't always tell from a name. Is that a male or a female?)
1. Male 2. Female
OS2MO. [J31 J31NAML] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
What is [J31’s] full birthdate?
• SELECT Month
• IF NECESSARY: What would be your best estimate?

OS2DY. [J31 J31NAML] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
(What is [J31’s] full birthdate?)
The month entered is: [OS2MO]
• ENTER day
1 – 31

OS2YR. [J31 J31NAML] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
The month entered is: [OS2MO]
(What is [J31’s] full birthdate?)
• ENTER the year below
1901 - [CYEAR] Actual year
9996 [P2YEAR]-[CYEAR], DK which year
9997 Before [P2YEAR], DK exact year
GO TO OS3LBS. [J31 J31NAML] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
How much did [he / she] weigh at birth?
• ENTER weight in pounds and ounces or press [Enter] to go to next screen for kilograms
[ENTER] → GO TO OS3KILO 0 – 20 DK/RF → GO TO OS3A
↓
OS3OZ. [J31 J31NAML] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
• The weight in pounds entered is: [OS3LBS]
• ENTER the ounces
0 – 15
GO TO OS10A

OS3KILO. [J31 J31NAML] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
(How much did [he / she] weigh at birth?)
• ENTER weight in kilograms
0.0 – 9.1 → GO TO OS10A DK/RF
OS3A. [J31 J31NAML] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
Did [he / she] weigh more than 5-1/2 pounds (2500 grams) or less than 5-1/2 pounds (2500 grams), or what?

1. More than 5-1/2 pounds 2. Less than 5-1/2 pounds 3. About 5-1/2 pounds DKK/RF

GO TO OS10A

OS3B. [J31 J31NAML] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
Did [he / she] weigh more than 9 pounds (4100 grams) or less than 9 pounds (4100 grams), or what?

1. More than 9 pounds 2. Less than 9 pounds 3. About 9 pounds

OS10A. [J31 J31NAML] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
What was [his / her] length at birth?
- ENTER length in inches or press [Enter] to go to next screen for centimeters

[ENTER] 6 – 30 DKK/RF → GO TO OS10C

GO TO OS10B

OS10CENT. [J31 J31NAML] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
(What was [his / her] length at birth?)
- ENTER length in centimeters

15.2 – 76.2 DKK/RF → GO TO OS10C

↓

OS10B. [J31 J31NAML] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
INTERVIEWER: Did R indicate that the length of the baby was an estimate?

1. Yes 5. No

OS10C. [J31 J31NAML] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
Did [R=MOTHER: you / ALL OTHER Rs: [MOTHER / [J31]’s mother]] breastfeed [J31] at all?
- ENTER [1] for any amount of breastfeeding by R
- ENTER [1] if R only expressed or pumped breastmilk to be fed to the baby
- ENTER [1] if R is still breastfeeding this child

1. Yes 5. No

OS4TOWN. [J31 J31NAML] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
Where was [he / she] ([J31]) born?
- ENTER Town and go to next screen for State
- For Don’t Know, ENTER [Ctrl D]
- For Refusal, ENTER [Ctrl R]

String 25
OS4STATE. [J31 J31NAML] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
What is the State?
[OS4TOWN]
- Start typing the name of the State to bring up the look-up list
- For foreign country birth, ENTER [FOR] to select “Foreign Country” from the state list

String 30; State Lookup List. State → GO TO OS5 Foreign Country | DK/RF → GO TO OS5

OS4COUNTRY. [J31 J31NAML] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
What is the Country?
[OS4TOWN], [OS4STATE]
- Start typing the name of the Foreign Country to bring up the look-up list

String 25; Country Lookup List

OS5. [J31 J31NAML] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
Is [J31] living with you now, away with [his / her] [father / mother], with some other relative, [has he/she set up a separate household], or what?
- If R says “adopted out”, PROBE: Was that to a relative or to a non-relative?

1. Living in FU now
2. Living with father elsewhere
3. Living with mother elsewhere
4. Living with other relative elsewhere
5. Set up a separate household
6. Deceased
7. Other-specify (OSSSPEC. Specify (String 100))
8. Adopted out to relative
9. Adopted out to non-relative
10. Adopted out; don’t know/refused to whom

GO TO OS7

OS6MO. [J31 J31NAML] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
In what month and year did [he / she] die?
- SELECT Month and [Enter] to go to next screen for year
- IF NECESSARY: What would be your best estimate?


OS6YR. [J31 J31NAML] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
The month entered is: [OS6MO]
- ENTER the year below
1901- [CYEAR] Actual year
9996 [P2YEAR]-[CYEAR], DK which year
9997 Before [P2YEAR], DK exact year


GO TO OS8 RULE
OS7. [J31 J31NAML] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
Is [he / she] Spanish, Hispanic, or Latino? That is, Mexican, Mexican American, Chicano, Puerto Rican, Cuban, or other Spanish?

4. Puerto Rican  5. Cuban  7. Other-specify (OS7SPEC. Specify (String 100))

OS8. [J31] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
What is [his / her] race? Is [he / she] white, black, American Indian, Alaska Native, Asian, Native Hawaiian, or Pacific Islander?
• ENTER all that apply
• PROBE: Any others?
3. American Indian or Alaska Native  5. Native Hawaiian
6. Pacific Islander  7. Other-specify (OS8SPEC. Specify (String 100))

GO TO OS8 RULE

OS8A. [J31 J31NAML] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
Would that be Chinese, Filipino, Asian Indian, or what?
7. Other Asian-specify (OS8ASPEC. Specify (String 100))

OS8 RULE: NUMBER OF CHILDREN LISTED (J29, J30)
MORE CHILDREN → REPEAT J31- OS8; MAX=20; NO MORE CHILDREN
THEN GO TO OS71CKPT

End OS1-OS9 Block

Multiple Birth Block
OS71CKPT. CAI CHECKPOINT: WHETHER ANY NEWBORNS NOT ADOPTED OUT HAVE THE SAME BIRTH DATES +/- ONE DAY

1- 7. MULTIPLE BIRTH AND NOT ADOPTED OUT 8. ALL OTHERS → GO TO OS10CKPT

OS71. Child 1: [J31], DOB: [OS2MO/OS2DY/OS2YR] ... Child 8: [J31], DOB: [OS2MO/OS2DY/OS2YR]

1. Yes  5. No

OS72. Child 1: [J31], DOB: [OS2MO/OS2DY/OS2YR] ... Child 8: [J31], DOB: [OS2MO/OS2DY/OS2YR]
Are they identical [twins / triplets / quadruplets / quintuplets / sextuplets / septuplets / octuplets] or are they fraternal [twins / triplets / quadruplets / quintuplets / sextuplets / septuplets / octuplets]?
• IF [twins / triplets / quadruplets / quintuplets / sextuplets / septuplets / octuplets] are not the same sex, they are fraternal
1. Identical  2. Fraternal  OK/RF → GO TO OS74

↓

OS73. Child 1: [J31], DOB: [OS2MO/OS2DY/OS2YR] ... Child 8: [J31], DOB: [OS2MO/OS2DY/OS2YR]
How do you know they are [identical / fraternal] [twins / triplets / quadruplets / quintuplets / sextuplets / septuplets / octuplets]?

- ENTER all that apply
- PROBE: Any others?

1. Cheek swab DNA test  
2. Blood DNA test  
3. Placental membrane DNA test  
4. Blood typing test  
5. Observation of placenta  
6. Doctor/midwife told me  
7. Completed a questionnaire  
8. Someone else not present at delivery told me  
9. Other – specify (OS73SPEC. Please specify. (String 100))

OS74. Child 1: [J31], DOB: [OS2MO/OS2DY/OS2YR] ... Child 8: [J31], DOB: [OS2MO/OS2DY/OS2YR]

Are they often mistaken for each other, or are they different enough to tell apart?

1. Often mistaken for one another  
2. Different enough to tell apart

End Multiple Birth Block

OS10CKPT. CAI CHECKPOINT: WHETHER THIS CHILD IS NEWBORN AND NOT ADOPTED OUT ((IWTYPE=REINT,SO AND OS5<>8, 9, 10 AND (J1CKPT=TYPEA, B1, B2 AND (OS2MO/DY/yr>PYIWDATE OR OS2YR=9996)) or (J1CKPT=TYPEC1 AND (OS2YR=P2YEAR-CYEAR, 9996)) OR (IWTYPE=RECON,REC (TYPEC2) AND OS5<>8, 9, 10 AND OS2YR=P2YEAR-CYEAR, 9996))

- 1. CHILD IS NEWBORN AND NOT ADOPTED OUT
- 5. ALL OTHERS \(\rightarrow\) GO TO NEXT CHILD/J32CKPT

End OS1_OS9 Block

Per Pregnancy Block

OS11CKPT. CAI CHECKPOINT: WHETHER NEWBORN IS SINGLE-BIRTH OR MULTIPLE BIRTH

- 1. NEWBORN IS SINGLE-BIRTH, OR 1st OF MULTIPLE BIRTH
- 5. OTHER NEWBORN OF MULTIPLE BIRTH \(\rightarrow\) GO TO OS28

OSAQSN. AQSN OF FU MEMBER (SEE J2)
DADAQSN. AQSN of child’s father
MOMAQSN. AQSN of child’s mother


How many weeks pregnant \([R=MOTHER: were you / ALL OTHERS: was] [MOTHER / [J31’s] [MULTIPLE BIRTH: and [J31’s] [and [J31’s]... mother] when \([R=MOTHER: you / ALL OTHERS: she] learned that \([R=MOTHER: you were / ALL OTHERS: she was] pregnant with [J31] [MULTIPLE BIRTH: and [J31] [and [J31]]...]? \n
- ENTER number of weeks
- Weeks of pregnancy should be counted as completed weeks since the last normal menstrual period.

0 - 40 \(\rightarrow\) GO TO OS13

DK/RF

\(\downarrow\)
MULTIPLE BIRTH: CHILDREN / ALL OTHERS: CHILD] OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]

Was it less than three months, more than three months, or what?

1. Less than 3 months  2. More than 3 months  3. About 3 months  DK/RF

GO TO OS13

MULTIPLE BIRTH: CHILDREN / ALL OTHERS: CHILD] OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]

Was it less than six months, more than six months, or what?

1. Less than 6 months  2. More than 6 months  3. About 6 months

MULTIPLE BIRTH: CHILDREN / ALL OTHERS: CHILD] OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]

In the 6 months before [R=MOTHER: you / ALL OTHER Rs: [MOTHER / [J31’s] [MULTIPLE BIRTH: and [J31’s] [and [J31’s]... mother]] found out [R=MOTHER: you were / ALL OTHERs: she was] pregnant (with [J31] [MULTIPLE BIRTH: and [J31] [and [J31]]...]), how many cigarettes did [R=MOTHER: you / ALL OTHERs: she] smoke a day, on average?

- DEFINITION: A standard pack of American cigarettes contains 20 cigarettes

1. 0 → GO TO OS16
2. 1 - 200
3. DK/RF → GO TO OS16

MULTIPLE BIRTH: CHILDREN / ALL OTHERS: CHILD] OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]

After [R=MOTHER: you / ALL OTHER Rs: [MOTHER / [J31’s] [MULTIPLE BIRTH: and [J31’s] [and [J31’s]... mother]] found out [R=MOTHER: you were / ALL OTHERs: she was] pregnant this time (with [J31] [MULTIPLE BIRTH: and [J31] [and [J31]]...]), did [R=MOTHER: you / ALL OTHERs: she] smoke cigarettes at all during the pregnancy?

1. Yes  2. No

MULTIPLE BIRTH: CHILDREN / ALL OTHERS: CHILD] OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]

On average, how many cigarettes did [R=MOTHER: you / ALL OTHER Rs: [MOTHER / [J31’s] [MULTIPLE BIRTH: and [J31’s] [and [J31’s]... mother]] smoke per day after [R=MOTHER: you / ALL OTHERs: she] found out that [R=MOTHER: you were / ALL OTHERs: she was] pregnant this time (with [J31] [MULTIPLE BIRTH: and [J31] [and [J31]]...])?

- DEFINITION: A standard pack of American cigarettes contains 20 cigarettes

1. 0 - 200
2. DK/RF

MULTIPLE BIRTH: CHILDREN / ALL OTHERS: CHILD] OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]

Did [R=MOTHER: you / ALL OTHER Rs: [MOTHER / [J31’s] [MULTIPLE BIRTH: and [J31’s] [and [J31’s]... mother]] drink any alcoholic beverages, including beer, wine, or liquor, during the 12 months before [J31] [MULTIPLE BIRTH: and [J31] [and [J31]]...]? [was / were] born?

1. Yes  2. No

MULTIPLE BIRTH: CHILDREN / ALL OTHERS: CHILD] OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
During [R=MOTHER: your / ALL OTHERS: that] pregnancy, on average, how often did [R=MOTHER: you / ALL OTHERS: she] have any alcohol to drink? Would you say: never, 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. Never
2. Less than once a month
3. About once a month
4. Several times a month
5. About once a week
6. Several times a week
7. Every day

Was a cesarean delivery done?
- IF NECESSARY, PROBE: (Was/Were) [J31] [MULTIPLE BIRTH: and [J31] [and [J31]... delivered by an incision in
  [R=MOTHER: your / ALL OTHERS: [MOTHER’S / [J31’S] [MULTIPLE BIRTH: and [J31’S] [and [J31’S]... mother’s]] abdomen?

1. Yes 5. No → GO TO OS23Months

Was this [R=MOTHER: your / ALL OTHER Rs: [MOTHER’S / [J31’S] [MULTIPLE BIRTH: and [J31’S] [and [J31’S]... mother’s]] first cesarean delivery, or did [R=MOTHER: you / ALL OTHERS: she] have one before?

1. Yes, first cesarean
5. No, had cesarean before

How many months or weeks had [R=MOTHER: you / ALL OTHER Rs: [MOTHER / [J31’S] [MULTIPLE BIRTH: and [J31’S] [and [J31’S]... mother]] been pregnant when [J31] [was / were] born?
- ENTER number of months here and number of weeks on next screen
- ENTER [0] if R reports number of weeks only
- PROBE for an exact number; Fill fields for both months and weeks as R reports them. For example:
  “2 1/2 months” should be entered as 2 months and 2 weeks
  “9 months” would be entered as 9 months and 0 weeks.
  “40 weeks” would be entered as 0 months and 40 weeks

0 - 10 DK/RF → GO TO OS24

How many months or weeks had [R=MOTHER: you / ALL OTHER Rs: [MOTHER / [J31’S] [MULTIPLE BIRTH: and [J31’S] [and [J31’S]... mother]] been pregnant when [J31] [was / were] born?
- ENTER number of weeks
- ENTER [0] for None
- PROBE for an exact number; Fill fields for both months and weeks as R reports them. For example:
  “2 1/2 months” should be entered as 2 months and 2 weeks
  “9 months” would be entered as 9 months and 0 weeks.
  “40 weeks” would be entered as 0 months and 40 weeks

0 - 44 → GO TO OS27 DK/RF → GO TO OS24
OS23 SOFT CHECK: IF OS23MONTHS+OS23WEEKS < 6 MOS/24 WKS OR > 10 MOS/44 WKS; OS23MONTHS=RESPONSE and OS23WEEKS=RESPONSE; SUPPRESS GOES TO OS27
R has reported a < 6 MOS/24 WKS: live birth occurring earlier than 24 weeks or 6 months of pregnancy / > 10 MOS/44 WKS: pregnancy longer than 44 weeks or 10 months. This is extremely unlikely. Please correct the months or weeks of gestation, if necessary. If you suppress this check, please enter an F2 comment for the reason.

A preterm delivery is one that occurs at 36 weeks or earlier in pregnancy. As far as you know, did [R=MOTHER: you / ALL OTHER Rs: [MOTHER / [J31’s] [MULTIPLE BIRTH: and [J31’s] [and [J31’s]...] mother]] have a preterm delivery?
1. Yes 5. No

When [J31] [MULTIPLE BIRTH: and [J31] [and [J31]...] [was / were] born, how was the delivery bill paid?
• ENTER all that apply
• PROBE: Any other ways?
• IF DK: Was it employer-provided health insurance, private health insurance, Medicaid or a state program, military provided such as Tricare, ChampUS or ChampVA, Indian health insurance, Veterans’ Administration, some other plan, or out-of-pocket?
• If R says “bill still unpaid”, ASK: How do you think that bill will be paid?
• Do not include costs of prenatal care, only costs of the delivery and any follow-up care.

1. Employer provided health insurance (current or former employer) 2. Private health insurance purchased
7. Tricare/Champus/ChampVA (Dependents, veterans) 8. Indian Health Insurance
11. VA (Veterans’ Administration) 12. Out-of-pocket
13. No payment required (IF VOL) 97. Other-specify (OS27SPEC. Specify (String 100))

Per Newborn Block
OS28. [J31 J31NAML] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
[>1st LOOP: (And)] How many days did [J31] stay in the hospital?
• ENTER number of days
• ENTER [994] if baby still in hospital
• ENTER [995] if less than 1 day (less than 24 hours)
• ENTER [996] if baby not born in a hospital
• ENTER [997] if baby did not stay in hospital
1 – 150 994. Still in hospital (IF VOL) 995. < 1 day (IF VOL) OK/RF 996. Not born in hospital (IF VOL) 997. Didn’t stay in hospital (IF VOL)

GO TO OS40 RULE

OS30. [J31 J31NAML] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
Did [J31] receive any newborn care in an intensive care unit, premature nursery, or any other type of special care facility?
1. Yes 5. No

GO TO OS40 RULE
OS31. [J31 J31NAML] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]  
How many days did [J31] stay in this special care facility after birth?  
• ENTER number of days
  
1 – 150 994. Baby still in special care facility

OS32. [J31 J31NAML] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]  
Did [J31] require assisted ventilation for more than 30 minutes?  
1. Yes 5. No → GO TO OS40 RULE

↓

OS33. [J31 J31NAML] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]  
How many days did [J31] require ventilation?  
• ENTER number of days
  
1 – 150

OS33 RULE: WHETHER SINGLE BIRTH OR MULTIPLE BIRTH & NO MORE NEWBORNS; OR MULTIPLE BIRTH & MORE NEWBORNS

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<thead>
<tr>
<th>SINGLE BIRTH; NO MORE NEWBORNS OF MULTIPLE BIRTH</th>
<th>MORE NEWBORNS OF MULTIPLE BIRTH</th>
</tr>
</thead>
<tbody>
<tr>
<td>REPEAT OS28 – OS33 FOR EACH</td>
<td></td>
</tr>
</tbody>
</table>

End Per Newborn Block

OS40 RULE: WHETHER SINGLE BIRTH OR MULTIPLE BIRTH AND THIS NEWBORN IS THE FIRST (OS11CKPT=1), OR MULTIPLE BIRTH AND THIS NEWBORN IS NOT THE FIRST(OS11CKPT=5)

<table>
<thead>
<tr>
<th>SINGLE BIRTH; 1st NEWBORN OF MULTIPLE BIRTH</th>
<th>REMAINING NEWBORN OF MULTIPLE BIRTH</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO OS64 RULE</td>
<td></td>
</tr>
</tbody>
</table>

When [R=MOTHER: you were / ALL OTHER Rs: [MOTHER / [J31’s] [MULTIPLE BIRTH: and [J31’s] [and [J31’s]... mother] was] pregnant with [J31] [MULTIPLE BIRTH: and [J31] [and [J31]]...]], did [R=MOTHER: you / ALL OTHERS: she] ever visit a doctor or other medical care provider for prenatal care, that is, for one or more pregnancy check-ups?  
• Include visits to a midwife or birthing center
  
1. Yes 5. No → GO TO OS51

↓

How many weeks pregnant [R=MOTHER: you were / ALL OTHER Rs: was [MOTHER / [J31’s] [MULTIPLE BIRTH: and [J31’s] [and [J31’s]... mother]] at the time of [R=MOTHER: your / ALL OTHERS: her] first prenatal care visit?  
• ENTER number of weeks completed since the last normal menstrual period  
• Weeks of pregnancy should be counted as completed weeks since the last normal menstrual period.  
• Include visits to a midwife or birthing center
  
1 – 40 → GO TO OS43 DK/RF

↓
OS42. [J31 J31NAML] [MULTIPLE BIRTH: CHILDREN / ALL OTHERS: CHILD] OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
Was it less than three months, more than three months, or what?

1. Less than 3 months  2. More than 3 months  3. About 3 months  DK/RF

GO TO OS43

↓

GO TO OS43

OS42A. [J31 J31NAML] [MULTIPLE BIRTH: CHILDREN / ALL OTHERS: CHILD] OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
Was it less than six months, more than six months, or what?

1. Less than 6 months  2. More than 6 months  3. About 6 months

OS43. [J31 J31NAML] [MULTIPLE BIRTH: CHILDREN / ALL OTHERS: CHILD] OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
How many visits to a doctor or other medical care provider for prenatal care did [R=MOTHER: you / ALL OTHER Rs: [MOTHER / [J31’s] [MULTIPLE BIRTH: and [J31’s] and [J31’s]... mother]] have when [R=MOTHER: you were / ALL OTHERs: she was] pregnant (with [J31] [MULTIPLE BIRTH: and [J31] and [J31]...])?

- ENTER number of prenatal care visits
- Do not include visits for WIC (Women, Infants, and Children nutritional program)
- Include visits to a midwife or birthing center

1 – 94

OS47. [J31 J31NAML] [MULTIPLE BIRTH: CHILDREN / ALL OTHERS: CHILD] OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
Where did [R=MOTHER: you / ALL OTHER Rs: [MOTHER / [J31’s] [MULTIPLE BIRTH: and [J31’s] and [J31’s]... mother]] go [OS43=2-94,DK/RF: most of the time] for [R=MOTHER: your / ALL OTHERs: her] prenatal [OS43=1: visit / OS43=2-94/DK/RF: visits]?

- Do not include visits for WIC (Women, Infants, and Children nutritional program)
- Include visits to a midwife or birthing center

1. Clinic or health center  2. Doctor’s office or HMO

3. Hospital emergency room  4. Hospital outpatient department

5. Midwife/birthing center  6. Some other place

7. Didn’t go to one place most often

How was [R=MOTHER: your / ALL OTHER Rs: [MOTHER’s / [J31’s] [MULTIPLE BIRTH: and [J31’s] [and [J31’s]... mother’s]] prenatal care paid for?

- ENTER all that apply
- PROBE: Any other ways?
- IF DK: Was it employer-provided health insurance, private health insurance, Medicaid or a state program, military provided such as Tricare, ChampUS or ChampVA, Indian health insurance, Veterans’ Administration, some other plan, or out-of-pocket?
- If R says “bill still unpaid”, ASK: How do you think that bill will be paid?

1. Employer provided health insurance (current or former employer)
2. Private health insurance purchased
5. Medicaid/[STEMEDPROG]/[SCHIPNAME]
6. Military Health Care/Tricare (Active duty)
7. Tricare/Champus/ChampVA (Dependents, veterans)
8. Indian Health Insurance
11. VA (Veterans’ Administration)
12. Out-of-pocket
13. No payment required (IF VOL)
97. Other-specify (OS48SPEC. Specify (String 100))


What was [R=MOTHER: your / ALL OTHER Rs: [MOTHER’s / [J31’s] [MULTIPLE BIRTH: and [J31’s] [and [J31’s]... mother’s]] weight just before [R=MOTHER: you / ALL OTHERs: she] delivered?

- ENTER weight in pounds or press [Enter] to continue to next screen for kilograms
- If more than 400 pounds, ENTER [400]

ENTER 100 - 400 DK/RF
↓ GO TO OS52


(What was [R=MOTHER: your / ALL OTHER Rs: [MOTHER’s / [J31’s] [MULTIPLE BIRTH: and [J31’s] [and [J31’s]... mother’s]] weight just before [R=MOTHER: you / ALL OTHERs: she] delivered?)

- ENTER weight in kilograms
- If more than 180 kilograms, ENTER [180]

36.0 – 180.0


What was [R=MOTHER: your / ALL OTHER Rs: [MOTHER’s / [J31’s] [MULTIPLE BIRTH: and [J31’s] [and [J31’s]... mother’s]] weight just before [R=MOTHER: you / ALL OTHERs: she] became pregnant (with [J31] [MULTIPLE BIRTH: and [J31] [and [J31]]...])?

- ENTER weight in pounds or press [Enter] to continue to next screen for kilograms
- If more than 400 pounds, ENTER [400]

[ENTER] 100 - 400 DK/RF
↓ GO TO OS53CKPT
OS52KILO. [J31 J31NAML] [MULTIPLE BIRTH: ; J31 J31NAML; J31 J31NAML] ... [MULTIPLE BIRTH: CHILDREN / ALL OTHERS: CHILD] OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]

(What was [R=MOTHER: your / ALL OTHER Rs: [MOTHER’s / [J31’s] [MULTIPLE BIRTH: and [J31’s] [and [J31’s]... mother’s]]] weight just before [R=MOTHER: you / ALL OTHERs: she] became pregnant (with [J31] [MULTIPLE BIRTHS: and [J31]] [and [J31]])?)

- ENTER weight in kilograms
- If more than 180 kilograms, ENTER

36.0 – 180.0

OS53CKPT. CAI CHECKPOINT: WHETHER WEIGHT LOSS, WEIGHT GAIN OR NO CHANGE; 1 LB=0.45 KG; 1 KG=2.2 LB

<table>
<thead>
<tr>
<th>1. WEIGHT LOSS</th>
<th>2. WEIGHT GAIN</th>
<th>3. NO CHANGE</th>
<th>5. ALL OTHERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO OS55CKPT</td>
<td>GO TO OS55CKPT</td>
<td>GO TO OS58CKPT</td>
<td>GO TO OS58CKPT</td>
</tr>
</tbody>
</table>

OS53. [J31 J31NAML] ... AGEIWDATE

Does that mean that [R=MOTHER: you / ALL OTHERs: she] lost
[OS52/KILO minus OS51/KILO] pounds (xxx.x kilograms) during
[R=MOTHER: your / ALL OTHERs: her] pregnancy?
- IF necessary, verify weights and go back to correct
- Weight before delivery: xxx.x pounds (xxx.x kilograms)
- Weight before pregnancy: xxx.x pounds (xxx.x kilograms)

1. Yes 5. No

GO TO OS55CKPT

OS54. [J31 J31NAML] ... AGEIWDATE

Does that mean that [R=MOTHER: you / ALL OTHERs: she] gained
[OS51/KILO minus OS52/KILO] pounds (xxx.x kilograms) during
[R=MOTHER: your / ALL OTHERs: her] pregnancy?
- IF necessary, verify weights and go back to correct
- Weight before delivery: xxx.x pounds (xxx.x kilograms)
- Weight before pregnancy: xxx.x pounds (xxx.x kilograms)

1. Yes 5. No

GO TO OS55CKPT

OS55. [J31 J31NAML] ... AGEIWDATE

Does that mean that [R=MOTHER: you / ALL OTHERs: she] did not gain or lose any weight during
[R=MOTHER: your / ALL OTHERs: her] pregnancy?
- IF necessary, verify weights and go back to correct
- Weight before delivery: xxx.x pounds (xxx.x kilograms)
- Weight before pregnancy: xxx.x pounds (xxx.x kilograms)

1. Yes 5. No

GO TO OS55CKPT


Did [R=MOTHER: you / ALL OTHERs: [MOTHER / [J31’s] [MULTIPLE BIRTH: and [J31’s] [and [J31’s]... mother]]] gain or lose weight during [R=MOTHER: your / ALL OTHERs: her] pregnancy (with [J31] [MULTIPLE BIRTH: and [J31] [and [J31]])?]

1. Gained weight 2. Lost weight 3. Did not gain or lose any weight DK/RF

GO TO OS58CKPT

OS57. [J31 J31NAML] [MULTIPLE BIRTH: ; J31 J31NAML; J31 J31NAML] ... [MULTIPLE BIRTH: CHILDREN / ALL OTHERS: CHILD] OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]

How much weight did [R=MOTHER: you / ALL OTHERs: she] [OS56=GAINED: gain / OS56=LOST: lose]?
- ENTER number of pounds or press [Enter] to continue to next screen for kilograms

[ENTER] 1-900 DK/RF

GO TO OS58CKPT
OS57KILO. 204
137
247
314
396
468

MULTIPLE BIRTH: CHILDREN / ALL OTHERS: CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]

(How much weight did [(R=MOTHER: you / ALL OTHERS: she)] [OS56=GAINED: gain / OS56=LOST: lose]?)

- ENTER number of kilograms

0.5 – 408.2

OS58CKPT. CAI CHECKPOINT: WHETHER R IS MOTHER OR FATHER OF THIS NEWBORN [RespAQSN=J2[Aqsn of this J person] or OthParent[Aqsn of other parent]]; ASKED ABOUT R AND OTHER PARENT OF THIS NEWBORN

1. R = MOTHER/FATHER OF NEWBORN 5. ALL OTHERS → GO TO OS64 RULE

↓

OS58. 222
271
322
377
425

[MULTIPLE BIRTH: CHILDREN / ALL OTHERS: CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]

Just before [R=MOTHER: you / R=FATHER: [MOTHER / J31’s] [MULTIPLE BIRTH: and [J31’s] [and [J31’s]... mother]] became pregnant with [J31] [MULTIPLE BIRTH: and [J31] [and [J31]...], did [R=MOTHER: you / R=FATHER: she] use any methods to keep from getting pregnant?

- Methods to keep from getting pregnant include abstinence, withdrawal, rhythm, natural family planning methods, and the pill.
- See [F1] help screen listing many possible birth control methods. Read methods to respondent only as necessary.

1. Yes 5. No 7. Never used any methods to prevent pregnancy (IF VOL) → GO TO OS60CKPT DK/RF

↓

OS59. 234
281
360
403

[MULTIPLE BIRTH: CHILDREN / ALL OTHERS: CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]

Had [R=MOTHER: you / R=FATHER: [MOTHER / J31’s] [MULTIPLE BIRTH: and [J31’s] [and [J31’s]... mother]] stopped all methods before [R=MOTHER: you / R=FATHER: she] became pregnant?

1. Yes 5. No 7. Never used any methods to prevent pregnancy (IF VOL)

↓

OS60CKPT. CAI CHECKPOINT: WHETHER MOTHER DID NOT USE OR STOPPED CONTRACEPTION BEFORE PREGNANCY ((OS58=NO, DK/RF AND OS59<>7) OR (OS59=YES))

1. STOPPED CONTRACEPTION 5. ALL OTHERS → GO TO OS62

↓

OS60. 230
210
234
360
443

[MULTIPLE BIRTH: CHILDEN / ALL OTHERS: CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]

Was the reason [R=MOTHER: you / R=FATHER: [MOTHER / J31’s] [MULTIPLE BIRTH: and [J31’s] [and [J31’s]... mother]] [OS59=YES: stopped / ALL OTHERS: were not] using any methods because [R=MOTHER: you / R=FATHER: you and [MOTHER / J31’s] [MULTIPLE BIRTH: and [J31’s] [and [J31’s]... mother]] wanted to become pregnant?

1. Yes 5. No
OS35. [J31] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
Did you or [R=MOTHER: [FATHER / [J31's [MULTIPLE BIRTH: and [J31’s] [and [J31’s]... father] / R=FATHER: [MOTHER / [J31’s [MULTIPLE BIRTH: and [J31’s] [and [J31’s]... mother]]] ever go to a doctor or other medical care provider to talk about ways to help [R=MOTHER: you / R=FATHER: her] become pregnant with [J31 [MULTIPLE BIRTH: and [J31] [and [J31]]...]?  
1. Yes 5. No

Just before [R=MOTHER: you / R=FATHER: [MOTHER / [J31’s [MULTIPLE BIRTH: and [J31’s] [and [J31’s]... mother]]] became pregnant (with [J31 [MULTIPLE BIRTH: and [J31] [and [J31]]...]), did [R=MOTHER: you yourself / R=FATHER: she herself] want to have a baby?  
1. Yes → GO TO OS63 5. No DK/RF → GO TO OS63

↓

Did [R=MOTHER: you / R=FATHER: she] want a baby but not at that time, or did [R=MOTHER: you / R=FATHER: she] want none or no more at all?  
1. Not at that time 2. None or no more at all 3. Didn’t matter (IF VOL)

And what about [R=MOTHER: [FATHER / [J31’s [MULTIPLE BIRTH: and [J31’s] [and [J31’s]... father] / R=FATHER: you] when [R=MOTHER: you / R=FATHER: [MOTHER / [J31’s [MULTIPLE BIRTH: and [J31’s] [and [J31’s]... mother]]] became pregnant (with [J31 [MULTIPLE BIRTH: and [J31] [and [J31]]...]), did [R=MOTHER: he / R=FATHER: you] want to have a child?  
1. Yes → GO TO OS64 RULE 5. No DK/RF → GO TO OS64 RULE

↓

Did [R=MOTHER: he / R=FATHER: you] want you to have a child but not at that time, or did [R=MOTHER: he / R=FATHER: you] want to have none or no more at all?  
1. Not at that time 2. None or no more at all 3. Didn’t matter (IF VOL)

OS64 RULE: WHETHER MORE CHILDREN LISTED AT J31

MORE CHILDREN → REPEAT OS1-OS63A; MAX=20; NO MORE CHILDREN → GO TO OS64CKPT

End Per Pregnancy Block
Pregnancy Intentions
OS64CKPT. CAl CHECKPOINT: WHETHER R IS MOTHER OR FATHER (RespAQSN=J2[Ans of this J person] or OthParent[Ans of other parent]) OF ANY NEWBORN; ASKED ONCE FOR RESP [& CURRENT SPOUSE/PARTNER]

- R = MOTHER/FATHER OF NEWBORN
- 5. ALL OTHERS \rightarrow GO TO J32CKPT

About R
OS64. Looking to the future, do you yourself want another [R=MOTHER: baby / R=FATHER: child] at some time?
- IF needed: Other than your children already born
  - 1. Yes
  - 5. No
  - 7. Unable to have more children (IF VOL) \text{DK/RF}

GO TO OS66CKPT

↓

OS65. Do you think you probably want or probably do not want to have another [R=MOTHER: baby / R=FATHER: child] at some time in the future?
- If R insists: Don’t know/not sure
  - 1. Probably want
  - 2. Probably do not want

OS66CKPT. CAl CHECKPOINT: WHETHER R HAS CURRENT SPOUSE/PARTNER (R=Head and there is a FU(MI) Wife/"Wife" or Girlfriend; or R=Female Head and there is a FU(MI) Husband of Head or Boyfriend; or R= Wife/"Wife", Girlfriend, Husband of Head or Boyfriend; or R=Ofum who is married)

- 1. CURRENT SPOUSE/PARTNER
- 5. ALL OTHERS \rightarrow GO TO J32CKPT

About Spouse/Partner

- 1. Definitely yes
- 2. Probably yes
- 3. Probably no
- 4. Definitely no

About R [and Spouse/Partner]
OS70. Altogether, how many more [R=MOTHER: babies / R=FATHER: children] do you [CURRENT SPOUSE/PARTNER: and [WIFE/"WIFE" / GIRLFRIEND / HEAD / HUSBAND OF HEAD / BOYFRIEND / your spouse]] intend to have?

- ENTER number of (babies/children)
- ENTER [95] for “None”
- Do not probe DK
- Includes current pregnancy
- Does not include intended adoptions or stepchildren
- If needed: “Intend” refers to what you [CURRENT SPOUSE/PARTNER: and [WIFE/"WIFE" / GIRLFRIEND / HEAD / HUSBAND OF HEAD / BOYFRIEND / your spouse]] are actually going to try to do

- 1 - 94
- 95. None

End Pregnancy Intention

End Own Kids
Adopted Kids
J32CKPT. CAI CHECKPOINT: WHETHER FU MEMBER IS ELIGIBLE FOR ADOPTED KID SECTION; TYPE A (J1CKPT=1), TYPE B (J1CKPT=3-4), TYPE C1 (J1CKPT=6-9), TYPE C2 (J1CKPT=11-14)

1. TYPE A 
2. TYPES B1, B2 
3. TYPES C1, C2: OFUM 
4. TYPES C1, C2: H/W/"W"

NO MORE SECTION J FOR THIS PERSON 

J33. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
[Have / Has] [you or your wife / you or HEAD / HEAD or WIFE/WIFE" / you / your wife / HEAD / WIFE/"WIFE"] legally adopted any children since January [P2YEAR]?

1. Yes 
5. No  → GO TO J1END RULE

GO TO J35

J34. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
[Have / Has] [you / your wife / HEAD / WIFE/"WIFE"] ever legally adopted any children?

1. Yes 
5. No  → GO TO J1END RULE

GO TO J35

J35. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
[TYPES A, B1-B2: How many is that? / TYPES C1A-D, C2A-D: How many altogether?]

1 – 20

J36. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
What is the [first / next] child’s name, including middle and last names?

• ENTER First Name

String 25

J36NamM. CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
(What is the [first / next] child’s name, including middle and last names?)

• ENTER Middle Name

• If none, PRESS [Enter] to continue

String 25
J36NamL. CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
(What is the [first / next] child’s name, including middle and last names?)
  • ENTER Last Name
  String 25

AS1 RULE: NUMBER OF CHILDREN LISTED AT J35

<table>
<thead>
<tr>
<th>MORE CHILDREN</th>
<th>→ REPEAT J36; MAX=20; ALL OTHERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>THEN GO TO AS1</td>
<td></td>
</tr>
</tbody>
</table>

AS1. [J36] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
Let’s talk about [J36]. (We can’t always tell from a name. Is that a male or a female?)
1. Male 2. Female

AS2MO. [J36] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
What is [J36]’s full birthdate?
  • SELECT Month
  • IF NECESSARY: What would be your best estimate?

<table>
<thead>
<tr>
<th>January</th>
<th>February</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
</tr>
</thead>
</table>

AS2DY. [J36] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
(What is [J36]’s full birthdate?)
The month entered is: [AS2MO]
  • ENTER day
1 – 31

AS2YR. [J36] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
The month entered is: [AS2MO]
(What is [J36]’s full birthdate?)
  • ENTER the year below
1901- [CYEAR] Actual year
9996 [P2YEAR]-[CYEAR], DK which year
9997 Before [P2YEAR], DK exact year

AS3. [J36] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
What was [his / her] relationship to [you and your wife / you and HEAD/WIFE/”WIFE” / HEAD and WIFE/”WIFE” / you / your wife / HEAD / WIFE/”WIFE”] before the adoption?

<p>| | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>96. None</td>
<td>301. Son</td>
<td>302. Daughter</td>
<td>331. Stepson</td>
</tr>
<tr>
<td>381. Foster son</td>
<td>382. Foster daughter</td>
<td>401. Brother</td>
<td>402. Sister</td>
</tr>
<tr>
<td>950. Relative of Head</td>
<td>960. Relative of Wife</td>
<td>970. Relative of co-habitor</td>
<td></td>
</tr>
</tbody>
</table>

AS4TOWN. [J36] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
Where was [he / she] born?
- ENTER Town and go to next screen for State
- For Don’t Know, ENTER [Ctrl D]
- For Refusal, ENTER [Ctrl R]

String 25

AS4STATE. [J36] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
What is the State?
[AS4TOWN]
- Start typing the name of the State to bring up the look-up list
- For foreign country birth, ENTER [FOR] to select “Foreign Country” from the state list State

String 30; State Lookup List. State → GO TO SS5 Foreign Country DK/RF → GO TO SS5

↓

AS4COUNTRY. [J36] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
What is the Country?
[AS4TOWN], [AS4STATE]
- Start typing the name of the Foreign Country to bring up the look-up list

String 25; Country Lookup List

ASS. [J36] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
Is [J36] 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 now
2. Living with father elsewhere
3. Living with mother elsewhere
4. Living with other relative elsewhere
5. Set up a separate household
6. Deceased
7. Other-specify (ASSSPEC. Specify (String 100))

GO TO AS7
AS6MO. [J36] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
In what month and year did [he / she] die?
• SELECT Month and [Enter] to go to next screen for year
• IF NECESSARY: What would be your best estimate?

|-------|------------|-------------|----------|----------|--------|---------|

AS6YR. [J36] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
The month entered is: [AS6MO]
• ENTER the year below
1901- [CYEAR] Actual year
9996 [P2YEAR]-[CYEAR], DK which year
9997 Before [P2YEAR], DK exact year

|------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

AS7. [J36] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
Is [he / she] Spanish, Hispanic, or Latino? That is, Mexican, Mexican American, Chicano, Puerto Rican, Cuban, or other Spanish?

4. Puerto Rican 5. Cuban 7. Other-specify (AS7SPEC. Specify (String 100))

AS8. [J36] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
What is [his / her] race? Is [he / she] white, black, American Indian, Alaska Native, Asian, Native Hawaiian, or Pacific Islander?
• ENTER all that apply
• PROBE: Any others?

3. American Indian or Alaska Native 5. Native Hawaiian
6. Pacific Islander 7. Other-specify (AS8SPEC. Specify (String 100))

GO TO AS10 RULE

AS8A. [J36] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
Would that be Chinese, Filipino, Asian Indian, or what?

7. Other Asian-specify (AS8ASPEC. Specify (String 100))

AS10 RULE: WHETHER MORE CHILDREN LISTED AT J36

MORE CHILDREN ⇒ REPEAT AS1-AS8A; MAX=24; ALL OTHERS

End Adopted Kids
### J1-END RULE: WHETHER THERE ARE MORE ELIGIBLE FU MEMBERS

<table>
<thead>
<tr>
<th>MORE FU MEMBERS</th>
<th>→ REPEAT J1- AS8A; MAX=24; ALL OTHERS</th>
<th>THEN GO TO SECTION KL</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>↓</td>
</tr>
</tbody>
</table>
Section KL: Background; H/W/"W"Education

Back to TOC

LOOP 1 WIFE/"WIFE" IF ONE IN FU
LOOP 2 HEAD

KL1CKPT. CAI CHECKPOINT: WHETHER NEW OR SAME WIFE/"WIFE"/HEAD IN FU

NEW WIFE/"WIFE": (IWTYPE=REINT AND ((CYFUHU=1 & CYAQRTH=202,222 & PYAQRTH<>101,102,202,222) OR (CYFUHU=4 & CYAQRTH=202,222)) OR (IWTYPE=SO, RECON, RECSO & CYFUHU=1,4 & CYAQRTH=202,222))
NEW HEAD: (IWTYPE=REINT & ((CYFUHU=1 & CYAQRTH=101,102 & PYAQRTH<>101,102,202,222) OR (CYFUHU=4 & CYAQRTH=101,102)) OR (IWTYPE=SO, RECON, RECSO & CYFUHU=1,4 & CYAQRTH=101,102))
SAME WIFE/"WIFE": IWTYPE=REINT AND (CYFUHU=1 & CYAQRTH=202,222 & PYAQRTH=101,102,202,222)
SAME HEAD: IWTYPE=REINT & (CYFUHU=1 & CYAQRTH=101,102 & PYAQRTH=101,102,202,222)

<table>
<thead>
<tr>
<th>1. NEW WIFE/&quot;WIFE&quot;</th>
<th>2. NEW HEAD</th>
<th>3. SAME WIFE/&quot;WIFE&quot;</th>
<th>4. SAME HEAD</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO KL3CITY</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

KL2CITY. [CYAQRTH, CYNAMF CYNAML]
Now I have some questions about [your / your wife's / WIFE's /"WIFE's" / your husband's / HEAD's] family and past experiences. Where was [your / her / his] father born?
- ACCEPT Father substitute
- For Don't Know, ENTER [Ctrl D]
- For Refusal, ENTER [Ctrl R]

String 25

KL2STATE. [CYAQRTH, CYNAMF CYNAML]
(What State is that in?)

[KL2CITY]
- Start typing the name of the State to bring up the look-up list
- IF foreign country, ENTER [FOR] to select "Foreign Country"

String 30; State Lookup List. State → GO TO KL3CITY Foreign Country DK/RF → GO KL3CITY

↓

KL2COUNTRY. [CYAQRTH, CYNAMF CYNAML]
(What Country is that in?)

[KL2CITY], [KL2STATE]
- Start typing the name of the Foreign Country to bring up the look-up list

String 25; Country Lookup List

KL3CITY. [CYAQRTH, CYNAMF CYNAML]
Where did [your / her / his] father grow up?
- Most of the years from ages 6 to 16
- For Don't Know, ENTER [Ctrl D]
- For Refusal, ENTER [Ctrl R]

String 25
KL3STATE. [CYAQRTH, CYNAMF CYNAML]
(What State is that in?)
[KL3CITY]
- Start typing the name of the State to bring up the look-up list
- If foreign country, enter [FOR] to select “Foreign Country”

String 30; State Lookup List. State → GO TO KL4  Foreign Country DK/RF → GO KL4

KL3COUNTRY. [CYAQRTH, CYNAMF CYNAML]
(What Country is that in?)
[KL3CITY], [KL3STATE]
- Start typing the name of the Foreign Country to bring up the look-up list

String 25; Country Lookup List

KL4. [CYAQRTH, CYNAMF CYNAML]
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  5. Had no education
KL4 SOFT CHECK FOR KL4=DK:

KL5. [CYAQRTH, CYNAMF CYNAML]
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
6. 13 – 14 years; Some college; Associate’s Degree
7. 15 – 16 years; College; Bachelor’s Degree
8. 17 or more years; College; Graduate work; Ph.D, Professional degree

KL5 SOFT CHECK FOR KL5=DK:

KL6. [CYAQRTH, CYNAMF CYNAML]
Could he read and write (in English)?
1. Yes  5. No

KL7CKPT. CAI CHECKPOINT: WHETHER EDUCATED OUTSIDE U.S. (KL4=2, 3)

GO TO KL7CKPT  → GO TO KL10

GO TO KL10
KL8. [CYAQRTH, CYNAMF CYNAML]
   How many years of school did he complete outside of the U.S.?
   1 – 25

KL9. [CYAQRTH, CYNAMF CYNAML]
   What was the highest degree or certificate he earned outside the U.S.?
   String 100

KL10. [CYAQRTH, CYNAMF CYNAML]
   What was [your / her / his] father’s usual occupation when [you / she / he] [were / was] growing up? What kind of work did he do? What were his most important activities or duties?
   String 500

KL11. [CYAQRTH, CYNAMF CYNAML]
   What kind of business or industry was that in?
   String 500

KL12CITY. [CYAQRTH, CYNAMF CYNAML YNAML]
   These next questions are about [your / your wife’s / WIFE’s /"WIFE’s" / your husband’s / HEAD’s] mother. Where was [your / her / his] mother born?
   • ACCEPT Mother substitute
   • For Don’t Know, ENTER [Ctrl D]
   • For Refusal, ENTER [Ctrl R]
   String 25

KL12STATE. [CYAQRTH, CYNAMF CYNAML]
   (What State is that in?)
   [KL12CITY]
   • Start typing the name of the State to bring up the look-up list
   • IF foreign country, ENTER [FOR] to select “Foreign Country”
   String 30; State Lookup List. State → GO TO KL13CITY Foreign Country DK/RF → GO KL13CITY

KL12COUNTRY. [CYAQRTH, CYNAMF CYNAML]
   (What Country is that in?)
   [KL12CITY, KL12STATE]
   • Start typing the name of the Foreign Country to bring up the look-up list
   String 25; Country Lookup List

KL13CITY. [CYAQRTH, CYNAMF CYNAML]
   Where did [your / her / his] mother grow up?
   • Most of the years from ages 6 to 16
   • For Don’t Know, ENTER [Ctrl D]
   • For Refusal, ENTER [Ctrl R]
   String 25
KL13STATE. [CYAQRTH, CYNAMF CYNAML]
(What State is that in?)
[KL13CITY]
• Start typing the name of the State to bring up the look-up list
• IF foreign country, ENTER [FOR] to select “Foreign Country”

String 30; State Lookup List. State → GO TO KL14 Foreign Country DK/RF → GO KL14

KL13COUNTRY. [CYAQRTH, CYNAMF CYNAML]
(What Country is that in?)
[KL13CITY, KL13STATE]
• Start typing the name of the Foreign Country to bring up the look-up list

String 25; Country Lookup List

KL14. [CYAQRTH, CYNAMF CYNAML]
Where did [your / her / his] mother 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 DK 5. Had no education RF

GO TO KL17CKPT

KL15. [CYAQRTH, CYNAMF CYNAML]
How much education did [your / her / his] mother 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
6. 13 – 14 years; Some college; Associate’s Degree
7. 15 – 16 years; College; Bachelor’s Degree
8. 17 or more years; College; Graduate work; Ph.D, Professional degree DK/RF

GO TO KL17CKPT

KL15 SOFT CHECK. What is your best estimate, would you say...
• Read code list below

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, 8. 17 or more years - a graduate degree, Ph.D, or professional degree?

KL16. [CYAQRTH, CYNAMF CYNAML]
Could she read and write (in English)?
1. Yes 5. No

KL17CKPT. CAI CHECKPOINT: WHETHER EDUCATED OUTSIDE U.S. (KL14=2, 3)
1. EDUCATED OUTSIDE U.S. 5. ALL OTHERS → GO TO KL20

↓
KL18. [CYAQRTH, CYNAMF CYNAML]
How many years of school did she complete outside of the U.S.?
1 – 25

KL19. [CYAQRTH, CYNAMF CYNAML]
What was the highest degree or certificate she earned outside the U.S.?
String 100

KL20. [CYAQRTH, CYNAMF CYNAML]
What was [your / her / his] mother’s usual occupation when [you / she / he] [were / was] growing up? What kind of work did she do? What were her most important activities or duties?
String 500

KL21. [CYAQRTH, CYNAMF CYNAML]
What kind of business or industry was that in?
String 500

KL22. [CYAQRTH, CYNAMF CYNAML]
Now I have some questions about brothers and sisters. Did [you / your wife / WIFE/“WIFE” / your husband / HEAD] have any brothers?
- INCLUDE natural siblings only
1. Yes  5. No → GO TO KL28
↓
KL23. [CYAQRTH, CYNAMF CYNAML]
How many brothers was that?
1  2 – 25  DK/RF → GO TO KL28
↓

KL24. [CYAQRTH, CYNAMF CYNAML]
Is [he / her / his] brother still living?
1. Yes  5. No

KL25. [CYAQRTH, CYNAMF CYNAML]
[Is / Was] he older than [you / your wife / WIFE/“WIFE” / your husband / HEAD]?
1. Yes  5. No

KL26. [CYAQRTH, CYNAMF CYNAML]
How many of them are still living?
0 – [KL23 (25)]

KL27. [CYAQRTH, CYNAMF CYNAML]
[Are / Were] any of [your / her / his] brothers older than [you are / [she / he] is]?
1. Yes  5. No

KL28. [CYAQRTH, CYNAMF CYNAML]
Did [you / your wife / WIFE/“WIFE” / your husband / HEAD] have any sisters?
- INCLUDE natural siblings only
1. Yes  5. No → GO TO KL33CITY
↓
KL29. [CYAQRTH, CYNAMF CYNAML]
How many sisters was that?

1

2 – 25 DK/RF → GO TO KL33CITY

KL30. [CYAQRTH, CYNAMF CYNAML]
Is [she / her / his] sister still living?

1. Yes 5. No

KL31. [CYAQRTH, CYNAMF CYNAML]
[Is / Was] she older than [you / your wife / WIFE/"WIFE” / your husband / HEAD]?

1. Yes 5. No

KL32. [CYAQRTH, CYNAMF CYNAML]
How many of them are still living?

0 – [KL28 (25)]

KL33. [CYAQRTH, CYNAMF CYNAML]
[Are / Were] any of [your / her / his] sisters older than [you are [she / he] is]?

1. Yes 5. No

KL33CITY. [CYAQRTH, CYNAMF CYNAML YNAML]
[SAME W/"W”/H: Now I have some questions about [your / WIFE’s/”WIFE’s” / HEAD’s] family and past experiences.]
Where [were / was] [you / WIFE/”WIFE” / HEAD] born?

• For Don’t Know, ENTER [Ctrl D]
• For Refusal, ENTER [Ctrl R]

String 25

KL33STATE. [CYAQRTH, CYNAMF CYNAML]
(What State is that in?)

[KL33CITY]

• Start typing the name of the State to bring up the look-up list
• IF foreign country, ENTER [FOR] to select “Foreign Country”

String 30; State Lookup List. State → GO TO KL34 RULE Foreign Country DK/RF

KL33COUNTRY. [CYAQRTH, CYNAMF CYNAML]
(What Country is that?)

[KL33CITY, KL33STATE]

• Start typing the name of the Foreign Country to bring up the look-up list

String 25; Country Lookup List. United States → GO TO KL34 RULE Foreign Country DK/RF

KL33YEAR. [CYAQRTH, CYNAMF CYNAML]
When did [you / she / he] come to live in the United States?

[KL33CITY, KL33COUNTRY]

• ENTER Year
• ENTER [9997] if not living in the United States
• If needed, PROBE for the most recent time [WIFE/”WIFE”/HEAD] came to live in the U.S.

1901 – [CYEAR] 9997. Not living in United States
KL34 RULE: WHETHER NEW OR SAME WIFE/“WIFE”/HEAD IN FU (KL1CKPT)

NEW WIFE/“WIFE” NEW HEAD SAME WIFE/“WIFE” SAME HEAD

↓ GO TO KL73 RULE

KL34. [CYAQRTH, CYANMF CYNAML]
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 (KL34SPEC. Specify (String 100))

KL35STATE. [CYAQRTH, CYANMF CYNAML]
In what State (of the U.S.) was that?
• Start typing the name of the State to bring up the look-up list
• IF foreign country, ENTER [FOR] to select “Foreign Country”

String 30; State Lookup List. State

↓

KL35COUNTY. [CYAQRTH, CYANMF CYNAML]
Can you tell me what County that was?
• For Don’t Know, ENTER [Ctrl D]
• For Refusal, ENTER [Ctrl R]

String 25 → GO TO KL36 D K/R

↓

KL35CITY. [CYAQRTH, CYANMF CYNAML]
What was the name of the nearest town or city?
• For Don’t Know, ENTER [Ctrl D]
• For Refusal, ENTER [Ctrl R]

String 25

KL36. [CYAQRTH, CYANMF CYNAML]
[Have / Has] [you / WIFE/“WIFE” / HEAD] lived in any other states or countries besides where [you are / [he / she] 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

KL37. [CYAQRTH, CYANMF CYNAML]
Were [your / WIFE’s/“WIFE’s” / HEAD’s] parents poor when [you were / [she / he] was] growing up, pretty well off, or what?
1. Poor 3. Average; it varied 5. Pretty well off

KL38. [CYAQRTH, CYANMF CYNAML]
Were you / Was [she / he]] living with both [your / her / his] natural parents most of the time until [you were / [she / he] was] age 16?
1. Yes 5. No
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’s / WIFE’s/“WIFE’s”/ your husband’s / HEAD’s] background. [Are you / Is [he / she]] Spanish, Hispanic, or Latino? That is, Mexican, Mexican American, Chicano, Puerto Rican, Cuban, or other Spanish?

4. Puerto Rican 5. Cuban 7. Other-specify (KL39SPEC. Specify (String 100))

What is [your / her / his] race? [Are you / Is [he / she]] white, black, American Indian, Alaska Native, Asian, Native Hawaiian, or Pacific Islander?

- ENTER all that apply
- PROBE: Any others?

3. American Indian or Alaska Native 5. Native Hawaiian
6. Pacific Islander 7. Other-specify (KL40SPEC. Specify (String 100))

Would that be Chinese, Filipino, Asian Indian, or what?

7. Other Asian-specify (KL40ASPEC. Specify (String 100))

What is [your / her / his] ancestry or ethnic origin? From what country or part of the world did [your / her / his] ancestors come from?

- PROBE: Is there a second? (What is it?)
- DO NOT ACCEPT a State in the United States

Have you / Has [she / he]] ever been in the United States military service?

1. Yes 5. No

Where did [you / your wife / WIFE/“WIFE”/ your husband / HEAD] receive [your / her / 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 outsideDK 5. Had no education RF

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?

KL45MO. [CYAQRTH, CYNAMF CYNAML]
In what month and year did [you / she / he] graduate?
- SELECT Month and [Enter] to go to next screen for year
- IF NECESSARY: What would be your best estimate?

<table>
<thead>
<tr>
<th>Month</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. January</td>
<td>2. February</td>
</tr>
<tr>
<td>3. March</td>
<td>4. April</td>
</tr>
<tr>
<td>5. May</td>
<td>6. June</td>
</tr>
<tr>
<td>7. July</td>
<td>8. August</td>
</tr>
<tr>
<td>9. September</td>
<td>10. October</td>
</tr>
<tr>
<td>11. November</td>
<td>12. December</td>
</tr>
<tr>
<td>21. Winter</td>
<td>22. Spring</td>
</tr>
<tr>
<td>23. Summer</td>
<td>24. Fall</td>
</tr>
</tbody>
</table>

KL45YR. [CYAQRTH, CYNAMF CYNAML]
The month entered is: [KL45MO]
- ENTER the year below

1901 – [CYEAR]
GO TO KL51

KL46. [CYAQRTH, CYNAMF CYNAML]
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

<table>
<thead>
<tr>
<th>Grade</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>0. None</td>
<td></td>
</tr>
<tr>
<td>1. First grade</td>
<td>2. Second grade</td>
</tr>
<tr>
<td>3. Third grade</td>
<td>4. Fourth grade</td>
</tr>
<tr>
<td>5. Fifth grade</td>
<td>6. Sixth grade</td>
</tr>
<tr>
<td>7. Seventh grade</td>
<td>8. Eighth grade</td>
</tr>
<tr>
<td>9. Ninth grade</td>
<td>10. Tenth grade</td>
</tr>
<tr>
<td>11. Eleventh grade</td>
<td></td>
</tr>
<tr>
<td></td>
<td>DK/RF</td>
</tr>
</tbody>
</table>

↓
GO TO KL48MO

KL47MO. [CYAQRTH, CYNAMF CYNAML]
In what month and year did [you / she / he] last attend [KL46]?
- SELECT Month and [Enter] to go to next screen for year
- IF NECESSARY: What would be your best estimate?

<table>
<thead>
<tr>
<th>Month</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. January</td>
<td>2. February</td>
</tr>
<tr>
<td>3. March</td>
<td>4. April</td>
</tr>
<tr>
<td>5. May</td>
<td>6. June</td>
</tr>
<tr>
<td>7. July</td>
<td>8. August</td>
</tr>
<tr>
<td>9. September</td>
<td>10. October</td>
</tr>
<tr>
<td>11. November</td>
<td>12. December</td>
</tr>
<tr>
<td>21. Winter</td>
<td>22. Spring</td>
</tr>
<tr>
<td>23. Summer</td>
<td>24. Fall</td>
</tr>
</tbody>
</table>

KL47YR. [CYAQRTH, CYNAMF CYNAML]
The month entered is: [KL47MO]
- ENTER the year below

1901 – [CYEAR]

KL48MO. [CYAQRTH, CYNAMF CYNAML]
In what month and year did [you / she / he] receive [your / her / his] GED?
- SELECT Month and [Enter] to go to next screen for year
- IF NECESSARY: What would be your best estimate?

<table>
<thead>
<tr>
<th>Month</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. January</td>
<td>2. February</td>
</tr>
<tr>
<td>3. March</td>
<td>4. April</td>
</tr>
<tr>
<td>5. May</td>
<td>6. June</td>
</tr>
<tr>
<td>7. July</td>
<td>8. August</td>
</tr>
<tr>
<td>9. September</td>
<td>10. October</td>
</tr>
<tr>
<td>11. November</td>
<td>12. December</td>
</tr>
<tr>
<td>21. Winter</td>
<td>22. Spring</td>
</tr>
<tr>
<td>23. Summer</td>
<td>24. Fall</td>
</tr>
</tbody>
</table>
**KL48YR. [CYAQRTH, CYNAMF CYNAML]**

The month entered is: [KL48MO]
- ENTER the year below

[1901 – [CYEAR]]

GO TO KL51

---

**KL49. [CYAQRTH, CYNAMF CYNAML]**

How many grades of school did [you / she / he] finish?
- Record last grade finished

<table>
<thead>
<tr>
<th>Grade</th>
<th>0. None</th>
<th>1. First grade</th>
<th>2. Second grade</th>
<th>3. Third grade</th>
<th>4. Fourth grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>5. Fifth grade</td>
<td>6. Sixth grade</td>
<td>7. Seventh grade</td>
<td>8. Eighth grade</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

GO TO KL51

---

**KL50MO. [CYAQRTH, CYNAMF CYNAML]**

In month and what year did [you / she / he] last attend [KL49]?
- SELECT Month and [Enter] to go to next screen for year
- IF NECESSARY: What would be your best estimate?

|-------------|------------|-------------|----------|----------|--------|---------|

GO TO KL51

---

**KL50YR. [CYAQRTH, CYNAMF CYNAML]**

The month entered is: [KL50MO]
- ENTER the year below

[1901 – [CYEAR]]

---

**KL51. [CYAQRTH, CYNAMF CYNAML]**

Did [you / she / he] attend college?

1. Yes 5. No  → GO TO KL59CKPT

↓

**KL52MO. [CYAQRTH, CYNAMF CYNAML]**

In what month and year did [you / she / he] last attend college?
- If still in school, ENTER [96] for month
- SELECT Month and [Enter] to go to next screen for year
- IF NECESSARY: What would be your best estimate?

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>96. Still in school</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>DK/RF</td>
<td>GO TO KL53</td>
</tr>
</tbody>
</table>

↓

**KL53. [CYAQRTH, CYNAMF CYNAML]**

Go to the next screen to continue.
KL52YR. [CYAQRTH, CYANMF CYNAML]
The month entered is: [KL52MO]
  • ENTER the year below
  9996  If still in school
     1901 – [CYEAR] 9996. Still in school

KL53. [CYAQRTH, CYANMF CYNAML]
What is the highest year of college [you / he / she] [have / has] completed?
  • IF R gives a degree: How many years of college [have / has] [you / she / he] completed? We'll talk about any college degrees [you / he / she] [have / has] earned next.
     0. Less than one year  1. One year  2. Two years  3. Three years  4. Four years  5. Five years or more
     GO TO KL59CKPT

KL54. [CYAQRTH, CYANMF CYNAML]
Did [you / she / he] receive a college degree?
  1. Yes  5. No  → GO TO KL59CKPT

KL55. [CYAQRTH, CYANMF CYNAML]
What is the highest college degree [you / he / she] [have / has] received?
  1. Associate’s degree/AA
  2. Bachelor’s degree/BA/BS
  3. Master’s degree/MA/MS/MBA
  4. Doctorate/PhD
  5. LLB, JD (Law degrees)
  6. MD, DDS, DVM, DO (Medical degrees)
  8. Honorary degree
  97. Other-specify (KL55SPEC. Specify (String 100))

KL56. [CYAQRTH, CYANMF CYNAML]
What was the name of the college?
  • IF NEEDED: What is the name of the college from which [you / she / he] received [your / her / his] highest degree?
    String 100

KL57. [CYAQRTH, CYANMF CYNAML]
Where was it located?
  • IF NEEDED: Where is the college from which [you / she / he] received [your / her / his] highest degree?
    String 100

KL58MO. [CYAQRTH, CYANMF CYNAML]
In what month and year did [you / she / he] receive that degree?
  • IF NEEDED: When did [you / she / he] receive [your / her / his] highest degree?
  • SELECT Month and [Enter] to go to next screen for year
  • IF NECESSARY: What would be your best estimate?
KL58YR. [CYAQRTH, CYNAMF CYNAML]
The month entered is: [KL58MO]
- ENTER the year below

1901 – [CYEAR]

KL59CKPT. CAI CHECKPOINT: WHETHER EDUCATED OUTSIDE U.S. (KL43=2, 3)

1. EDUCATED OUTSIDE U.S.  5. ALL OTHERS  → GO TO KL62

↓

KL60. [CYAQRTH, CYNAMF CYNAML]
How many years of school did [you / she / he] complete outside of the U.S.?

1 – 25

KL61. [CYAQRTH, CYNAMF CYNAML]
What was the highest degree or certificate [you / she / he] earned outside the U.S.?

String 100

KL62. [CYAQRTH, CYNAMF CYNAML]
Did [you / she / he] receive any other degree or a certificate through a vocational school, a training school, or an apprenticeship program?
- IWER: This includes vocational training received in the military and military occupational specialties (MOS)

1. Yes  5. No  → GO TO KL68

↓

KL63. [CYAQRTH, CYNAMF CYNAML]
What type of degree or certificate was that?


7. Other-specify (KL63SPEC. Specify (String 100))

KL64. [CYAQRTH, CYNAMF CYNAML]
In what field was that?

String 100

KL65. [CYAQRTH, CYNAMF CYNAML]
From what type of institution or organization was that?

1. Vocational/Trade school
2. Community/Junior college
3. Business/Secretarial school
4. Armed Forces
5. High school
6. Hospital/Health Care facility or school
7. Cosmetology/Beauty/Barber school
8. Police/Firefighter training program
9. Job training through government; except code 8
10. Training by private employer
11. Religious Institution or Bible College/School
97. Other-specify (KL65SPEC. Specify (String 100))
**KL66MO. [CYAQRTH, CYNAMF CYNAML]**

In what month and year did [you / she / he] receive that degree or certificate?

- SELECT Month and [Enter] to go to next screen for year
- IF NECESSARY: What would be your best estimate?

<table>
<thead>
<tr>
<th>Month</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>January</td>
<td>1</td>
</tr>
<tr>
<td>February</td>
<td>2</td>
</tr>
<tr>
<td>March</td>
<td>3</td>
</tr>
<tr>
<td>April</td>
<td>4</td>
</tr>
<tr>
<td>May</td>
<td>5</td>
</tr>
<tr>
<td>June</td>
<td>6</td>
</tr>
<tr>
<td>July</td>
<td>7</td>
</tr>
<tr>
<td>August</td>
<td>8</td>
</tr>
<tr>
<td>September</td>
<td>9</td>
</tr>
<tr>
<td>October</td>
<td>10</td>
</tr>
<tr>
<td>November</td>
<td>11</td>
</tr>
<tr>
<td>December</td>
<td>12</td>
</tr>
<tr>
<td>Winter</td>
<td>21</td>
</tr>
<tr>
<td>Spring</td>
<td>22</td>
</tr>
<tr>
<td>Summer</td>
<td>23</td>
</tr>
<tr>
<td>Fall</td>
<td>24</td>
</tr>
</tbody>
</table>

**KL66YR. [CYAQRTH, CYNAMF CYNAML]**

The month entered is: [KL66MO]

- ENTER the year below

1901 – [CYEAR]

**KL67. [CYAQRTH, CYNAMF CYNAML]**

Did [you / she / he] receive any other training degree or certificate?

- This includes vocational training received in the military and military occupational specialties (MOS)

1. Yes → REPEAT KL63-KL67; THEN GO TO KL68
5. No

**KL68. [CYAQRTH, CYNAMF CYNAML]**

What is [your / your wife’s / WIFE’s / your husband’s / HEAD’s] religious preference?

- IF answer is generic, such as “Christian” or “Protestant”, PROBE: What denomination is that?

<table>
<thead>
<tr>
<th>Denomination</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>0</td>
</tr>
<tr>
<td>Catholic</td>
<td>1</td>
</tr>
<tr>
<td>Jewish</td>
<td>2</td>
</tr>
<tr>
<td>Protestant</td>
<td>8</td>
</tr>
<tr>
<td>Non-Christian/Muslim/Buddhist</td>
<td>10</td>
</tr>
<tr>
<td>Greek/Russian/Eastern Orthodox</td>
<td>13</td>
</tr>
<tr>
<td>Other-Specify (KL68SPEC. Specify (String 100))</td>
<td>97</td>
</tr>
</tbody>
</table>

GO TO KL70 RULE

**KL69. [CYAQRTH, CYNAMF CYNAML]**

What denomination is that?

<table>
<thead>
<tr>
<th>Denomination</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Baptist</td>
<td>03</td>
</tr>
<tr>
<td>Lutheran</td>
<td>04</td>
</tr>
<tr>
<td>Methodist/ African Methodist</td>
<td>05</td>
</tr>
<tr>
<td>Presbyterian</td>
<td>06</td>
</tr>
<tr>
<td>Episcopal</td>
<td>07</td>
</tr>
<tr>
<td>Jehovah’s Witness</td>
<td>12</td>
</tr>
<tr>
<td>“Christian”</td>
<td>14</td>
</tr>
<tr>
<td>Pentecostal/ Assembly of God</td>
<td>18</td>
</tr>
<tr>
<td>Other-Specify</td>
<td>97</td>
</tr>
</tbody>
</table>

GO TO KL70 RULE

**KL70. [CYAQRTH, CYNAMF CYNAML]**

How many years altogether [have / has] [you / she / he] worked for money since [you / she / he] [were / was] 18?

- FOR none, ENTER [0]
- FOR 1 year or less, ENTER [1]
- FOR all years since 18, ENTER [96]

<table>
<thead>
<tr>
<th>Years Worked</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>→ GO TO KL73 RULE</td>
</tr>
<tr>
<td>1 – [AGEIWDATE minus 18]</td>
<td>96. All years since 18</td>
</tr>
</tbody>
</table>
KL71. [CYAQRTH, CYNAMF CYNAML]
How many of these years did [you / she / he] work full-time for most or all of the year?
- FOR none, ENTER [0]
- FOR 1 year or less, ENTER [1]
- [KL70=96: FOR all years since 18, ENTER [96]

0 → GO TO KL73 RULE
1 → [AGEIWDATE minus 18] [KL70=96: 96. All years since 18] DK/RF

KL72. [CYAQRTH, CYNAMF CYNAML]
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?
Open End

KL73. [CYAQRTH, CYNAMF CYNAML]
What kind of business or industry was that in?
Open End

KL73 RULE. WHETHER NEW WIFE/"WIFE" OR HEAD IN FU (KL1CKPT)

NEW WIFE/"WIFE"  NEW HEAD  → REPEAT KL2CITY – KL73; SAME WIFE/"WIFE"  SAME HEAD  THEN GO TO GO TO PARENT ROSTER TRANSFER
  GO TO PARENT ROSTER TRANSFER

KL74. [CYAQRTH, CYNAMF CYNAML]
(Now I would like to talk about the education [you / WIFE/"WIFE" / HEAD] [have / has] received.)

1. Yes 2. Still in school (IF VOL) 5. No → GO TO KL84CKPT

KL75. [CYAQRTH, CYNAMF CYNAML]
What is the highest grade or year of school that [you / she / he] [have / has] completed (since our [NEWLAST=1 NEW IN 2011: last interview on [PYIWDATE] / NEWLAST=1 NEW IN 2011 & PYIWDATE=NONRESPONSE: last interview in 2011 / NEWLAST=5 RETURNING IN 2011: interview on [DATE09] / NEWLAST=5 RETURNING IN 2011 & DATE09=NONRESPONSE: interview in 2009])?

0. None 1. First grade 13. Less than one year college
2. Second grade 3. Third grade 14. One year college
4. Fourth grade 5. Fifth grade 15. Two years college
6. Sixth grade 7. Seventh grade 16. Three years college
8. Eighth grade 9. Ninth grade 17. Four years college
19. College graduate

DK/RF

GO TO KL84CKPT  → GO TO KL79

GO TO KL79
KL76. [CYAQRTH, CYNAMF CYNAML]
Did [you / she / he] graduate from high school, get a GED, or neither (since our [NEWLAST=1 NEW IN 2011: last interview on [PYIWDATE] / NEWLAST=1 NEW IN 2011 & PYIWDATE=NONRESPONSE: last interview in 2011 / NEWLAST=5 RETURNING IN 2011: interview on [DATE09] / NEWLAST=5 RETURNING IN 2011 & DATE09=NONRESPONSE: interview in 2009])?

1. Graduated from high school
2. Got a GED → GO TO KL78MO
3. Neither ∨ DK/RF

↓

GO TO KL84CKPT

KL77MO. [CYAQRTH, CYNAMF CYNAML]

- SELECT Month and [Enter] to go to next screen for year
- If necessary: What would be your best


KL77YR. [CYAQRTH, CYNAMF CYNAML]

- The month entered is: [KL77MO]
- ENTER the year below

2009/2011 – [CYEAR] → GO TO KL84CKPT

KL78MO. [CYAQRTH, CYNAMF CYNAML]

- SELECT Month and [Enter] to go to next screen for year
- If necessary: What would be your best


KL78YR. [CYAQRTH, CYNAMF CYNAML]

- The month entered is: [KL78MO]
- ENTER the year below

2009/2011 – [CYEAR] → GO TO KL84CKPT
KL79. [CYAQRTH, CYNAMF CYNAML]
Did [you / she / he] receive a college degree since our [NEWLAST=1 NEW IN 2011: last interview on [PYIWDATE] / NEWLAST=1 NEW IN 2011 & PYIWDATE=NORESPONSE: last interview in 2011 / NEWLAST=5 RETURNING IN 2011: interview on [DATE09] / NEWLAST=5 RETURNING IN 2011 & DATE09=NORESPONSE: interview in 2009]? If Yes: What is the highest college degree [you / she / he] received?
• ENTER [0] for “No did not receive a college degree”

0. Did not receive degree → GO TO KL84CKPT
1. Associate’s degree/AA
2. Bachelor’s degree/BA/BS
3. Master’s degree/MA/MS/MBA
4. Doctorate/PhD
5. LLB, JD (Law degrees)
6. MD, DDS, DVM, DO (Medical degrees)
7. Honorary degree
8. Other-specify (KL79SPEC. Specify (String 100))
97. Other- specify (String 100)
DK/RF → GO TO KL84CKPT

KL80MO. [CYAQRTH, CYNAMF CYNAML]
• SELECT Month and [Enter] to go to next screen for year
• If neccesary: In what year did [you / she / he] receive that degree ([your / her / his] highest degree)?

KL80YR. [CYAQRTH, CYNAMF CYNAML]
• The month entered is: [KL80MO]
• ENTER the year below

KL81. [CYAQRTH, CYNAMF CYNAML]
What was the name of the college or university?
• If needed: What is the name of the college or university from which [you / she / he] received [your / her / his] highest degree?

KL82CITY. [CYAQRTH, CYNAMF CYNAML]
Where is it located?
[KL81]
• If needed: In what city and state is the college or university from which [you / she / he] received [your / her / his] highest degree?
KL82STATE. [CYAQRTH, CYNAMF CYNAML]
(In what state is the college or university from which [you / she / he] received [your / her / his] highest degree?)

[KL81] [KL82CITY]
- Start typing the name of the State to bring up the look-up list
- IF foreign country, ENTER [FOR] to select “Foreign Country”

String 30; State Lookup List. State → GO TO KL83

Foreign Country DK/RF → GO KL83

↓

KL82COUNTRY. [CYAQRTH, CYNAMF CYNAML]
(In what country was the college or university from which [you / she / he] received [your / her / his] highest degree?)

[KL81] [KL82CITY] [KL82STATE]
- Start typing the name of the Foreign Country to bring up the look-up list

String 25; Country Lookup List

KL83. [CYAQRTH, CYNAMF CYNAML]
What was [your / her / his] [KL79=BACHELORS: major / ALL OTHERS: area of study] (at this college or university) (from which [you / he / she] received [your / his / her] highest degree)?
- Probe for details and dual majors

String 100

KL84CKPT. WHETHER KL74 IS STILL IN SCHOOL (KL74=2)

1. STILL IN SCHOOL → GO TO KL85
5. ALL OTHERS

↓

KL84. [CYAQRTH, CYNAMF CYNAML]
[Are / Is] [you / she / he] attending or enrolled in regular school? (Regular school includes high school and schooling that leads to a college or professional school degree.)

1. Yes 5. No → GO TO SECTION

↓

KL85. [CYAQRTH, CYNAMF CYNAML]
[STILL IN SCHOOL: Earlier you said [you / WIFE/"WIFE"/HEAD] [are / is] still in school.]
What grade or year [are / is] [you / she / he] attending?

14. 2nd year college (sophomore) 15. 3rd year college (junior) 16. 4th year college (senior)
17. 5th or higher year of college 18. 1st year graduate school 19. 2nd year graduate school
20. 3rd year or higher graduate school 21. College, no year reported
**RULE:** WHETHER HEAD IS NEW

<table>
<thead>
<tr>
<th>SAME HEAD</th>
<th>→ REPEAT KL74 – KL85;</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALL OTHERS</td>
<td>THEN GO TO PARENT ROSTER TRANSFER</td>
</tr>
</tbody>
</table>
Parent: Roster and Transfers

Back to TOC

Parent Roster
WHICHPARENTCKPT. WHETHER R/HEAD OR SPOUSE/PARTNER/WIFE/"WIFE" IS >= 80 YEARS OLD

- 1. R/HEAD ONLY & R/HEAD >= 80 YRS OLD; OR R/HEAD + SPOUSE/PARTNER/WIFE/"WIFE" AND BOTH >= 80 YRS OLD
   → GO TO PRSIBCKPT
- 5. ALL OTHERS

SAQSN[1]: AQSN OF R/HEAD
SAQSN[2]: AQSN OF SPOUSE/PARTNER/WIFE/"WIFE"

WHICH PARENT. [LOOP 1 SUBLOOP 1 ONLY: Next we have a few questions about help to and from family.]
Is [your/HEAD’s / SPOUSE’s/PARTNER’s / WIFE’s/"WIFE’s"] biological or adoptive [SUBLOOP 1: father / SUBLOOP 2: mother] alive? If Yes: What is [SUBLOOP 1: his / SUBLOOP 2: her] name?
- ENTER code for [father / mother] listed below or ENTER [4] to add [father / mother] not listed
- If BOTH bio and adoptive [father / mother] are living, SAY: We would like to select the adoptive [father / mother] for questions about family help, but ACCEPT R’s choice of either bio or adoptive [father / mother]

- 1. [NAMF NAML ([ID68], [PN])] (Biological [father / mother] from PSID records)
- 2. [NAMF NAML ([ID68], [PN])]
   (Adoptive [Father / Mother] from PSID records)
- 3. [NAMF NAML ([ID68], [PN], [CYFUHU], [CYAQRTH])]
   ([Father / Mother] from FU)
- 4. ENTER [father / mother] information
- 5. [Father / Mother] deceased
   [DK/RF]

GO TO NEXT LOOP/ SUBLOOP; THEN GO PR7CKPT

NAMF. [PRELOAD OR FU PARENT]: Confirmation not required - UPDATE first name only if volunteered by R / ALL OTHERS:
What is [his / her] first name?
- Not necessary to confirm spelling

String 30

NAML. [PRELOAD OR FU PARENT]: Confirmation not required - UPDATE last name only if volunteered by R / ALL OTHERS:
What is [his / her] last name?
- Not necessary to confirm spelling

String 30

PR1. Parent: [NAMF NAML]
What is [R=PARENT: your / ALL OTHERS: NAMF NAML’s] age?

20—120

PR2. Parent: [NAMF NAML]
Compared to others [R=PARENT: your / ALL OTHERS: [his / her]] age, is [R=PARENT: your / ALL OTHERS: NAMF NAML’s] health excellent, very good, good, fair, or poor?

PR3. Parent: [NAMF NAML]

[R=PARENT: Are you / ALL OTHERS: Is [he / she]] working now, looking for work, retired, keeping house, a student, or what?

- If R says “Unemployed/Not working”, PROBE: [Are you / Is [he / she]] looking for work?
  - If unemployed/not working and looking for work, ENTER [3]
  - If unemployed/not working and not looking for work, ENTER [6]
- ENTER all that apply
- PROBE: Any others?

1. Working now
2. Only temporarily laid off, sick or maternity leave
3. Looking for work, unemployed
4. Retired
5. Disabled, permanently or temporarily
6. Keeping house
7. Student
8. Other-specify (PR3Spec. Specify. (String 100))

GO TO NEXT LOOP OR SUBLOOP; THEN GO TO PR7CKPT

PR7CKPT. CAI CHECKPOINT: WHICH PARENTS ARE LIVING

PR7. Parents: [NAMF NAML] and [NAMF NAML]

Are [R=PARENT: you and NAMF / ALL OTHERS: [your/HEAD’s / SPOUSE’s/PARTNER’s / WIFE’s’/”WIFE’s”] parents]] married to each other?

1. Yes, married to each other
2. Yes, living together (IF VOL)
3. Yes, parents together but DK if married or living together (IF VOL)
4. NEITHER/NOT ASCERTAINED
5. No

GO TO PR11

PR8City. Parents: [NAMF NAML] and [NAMF NAML]

In what city and state do [R=PARENT: you and NAMF / ALL OTHERS: they ] live?

- ENTER City and go to next screen for State
- If R says “same address as the R/FU”, PROBE: Please remind me what city and state that is
- ENTER [DK] or [RF] for DK/RF; Ctrl-D/Clr-R not allowed

PR8State. Parents: [NAMF NAML] and [NAMF NAML]

(What State is that in?) [PR8CITY]

- Start typing the name of the State to bring up the look-up list
- If foreign country, ENTER [FOR] for “Foreign Country” (Country name will not be collected)

PR9. Parents: [NAMF NAML] and [NAMF NAML]

Do [R=PARENT: you and NAMF / ALL OTHERS: they ] own the home or apartment where [R=PARENT: you / ALL OTHERS: they ] live or pay rent?

1. Owns or is buying
2. Only temporarily laid off, sick or maternity leave
3. Looking for work, unemployed
4. Retired
5. Disabled, permanently or temporarily
6. Keeping house
7. Student
8. Other-specify

5. No

GO TO PR11
PR10. Parents: [NAMF NAML] and [NAMF NAML]
Was [R=PARENT: your and NAMF’s] / ALL OTHERS: their total income for [PYEAR] more or less than $50,000?
1. More than $50,000  2. Less than $50,000  → GO TO PR10B  3. $50,000 (IF VOL)  DK/RF
↓
PR10A. Parents: [NAMF NAML] and [NAMF NAML]
Was it more than $75,000?
1. Yes  5. No
GO TO PRSIBCKPT
PR10B. Parents: [NAMF NAML] and [NAMF NAML]
Was it less than $25,000?
1. Yes  5. No
GO TO PRSIBCKPT

PR11. Parent: [NAMF NAML]
[R=PARENT: Are you / ALL OTHERS: Is [your/ HEAD’s / SPOUSE’s/Partner’s / WIFE’s/”WIFE’s”] [father / mother]] currently married or living with a romantic partner?
1. Yes, married  2. Yes, living with partner  3. Yes, has partner but DK if married or living together (IF VOL)  5. No

PR12City. Parent: [NAMF NAML] [and ]
• ENTER City and go to next screen for State
• If R says “same address as the R/FU”, PROBE: Please remind me what city and state that is
• ENTER [DK] or [RF] for DK/RF; Ctrl-D/Ctrl-R not allowed
String 40

PR12State. Parent: [NAMF NAML] [and spouse]
(What State is that in?) [PR12CITY]
• Start typing the name of the State to bring up the look-up list
• If foreign country, ENTER [FOR] for “Foreign Country” (Country name will not be collected)
String 30; State Lookup List

PR13. Parent: [NAMF NAML] [and spouse]
1. Owns or is buying  5. Pays rent  7. Neither owns nor rents
PR14. Parent: [NAMF NAML] [PR11=MARRIED: and spouse]

Was [PR11=MARRIED: [R=Parent: your and your spouse’s / ALL OTHERS: their] / PR11<>MARRIED: [R=Parent: your / ALL OTHERS: [his / her]] total income for [PYEAR] more or less than $50,000?

1. More than $50,000 2. Less than $50,000  \(\Rightarrow\) GO TO PR14B

↓

PR14A. Parent: [NAMF NAML] [and spouse]

Was it more than $75,000?

1. Yes 5. No

GO TO PRSIBCKPT

PR14B. Parent: [NAMF NAML] [and spouse]

Was it less than $25,000?

1. Yes 5. No

PRSIBCKPT. CAI CHECKPOINT: WHETHER R/HEAD AND SPOUSE/PARTNER/WIFE//"WIFE" IS NEW THIS WAVE & ALREADY ASKED SIB SERIES IN KL

1. R/HEAD IS NEW 2. SPOUSE/PARTNER/WIFE//"WIFE" IS NEW 5. ALL OTHERS

GO TO PREND RULE  

PRSIB. How many living brothers and sisters [do you / does [HEAD / SPOUSE/PARTNER / WIFE/"WIFE"] have?

- Include natural siblings only
- ENTER [95] for None

1-20  95. None

PREND RULE: WHETHER SPOUSE/PARTNER/WIFE//"WIFE" IN FU

THIS IS LOOP 1 (R / HEAD) & THERE IS SPOUSE/PARTNER/WIFE//"WIFE" IN FU  \(\Rightarrow\) GO TO WHICH PARENT LOOP 2 FOR SPOUSE/PARTNER/WIFE//"WIFE"  ALL OTHERS

End Parent Roster

Parent Transfers

PT1CKPT. WHETHER THERE ARE LIVING PARENTS OF R/HEAD OR SPOUSE/PARTNER/WIFE//"WIFE" AND R/HEAD OR SPOUSE/PARTNER/WIFE//"WIFE" IS < 80 YEARS OLD

1. 1+ LIVING PARENT & R/HD or SP/PRTNR/WF//"WF" < 80 YRS OLD 5. NO LIVING PARENTS & R/HD or SP/PRTNR/WF//"WF" < 80 YRS OLD 7. R/HD & SP/PRTNR/WF//"WF" = 80+ YRS OLD

↓

GO TO PT10A
PT1. Families sometimes help each other with activities such as errands, rides, chores, babysitting, or hands-on care.
In [PYEAR], did you / HEAD] [S/P/WF/"WF" IN FU: or SPOUSE/PARTNER / WIFE/"WIFE"] spend time helping [R/HEAD HAS A LIVING PARENT: your / HEAD's] [BOTH R/HEAD & S/P/WF/"WF" HAVE A LIVING PARENT: or ] [S/P/WF/"WF" HAS A LIVING PARENT: SPOUSE'S/PARTNER'S / WIFE'S/"WIFE'S"] [1 PARENT: parent / ALL OTHERS: parents]?
- [1 PARENT: If Yes: (Whose/Which) parents?]
- ENTER [?] for No or None
- [>1 PARENT: ENTER all that apply]
- [>1 PARENT: PROBE: Any others?]

SELECTED LIVING MARRIED PARENTS, OR LIVING FATHER &/OR LIVING MOTHER

1. [R/HD]’s parents ([NAMF NAML] and [NAMF NAML])
2. [R/HD]’s father ([NAMF NAML]) [and his [spouse/partner]]
3. [R/HD]’s mother ([NAMF NAML]) [and her [spouse/partner]]
4. [S/P/WF/"WF"]’s parents ([NAMF NAML] and [NAMF NAML])
5. [S/P/WF/"WF"]’s father ([NAMF NAML]) [and his [spouse/partner]]
6. [S/P/WF/"WF"]’s mother ([NAMF NAML]) [and her [spouse/partner]]
7. No/None

PT2. About how many hours in [PYEAR] did you / HEAD] [S/P/WF/"WF" IN FU: or SPOUSE/PARTNER / WIFE/"WIFE"] spend helping

- [PT2=1: [your [S/P/WF/"WF" IN FU: own] / HEAD’s] parents ([NAMF NAML] and [NAMF NAML])?
- [PT2=2: [your / HEAD’s] father ([NAMF NAML]) [and his [spouse / partner]]?]
- [PT2=3: [your / HEAD’s] mother ([NAMF NAML]) [and her [spouse / partner]]?]
- [PT2=4: [SPOUSE’s/PARTNER’s / WIFE’s/"WIFE’s"] parents ([NAMF NAML] and [NAMF NAML])?
- [PT2=5: [SPOUSE’s/PARTNER’s / WIFE’s/"WIFE’s"] father ([NAMF NAML]) [and his [spouse / partner]]?]
- [PT2=6: [SPOUSE’s/PARTNER’s / WIFE’s/"WIFE’s"] mother ([NAMF NAML]) [and her [spouse / partner]]?]

1-8760 DK/RF \rightarrow GO TO PT3 RULE

PT2Per. The amount entered is: [PT2] per __
- SELECT the unit of time below
  3. Week  4. Two weeks  5. Month  6. Year  7. Other-specify (PT2PerSpec: Specify, [String 100])

PT3 RULE: WHETHER SPOUSE/PARTNER/WIFE/"WIFE" IN FU

SPouse/PARTNER/WIFE/"WIFE" IN FU \rightarrow GO TO PT4 RULE

PT3. Was that mostly you / HEAD], mostly [SPOUSE/PARTNER / WIFE/"WIFE"], or both about equally?


PT4 RULE: WHETHER MORE PARENTS SELECTED AT PT1

MORE PARENTS SELECTED \rightarrow ASK PT2–PT3 FOR EACH; NO MORE PARENTS \rightarrow GO TO PT4
PT4. In [PYEAR], did [R/HEAD HAS A LIVING PARENT: your / HEAD’s] [BOTH R/HEAD & S/P/WF/"WF" HAVE A LIVING PARENT: or ] [S/P/WF/"WF" HAS A LIVING PARENT: SPOUSE’s/PARTNER’s / WIFE’s/"WIFE’s"] [1 PARENT: parent / ALL OTHERS: parents] spend time helping [you / HEAD] [S/P/WF/"WF" IN FU: or SPOUSE/PARTNER / WIFE/"WIFE"]? [>]1 PARENT: If Yes: (Whose/Which) parents?

- [1 PARENT: If Yes: ENTER code for Parent]
- ENTER [7] for No or None
- [>]1 PARENT: ENTER all that apply
- [>]1 PARENT: PROBE: Any others?

SELECTED LIVING MARRIED PARENTS, OR LIVING FATHER &/OR LIVING MOTHER

1. [R/HD]’s parents ([NAMF NAML] and [NAMF NAML])
2. [R/HD]’s father ([NAMF NAML]) [and his [spouse/partner]]
3. [R/HD]’s mother ([NAMF NAML]) [and her [spouse/partner]]
4. [S/P/WF/"WF"]’s parents ([NAMF NAML] and [NAMF NAML])
5. [S/P/WF/"WF"]’s father ([NAMF NAML]) [and his [spouse/partner]]
6. [S/P/WF/"WF"]’s mother ([NAMF NAML]) [and her [spouse/partner]]
7. No/None

GO TO PT6

PT5. About how many hours in [PYEAR] did

[PT4=1: your [S/P/WF/"WF" IN FU: own] / HEAD’s] parents ([NAMF NAML] and [NAMF NAML])
/ PT4=2: your / HEAD’s] father ([NAMF NAML]) [and his [spouse/partner]]
/ PT4=3: your / HEAD’s] mother ([NAMF NAML]) [and her [spouse/partner]]
/ PT4=4: [SPOUSE’s/PARTNER’s / WIFE’s/"WIFE’s"] parents ([NAMF NAML] and [NAMF NAML])
/ PT4=5: [SPOUSE’s/PARTNER’s / WIFE’s/"WIFE’s"] father ([NAMF NAML]) [and his [spouse/partner]]
/ PT4=6: [SPOUSE’s/PARTNER’s / WIFE’s/"WIFE’s"] mother ([NAMF NAML]) [and her [spouse/partner]]
spend helping [you / HEAD] [S/P/WF/"WF" IN FU: or SPOUSE/PARTNER / WIFE/"WIFE"]?

1-8760 DK/RF ➔ GO TO PT6 RULE

PT5Per. The amount entered is: [PT5] per __

- SELECT the unit of time below
  3. Week  4. Two weeks  5. Month  6. Year  7. Other-specify (PT5PerSpec. Specify. (String 100))

PT6 RULE: WHETHER MORE PARENTS SELECTED AT PT4

MORE PARENTS SELECTED ➔ ASK PT5–PT5PER FOR EACH; NO MORE PARENTS ➔ THEN GO TO PT6
PT6. In [PYEAR], did [you / HEAD] [S/P/WF/"WF" IN FU: or SPOUSE/PARTNER / WIFE/"WIFE"] give any money, loans or gifts of $100 or more to [R/HEAD HAS A LIVING PARENT: your / HEAD's] [BOTH R/HEAD & S/P/WF/"WF" HAVE A LIVING PARENT: or ] [S/P/WF/"WF" HAS A LIVING PARENT: SPOUSE's/PARTNER's / WIFE's/"WIFE's"] [I PARENT: parent / ALL OTHERS: parents]? 

- [1 PARENT: If Yes: ENTER code for Parent]
- ENTER [7] for No or None
- [>1 PARENT: ENTER all that apply]
- [>1 PARENT: PROBE: Any others?] 

SELECTED LIVING MARRIED PARENTS, OR LIVING FATHER &/OR LIVING MOTHER

1. [R/HD]'s parents ([NAMF NAML] and [NAMF NAML])
2. [R/HD]'s father ([NAMF NAML]) [and his [spouse/partner]]
3. [R/HD]'s mother ([NAMF NAML]) [and her [spouse/partner]]
4. [S/P/WF/"WF"]'s parents ([NAMF NAML] and [NAMF NAML])
5. [S/P/WF/"WF"]'s father ([NAMF NAML]) [and his [spouse/partner]]
6. [S/P/WF/"WF"]'s mother ([NAMF NAML]) [and her [spouse/partner]]
7. No/None

GO TO PT8

PT7. About how much did [you / HEAD] [S/P/WF/"WF" IN FU: or SPOUSE/PARTNER / WIFE/"WIFE"] give to

- [PT6=1: your [S/P/WF/"WF" IN FU: own] / HEAD's] parents ([NAMF NAML] and [NAMF NAML])
- [PT6=2: your / HEAD's] father ([NAMF NAML]) [and his [spouse / partner]]
- [PT6=3: your / HEAD's] mother ([NAMF NAML]) [and her [spouse / partner]]
- [PT6=4: SPOUSE's/PARTNER's / WIFE's/"WIFE's"] parents ([NAMF NAML] and [NAMF NAML])
- [PT6=5: SPOUSE's/PARTNER's / WIFE's/"WIFE's"] father ([NAMF NAML]) [and his [spouse / partner]]
- [PT6=6: SPOUSE's/PARTNER's / WIFE's/"WIFE's"] mother ([NAMF NAML]) [and her [spouse / partner]] in [PYEAR]?

- ENTER dollar amount, then SELECT unit of time at next screen (Week, Month, Year)

$ 100 - 999,999,997 [OK/RF] → GO TO PT8 RULE

↓
PT7Per. The amount entered is: [PT7] per __

- SELECT the unit of time below

PT8 RULE: WHETHER MORE PARENTS SELECTED AT PT6

MORE PARENTS SELECTED → ASK PT7–PT7PER FOR EACH; NO MORE PARENTS

THEN GO TO PT8 ↓
PT8. In [PYEAR], did [R/HEAD HAS A LIVING PARENT: your / HEAD’s [BOTH R/HEAD & S/P/WF/"WF" HAVE A LIVING PARENT: or ] [S/P/WF/"WF" HAS A LIVING PARENT: SPOUSE’s/PARTNER’s / WIFE’s/"WIFE’s"] 1 PARENT: parent / ALL OTHERS: parents] give [you / HEAD] [S/P/WF/"WF" IN FU: or SPOUSE/PARTNER / WIFE/"WIFE"] any money, loans, or gifts of $100 or more?  1 PARENT: If Yes: (Whose/Which) parents?

- [1 PARENT: If Yes: ENTER code for Parent]
- ENTER [?] for No or None
- [>1 PARENT: ENTER all that apply]
- [>1 PARENT: PROBE: Any others?]

SELECTED LIVING MARRIED PARENTS, OR LIVING FATHER &/OR LIVING MOTHER

<table>
<thead>
<tr>
<th>1. [R/HD] ‘s parents [NAMF NAML] and [NAMF NAML]</th>
<th>4. [S/P/WF/&quot;WF&quot;] ‘s parents [NAMF NAML] and [NAMF NAML]</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. [R/HD] ‘s father [NAMF NAML] and his [spouse/partner]</td>
<td>5. [S/P/WF/&quot;WF&quot;] ‘s father [NAMF NAML] and his [spouse/partner]</td>
</tr>
<tr>
<td>3. [R/HD] ‘s mother [NAMF NAML] and her [spouse/partner]</td>
<td>6. [S/P/WF/&quot;WF&quot;] ‘s mother [NAMF NAML] and her [spouse/partner]</td>
</tr>
<tr>
<td>7. No/None</td>
<td></td>
</tr>
</tbody>
</table>

PT9. About how much did [PT8=1: [your [S/P/WF/"WF" IN FU: own] / HEAD’s parents [NAMF NAML] and [NAMF NAML]] / PT8=2: [your / HEAD’s] father [NAMF NAML] and his [spouse / partner] / PT8=3: [your / HEAD’s] mother [NAMF NAML] and her [spouse / partner] / PT8=4: [SPOUSE’s/PARTNER’s / WIFE’s/"WIFE’s"] parents [NAMF NAML] and [NAMF NAML] / PT8=5: [SPOUSE’s/PARTNER’s / WIFE’s/"WIFE’s"] father [NAMF NAML] and his [spouse / partner] / PT8=6: [SPOUSE’s/PARTNER’s / WIFE’s/"WIFE’s"] mother [NAMF NAML] and her [spouse / partner] give to [you / HEAD] [S/P/WF/"WF" IN FU: or SPOUSE/PARTNER / WIFE/"WIFE"] in [PYEAR]?

- ENTER dollar amount, then SELECT unit of time at next screen (Week, Month, Year)

$ 100 - 999,999,997 OK/RF ➔ GO TO PT10A RULE

PT9PER. The amount entered is: [PT9] per __

- SELECT the unit of time below

PT10A RULE: WHETHER MORE PARENTS SELECTED AT PT8

MORE PARENTS SELECTED ➔ ASK PT9–PT9PER FOR EACH;  NO MORE PARENTS THEN GO TO PT10A

PT10A. [PTICKPT=5, 7: Since / ALL OTHERS: Next, since] turning 18, [have you / has HEAD] [S/P/WF/"WF" IN FU: or SPOUSE/PARTNER / WIFE/"WIFE"] received any of the following from [your / HEAD’s] [S/P/WF/"WF" IN FU: or SPOUSE’s/PARTNER’s / WIFE’s/"WIFE’s"] parents:

Help paying for school, including tuition, room and board, or books? If Yes: (Whose/Which) parents?

- ENTER [?] for No or None
- ENTER all that apply
- PROBE: Any others?

- IF NEEDED: Include amounts you already told me about for [PYEAR]

| 1. [R/HEAD] ‘s parents | 4. [SPOUSE/PARTNER/WIFE/"WIFE"] ‘s parents | 7. No/None |
PT11A. Help buying a home, including a down payment? If Yes: (Whose/Which) parents?
- ENTER [7] for No or None
- ENTER all that apply
- PROBE: Any others?
- IF NEEDED: Include both loans and gifts of money.
- IF NEEDED: Include amounts you already told me about for [PYEAR]
- IF NEEDED: Since turning 18, [have you / has HEAD] [S/P/WF/"WF" IN FU: or SPOUSE/PARTNER / WIFE/"WIFE"] received this from [your / HEAD's] [S/P/WF/"WF" IN FU: or SPOUSE's/PARTNER's / WIFE's/"WIFE's"] parents?

1. [R/HEAD]’s parents
4. [SPOUSE/PARTNER/WIFE/"WIFE"]’s parents
7. No/None

PT12A. Financial help for other expenses? If Yes: (Whose/Which) parents?
- ENTER [7] for No or None
- ENTER all that apply
- PROBE: Any others?
- IF NEEDED: Include amounts you already told me about for [PYEAR]
- IF NEEDED: Since turning 18, [have you / has HEAD] [S/P/WF/"WF" IN FU: or SPOUSE/PARTNER / WIFE/"WIFE"] received this from [your / HEAD's] [S/P/WF/"WF" IN FU: or SPOUSE's/PARTNER's / WIFE's/"WIFE's"] parents?

1. [R/HEAD]’s parents
4. [SPOUSE/PARTNER/WIFE/"WIFE"]’s parents
7. No/None

End Parent Transfers
Adult Child: Roster and Transfers

**Back to TOC**

Adult Child Roster

WHICHCHILDCKPT.

1. R/HEAD ONLY IN FU and R/HEAD <= 30 YRS OLD; OR R/HEAD + SPOUSE/PARTNER/WIFE/"WIFE" IN FU AND BOTH <=30 YRS OLD → GO TO SECTION M

5. ALL OTHERS ↓

SAQSN[1]: AQSN OF R/HEAD

SAQSN[2]: AQSN OF SPOUSE/PARTNER/WIFE/"WIFE"

WHICHCHILD. Next, let’s review [your / HEAD’s] [S/P/"WF" IN FU: and SPOUSE’s/PARTNER’s / WIFE’s/"WIFE’s"] adult children.

**THERE ARE FU, SECTION J OR PRELOADED CHILDREN OF HD or WF/"WF":**

I have the following [child / children] listed - could you confirm that [(he/she is / they are)] [your / HEAD’s] [S/P/"WF" IN FU: or SPOUSE’s/PARTNER’s / WIFE’s/"WIFE’s"] living, biological or adopted adult [child / children]?

- **READ name(s) and ENTER code if R endorses Child as living and 18+ years old**
- **ENTER [94] to add children not listed**
- **ENTER [95] ONLY IF none of the listed children are endorsed and there are no children to add**
- **Next, PROBE: [Do you / Does HEAD] [S/P/"WF" IN FU: or SPOUSE/PARTNER / WIFE/"WIFE"] have any other living biological or adopted children who are 18 or older?**

**THERE ARE NO FU, SECTION J OR PRELOADED CHILDREN OF HD or WF/"WF":**

[Do you / Does HEAD] [S/P/"WF" IN FU: or SPOUSE/PARTNER / WIFE/"WIFE"] have any living biological or adopted children who are 18 or older?

- **ENTER [94] to add children**
- **ENTER [95] ONLY IF there are no children to add**
- **PROBE: Any other (living biological or adopted) children (who are 18 or older)?**

1-30. **PRELOAD:** [NAMF NAML] (DOB: [Mo/Yr], [ID68], [PN], [BioDad: [NAME],] [AdptDad: [NAME],] [BioMom: [NAME],] [AdptMom: [NAME]])

**FU:** [NAMF NAML] (Age: [AGEIWDATE], DOB: [CYMOBRN/CYDYBRN/CYRBRN], [ID68], [PN], [CYFUHU], [CYAQRTH])

**J:** [NAMF NAML] (Age: [AGE], DOB: [OS2MO/OS2DY/OS2YR], [Dad: DADAQSN NAME], [Mom: MOMAQSNN NAME])

94. ENTER additional children (Do not read)

GO TO NAMF

95. No children / No listed children endorsed (Do not read)

GO TO SECTION M

↓

**CRNAMF. ADULT CHILD SELECTED FROM LIST**

[FU CHILD: Confirmation not required - UPDATE first name only if volunteered by R / ALL OTHERS: UPDATE first name if needed]

- Not necessary to confirm spelling

String 30

**CRNAML. ADULT CHILD SELECTED FROM LIST**

[FU CHILD: Confirmation not required - UPDATE last name only if volunteered by R / ALL OTHERS: UPDATE last name if needed]

- Not necessary to confirm spelling

String 30 → GO TO CRBMO
NAMF. ENTER NAME OF ADULT CHILD TO BE ADDED TO LIST
What is (this child’s/his/her) name?
• ENTER first name of child
• PRESS [Enter] if no (more) children to add

String 30

NAML. ENTER NAME OF ADULT CHILD TO BE ADDED TO LIST
(What is (this child’s/his/her) name?)
• ENTER last name of child

String 30

CRBMO. Child: [CRNAMF CRNAML]
[PRELISTED BIRTH DATE<>DK/RF: We recorded that [R=CHILD: you were / ALL OTHERS: CRNAMF was] born in [MONTH] [YEAR]. Is that correct? / ALL OTHERS: In what month and year [R=CHILD: were you / ALL OTHERS: was CRNAMF] born?]
• UPDATE or ENTER month of birth


CRBYR. Child: [CRNAMF CRNAML]
[(PRELISTED BIRTH DATE<>DK/RF: We recorded that [R=CHILD: you were / ALL OTHERS: CRNAMF was] born in [MONTH] [YEAR]. Is that correct? / ALL OTHERS: In what month and year [R=CHILD: were you / ALL OTHERS: was CRNAMF] born?)]
• UPDATE or ENTER year of birth

1920-1997

CRAGECKPT. WHETHER CHILD’s BIRTHDATE IS KNOWN

1. CRBMO OR CRBYR = DK/RF 5. ALL OTHERS ➔ GO TO NEXT CHILD; THEN GO TO CR1CKPT

CRAGE. Child: [CRNAMF CRNAML]
Could you tell me how old [R=CHILD: you are / ALL OTHERS: CRNAMF is]? 
• IF necessary: What is your best estimate?
1 - 120 ➔ GO TO NEXT CHILD; THEN GO TO CR1 RULE

CRAGE18. Child: [CRNamF CRNamL]
Can you tell me if [R=CHILD: you are / ALL OTHERS: CRNAMF is] age 18 or older?

1. Yes 5. No ➔ GO TO NEXT CHILD; THEN GO TO CR1 RULE
CR1CKPT. WHETHER CHILD IS 18+ YEARS OLD (CRBYR=1995 OR CRAGE>=18 OR CRAGE18=YES)

1. 18+ YEARS OLD
2. ALL OTHERS

→ GO TO NEXT CHILD; THEN GO TO CRENDCKPT

↓

CR1. Child: [CRNAMF CRNAML]

[1st CHILD: Now I would like to ask a few questions about [1 CHILD SELECTED : [R=CHILD: you / ALL OTHERS: CRNAMF] / > 1 CHILD SELECTED: each of the children age 18 and older], / SUBSEQUENT CHILDREN: (Next, let’s talk about [R=CHILD: you / ALL OTHERS: CRNAMF].)]

What is [R=CHILD: your / ALL OTHERS: CRNAMF’s] relationship to [R=HEAD, WIFE/”WIFE”: you / R=OFUM, PROXY: HEAD]?

• Do not probe

1. Son
2. Daughter
3. Step-son
4. Step-daughter
5. Partner’s son
6. Partner’s daughter
7. Adopted son
8. Adopted daughter

97. Other — specify (CR1Spec. Specify)

CR2 RULE: WHETHER SPOUSE/PARTNER/WIFE/”WIFE” IN FU

SPOUSE/PARTNER/WIFE/”WIFE” IN FU

→ ALL OTHERS

→ GO TO CR3

↓

CR2. Child: [CRNAMF CRNAML]

What is [R=CHILD: your / ALL OTHERS: CR1=1,3,5,7: his / CR1=2,4,6,8: her / ALL OTHERS: (his / her)] relationship to [R=HEAD, WIFE/”WIFE”: SPOUSE/PART / R=OFUM, PROXY: WIFE/”WIFE”]?

• Do not probe

1. Son
2. Daughter
3. Step-son
4. Step-daughter
5. Partner’s son
6. Partner’s daughter
7. Adopted son
8. Adopted daughter

97. Other — specify (CR2Spec. Specify)

CR3. Child: [CRNAMF CRNAML]

What is the highest grade or year of school that [R=CHILD: you have / ALL OTHERS: CR1=1,3,5,7: he has / CR1=2,4,6,8: she has / ALL OTHERS: (he / she) has] completed?

0. None
1. First grade
2. Second grade
3. Third grade
4. Fourth grade
5. Fifth grade
6. Sixth grade
7. Seventh grade
8. Eighth grade
9. Ninth grade
10. Tenth grade
11. Eleventh grade
12. Twelfth grade, "High School", GED
13. Less than one year college
14. One year college
15. Two years college
16. Three years college
17. Four years college
18. Five years or more college
19. College graduate
20. Post-graduate work
CR4. Child: [CRNAMF CRNAML]

[R=CHILD: Are you / ALL OTHERS: CR1=1,3,5,7: Is he / CR1=2,4,6,8: Is she / ALL OTHERS: Is (he / she)]
working now, looking for work, retired, keeping house, a student, or what?
• If R says “Unemployed/Not working”, PROBE: [Are you / [Is he / Is she / Is (he / she)] looking for work?
  - If unemployed/not working and looking for work, ENTER [3]
  - If unemployed/not working and not looking for work, ENTER [6]
• ENTER all that apply
• PROBE: Any others?

<table>
<thead>
<tr>
<th>1. Working now</th>
<th>2. Only temporarily laid off, sick or maternity leave</th>
<th>3. Looking for work, unemployed</th>
</tr>
</thead>
<tbody>
<tr>
<td>7. Student</td>
<td>8. Other specify (CR4Spec. Specify. (String 100))</td>
<td></td>
</tr>
</tbody>
</table>

CR5. Child: [CRNAMF CRNAML]

[R=CHILD: Are you / ALL OTHERS: [CR1=1,3,5,7: Is he / CR1=2,4,6,8: Is she / ALL OTHERS: Is (he / she)]
made, widowed, divorced, separated or [R=CHILD: have you / ALL OTHERS: [CR1=1,3,5,7: has he / CR1=2,4,6,8: has she / ALL OTHERS: has (he / she)] never been married?

|--------------|-------|------------------|-----------|------------|-------------|

GO TO CR7

CR6. Child: [CRNAMF CRNAML]

[R=CHILD: Are you / ALL OTHERS: [CR1=1,3,5,7: Is he / CR1=2,4,6,8: Is she / ALL OTHERS: Is (he / she)]
living with a romantic partner?

<table>
<thead>
<tr>
<th>1. Yes</th>
<th>5. No</th>
</tr>
</thead>
</table>

CR7. Child: [CRNAMF CRNAML]

How many living children [R=CHILD: do you / ALL OTHERS: [CR1=1,3,5,7: does he / CR1=2,4,6,8: does she / ALL OTHERS: does (he / she)] have?
• ENTER [95] for None

| 1-20 | 95. None |

CR8City. Child: [CRNAMF CRNAML]

In what city and state [CR5=MARRIED: [R=CHILD: do you and your spouse / ALL OTHERS: does CRNAMF
and [CR1=1,3,5,7: his / CR1=2,4,6,8: her / ALL OTHERS: does (his / her)] spouse] / CR5<>MARRIED: [R=CHILD: do you / ALL OTHERS: does CRNAMF live?

• ENTER City and go to next screen for State
• If R says “same address as the R/FU”, PROBE: Please remind me what city and state that is
• ENTER [DK] or [RF] for DK/RF; Ctrl-D/Ctrl-R not allowed

String 40

CR8State. Child: [CRNAMF CRNAML]

(What State is that in?)

[CR8City]
• Start typing the name of the State to bring up the look-up list
• If foreign country, ENTER [FOR] for “Foreign Country” (Country name will not be collected)

String 30; State Lookup List
CR9. Child: \[\text{CRNAMF \ CRNAML}\]

- \[\text{CR5=MARRIED: R=CHILD: Do you and your spouse / ALL OTHERS: Do they}\]
- \[\text{CR5<>MARRIED: R=CHILD: Do you / ALL OTHERS: CR1=1,3,5,7: Does he / CR1=2,4,6,8: Does she / ALL OTHERS: Does (he / she)]\]

own the apartment or home where \[\text{CR5=MARRIED: R=CHILD: you live / ALL OTHERS: they live}\]

\[\text{CR5<>MARRIED: R=CHILD: you live / ALL OTHERS: CR1=1,3,5,7: he lives / CR1=2,4,6,8: she lives / ALL OTHERS: (he / she) lives}\]

or pay rent?

1. Owns or is buying
2. Pays rent
3. Neither owns nor rents

CR10. Child: \[\text{CRNAMF \ CRNAML}\]

Was \[\text{CR5=MARRIED: R=CHILD: your and your spouse’s / ALL OTHERS: their}\]

\[\text{CR5<>MARRIED: R=CHILD: your / ALL OTHERS: CR1=1,3,5,7: his / CR1=2,4,6,8: her / ALL OTHERS: (his / her)]\]

\[\text{total income for \PYEAR\ more or less than $50,000?}\]

1. More than $50,000
2. Less than $50,000
3. $50,000 (IF VOL) [DK/RF]

\[\text{GO TO CR10B}\]

\[\downarrow\]

CR10A. Child: \[\text{CRNAMF \ CRNAML}\]

Was it more than $75,000?

1. Yes
2. No

\[\text{GO TO CR11}\]

CR10B. Child: \[\text{CRNAMF \ CRNAML}\]

Was it less than $25,000?

1. Yes
2. No

CR11. Child: \[\text{CRNAMF \ CRNAML}\]

Compared to others \[\text{R=CHILD: your / ALL OTHERS: CR1=1,3,5,7: his / CR1=2,4,6,8: her / ALL OTHERS: (his / her)]\]

\[\text{Does (his / her)]\]

\[\text{age, is \[\text{R=CHILD: your / ALL OTHERS: CRNAMF’s] health excellent, very good, good, fair, or poor?}\]

1. Excellent
2. Very good
3. Good
4. Fair
5. Poor

CREND RULE: WHETHER THERE ARE MORE CHILDREN

MORE CHILDREN SELECTED \[\text{GO TO NEXT CHILD}\]

NO MORE CHILDREN

\[\downarrow\]

CRENDCKPT. WHETHER THERE ARE CHILDREN OF R/HEAD OR SPOUSE/PARTNER/WIFE/"WIFE” 18 YEARS OR OLDER

1. 1+ CHILD >= 18 YRS OLD
2. ALL OTHERS

\[\text{GO TO SECTION M}\]

End Adult Child Roster
Adult Child Transfers

CT1. These next questions are about help to and from [your / HEAD’s] [S/P/WF/"WF" IN FU: or SPOUSE’s/PARTNER’s / WIFE’s/"WIFE’s"] children age 18 or older.

[PT1 NOT ASKED: Families sometimes help each other with activities, such as errands, rides, chores, babysitting, or hands-on care.]

In [PYEAR] did [you / HEAD] [S/P/WF/"WF" IN FU: or SPOUSE/PARTNER / WIFE/"WIFE"] spend time helping [1 CHILD: [R=CHILD: you / ALL OTHERS: CRNAMF CRNAML]] / >1 CHILD: one or more of [your / HEAD’s] [S/P/WF/"WF" IN FU: or SPOUSE’s/PARTNER’s / WIFE’s/"WIFE’s"] children? [> 1 CHILD: If Yes: (Whose/Which) children?]

- [1 CHILD: If Yes: ENTER code for Child]
- ENTER [95] for No or None
- [>1 CHILD: ENTER all that apply]
- [>1 CHILD: PROBE: Any others?]

SELECTED LIVING ADULT CHILDREN

1-40. [CRNAMF CRNAML]; [[[CRBMO/CRBYR] / [CRAGE] years old / 18 years or older] 95. No/None

↓

GO TO CT4

CT2. Child: [CRNAMF CRNAML]

[1ST CHILD: About how many hours in [PYEAR] did [you / HEAD] [S/P/WF/"WF" IN FU: or SPOUSE/PARTNER / WIFE/"WIFE"] spend helping [R=CHILD: you / ALL OTHERS: CRNAMF]? / ALL OTHERS: What about [R=CHILD: you / ALL OTHERS: CRNAMF]? (About how many hours in [PYEAR] did [you / HEAD] [S/P/WF/"WF" IN FU: or SPOUSE/PARTNER / WIFE/"WIFE"] spend helping [R=CHILD: you / ALL OTHERS: CRNAMF]?)

1-8760 DK/RF → GO TO CT3 RULE

↓

CT2Per. The amount entered is: [CT2] per __

- SELECT the unit of time below

3. Week 4. Two weeks 5. Month 6. Year 7. Other-specify (CT2PerSpec. Specify. (String 100))

CT3 RULE: WHETHER SPOUSE/PARTNER/WIFE/"WIFE" in FU

SPouse/PARTNER/Wife/"WIFE" IN FU ALL OTHERS → GO TO CT4 RULE

↓

CT3. Child: [CRNAMF CRNAML]

Was that mostly [you / HEAD], mostly [SPOUSE/PARTNER / WIFE/"WIFE"], or both about equally?


CT4 RULE: WHETHER MORE CHILDREN SELECTED AT CT1

MORE CHILDREN SELECTED → ASK CT2--CT3 FOR EACH; THEN GO TO CT4

NO MORE CHILDREN

↓
CT4. In [PYEAR], did [1 CHILD: [R=CHILD: you / ALL OTHERS: CRNAMF (CRNAML)] / >1 CHILD: one or more of [your / HEAD's] [S/P/WF/"WF" IN FU: or SPOUSE's/PARTNER's / WIFE's/"WIFE's"] children age 18 and older] spend time helping [you / HEAD] [S/P/WF/"WF" IN FU: or SPOUSE/PARTNER / WIFE/"WIFE"]? [>1 CHILD: If Yes: (Whose/Which) children?]
  - [1 CHILD: If Yes: ENTER code for Child]
  - ENTER [95] for No or None
  - [>1 CHILD: ENTER all that apply]
  - [>1 CHILD: PROBE: Any others?]

SELECTED LIVING ADULT CHILDREN

1-40. [CRNAMF CRNAML]; [(CRBMO/CRBYR) / [CRAGE] years old / 18 years or older]

CT5. Child: [CRNAML] [CRNAML]

[1 CHILD: About how many hours in [PYEAR] did [R=CHILD: you / ALL OTHERS: CRNAMF] spend helping [you / HEAD] [S/P/WF/"WF" IN FU: or SPOUSE/PARTNER / WIFE/"WIFE"]? / ALL OTHERS: What about [R=CHILD: you / ALL OTHERS: CRNAMF]? (About how many hours in [PYEAR] did [R=CHILD: you / ALL OTHERS: CRNAMF] spend helping [you / HEAD] [S/P/WF/"WF" IN FU: or SPOUSE/PARTNER/"WIFE"]?)]

1-8760 DK/RF → GO TO CT6 RULE

CT5Per. The amount entered is: [CT5] per __
  - SELECT the unit of time below
    - 3. Week
    - 4. Two weeks
    - 5. Month
    - 6. Year
    - 7. Other-specify (CT5PerSpec. Specify. (String 100))

CT6 RULE: WHETHER MORE CHILDREN SELECTED AT CT4

MORE CHILDREN SELECTED → ASK CT5–CT5PER FOR EACH; NO MORE CHILDREN

CT6. In [PYEAR], did [you / HEAD] [S/P/WF/"WF" IN FU: or SPOUSE/PARTNER / WIFE/"WIFE"] give any money, loans, or gifts of $100 or more to [1 CHILD: [R=CHILD: you / ALL OTHERS: CRNAMF (CRNAML)] / >1 CHILD: one or more of [your / HEAD's] [S/P/WF/"WF" IN FU: or SPOUSE's/PARTNER's / WIFE's/"WIFE's"] children age 18 and older]? [>1 CHILD: If Yes: (Whose/Which) children?]
  - [1 CHILD: If Yes: ENTER code for Child]
  - ENTER [95] for No or None
  - [>1 CHILD: ENTER all that apply]
  - [>1 CHILD: PROBE: Any others?]

SELECTED LIVING ADULT CHILDREN

1-40. [CRNAMF CRNAML]; [(CRBMO/CRBYR) / [CRAGE] years old / 18 years or older]

CT7. Child: [CRNAML] [CRNAML]

[1 CHILD: About how much did [you / HEAD] [S/P/WF/"WF" IN FU: or SPOUSE/PARTNER / WIFE/"WIFE"] give to [R=CHILD: you / ALL OTHERS: CRNAMF] in [PYEAR]? / ALL OTHERS: What about [R=CHILD: you / ALL OTHERS: CRNAMF]? (About how much did [you / HEAD] [S/P/WF/"WF" IN FU: or SPOUSE/PARTNER / WIFE/"WIFE"] give to [R=CHILD: you / ALL OTHERS: CRNAMF] in [PYEAR]?)
  - ENTER dollar amount, then SELECT unit of time at next screen (Week, Month, Year)

$ 100 - 999,999,997 DK/RF → GO TO CT8 RULE
CT7. The amount entered is: [CT7] per __
- SELECT the unit of time below
  3. Week   4. Two weeks   5. Month   6. Year   7. Other-specify (CT7PerSpec. Specify. [String 100])

CT8. MORE CHILDREN SELECTED → ASK CT7–CT7PER FOR EACH;  NO MORE CHILDREN ↓

CT8. In [PYEAR], did [1 CHILD: [R=CHILD: you / ALL OTHERS: CRNAMF (CRNAML)] / >1 CHILD: one or more of [your / HEAD’s] [S/P/WF/"WF" IN FU: or SPOUSE’s/PARTNER’s / WIFE’s/"WIFE’s"] children age 18 and older] give [you / HEAD] [S/P/WF/"WF" IN FU: or SPOUSE/PARTNER / WIFE/"WIFE"] any money, loans or gifts of $100 or more? [>1 CHILD: If Yes: (Whose/Which) children?]
- [1 CHILD: If Yes: ENTER code for Child]
- ENTER [95] for No or None
- [>1 CHILD: ENTER all that apply]
- [>1 CHILD: PROBE: Any others?]  

SELECTED LIVING ADULT CHILDREN
1-40. [CRNAMF CRNAML]; [[CRBMO/CRBYR] / [CRAGE] years old / 18 years or older]  95. No/None ↓

CT9. Child: [CRNAMF CRNAML]
1ST CHILD: About how much did [R=CHILD: you / ALL OTHERS: CRNAMF] give to [you / HEAD] [S/P/WF/"WF" IN FU: or SPOUSE/PARTNER / WIFE/"WIFE"] in [PYEAR]? / ALL OTHERS: What about [R=CHILD: you / ALL OTHERS: CRNAMF]? (About how much did [R=CHILD: you / ALL OTHERS: CRNAMF] give to [you / HEAD] [S/P/WF/"WF" IN FU: or SPOUSE/PARTNER / WIFE/"WIFE"] in [PYEAR]?)
- ENTER dollar amount, then SELECT unit of time at next screen (Week, Month, Year)
  $100 - 999,999,997 DK/RF → GO TO CT10 RULE ↓

CT9. The amount entered is: [CT9] per __
- SELECT the unit of time below
  3. Week   4. Two weeks   5. Month   6. Year   7. Other-specify (CT9PerSpec. Specify. [String 100])

CT10. MORE CHILDREN SELECTED → ASK CT9–CT9PER FOR EACH;  NO MORE CHILDREN ↓
CT10. Next, since turning 18, [1 CHILD: [R=CHILD: have you / ALL OTHERS: has CRNAMF (CRNAML)] / >1 CHILD: have one or more of [your / HEAD’s] [S/P/WF/"WF" IN FU: or SPOUSE’s/PARTNER’s / WIFE’s/"WIFE’s"] children] received any of the following from [you / HEAD] [S/P/WF/"WF" IN FU: or SPOUSE/PARTNER / WIFE/"WIFE"]?

Help paying for school, including tuition, room and board, and books? [>1 CHILD: If Yes: (Whose/Which) children?]

- [1 CHILD: If Yes: ENTER code for Child]
- ENTER [95] for No or None
- [>1 CHILD: ENTER all that apply]
- [>1 CHILD: PROBE: Any others?]
- IF NEEDED: Include amounts you already told me about for [PYEAR].

**SELECTED LIVING ADULT CHILDREN**

1-40. [CRNAMF CRNAML]; [[CRBMO/CRBYR] / [CRAGE] years old / 18 years or older] 95. No/None

↓

GO TO CT12

CT11. Child: [CRNAMF CRNAML]

[1ST CHILD: About how much was that to [R=CHILD: you / ALL OTHERS: CRNAMF] since [R=CHILD: you / ALL OTHERS: [CR1=1,3,5,7: he / CR1=2,4,6,8: she / ALL OTHERS: (he / she)]] turned 18? / ALL OTHERS: What about [R=CHILD: you / ALL OTHERS: CRNAMF]? (About how much was that to [R=CHILD: you / ALL OTHERS: CRNAMF]?)]

- ENTER dollar amount

$ 1 - 999,999,997

CT12 RULE: WHETHER MORE CHILDREN SELECTED AT CT10

MORE CHILDREN SELECTED → ASK CT11 FOR EACH; NO MORE CHILDREN

↑

THEN GO TO CT12

CT12. Help buying a home, including a down payment? [>1 CHILD: If Yes: (Whose/Which) children?]

- [1 CHILD: If Yes: ENTER code for Child]
- ENTER [95] for No or None
- [>1 CHILD: ENTER all that apply]
- [>1 CHILD: PROBE: Any others?]
- IF NEEDED: Include both loans and gifts of money
- IF NEEDED: Include amounts you already told me about for [PYEAR]
- IF NEEDED: Since turning 18, [1 CHILD: [R=CHILD: have you / ALL OTHERS: has CRNAMF (CRNAML)] / >1 CHILD: have one or more of [your / HEAD’s] [S/P/WF/"WF" IN FU: or SPOUSE’s/PARTNER’s / WIFE’s/"WIFE’s"] children] received this from [you / HEAD] [S/P/WF/"WF" IN FU: or SPOUSE/PARTNER / WIFE/"WIFE"]?

**SELECTED LIVING ADULT CHILDREN**

1-40. [CRNAMF CRNAML]; [[CRBMO/CRBYR] / [CRAGE] years old / 18 years or older] 95. No/None

↓

GO TO CT14

CT13. Child: [CRNAMF CRNAML]

[1ST CHILD: About how much was that to [R=CHILD: you / ALL OTHERS: CRNAMF] since [R=CHILD: you / ALL OTHERS: [CR1=1,3,5,7: he / CR1=2,4,6,8: she / ALL OTHERS: (he / she)]] turned 18? / ALL OTHERS: What about [R=CHILD: you / ALL OTHERS: CRNAMF]? (About how much was that to [R=CHILD: you / ALL OTHERS: CRNAMF]?)]

- ENTER dollar amount

$ 1 - 999,999,997
CT14 RULE: WHETHER MORE CHILDREN SELECTED AT CT12

MORE CHILDREN SELECTED → ASK CT13 FOR EACH; NO MORE CHILDREN
THEN GO TO CT14

CT14. Financial help for other expenses? [>1 CHILD: If Yes: (Whose/Which) children?]
- [1 CHILD: If Yes: ENTER code for Child]
- ENTER [95] for No or None
- [>1 CHILD: ENTER all that apply]
- [>1 CHILD: PROBE: Any others?]
- IF NEEDED: Include amounts you already told me about for [PYEAR]
- IF NEEDED: Since turning 18, [1 CHILD: [R=CHILD: have you / ALL OTHERS: has CRNAMF (CRNAML)] / >1 CHILD: have one or more of [your / HEAD’s] [S/P/WF/”WF” IN FU: or SPOUSE’s/PARTNER’s / WIFE’s/”WIFE’s”] children] received this from [you / HEAD] [S/P/WF/”WF” IN FU: or SPOUSE/PARTNER / WIFE/”WIFE”]?

SELECTED LIVING ADULT CHILDREN

1-40. [CRNAMF CRNAML]; [(CRBMO/CRBYR) / [CRAGE] years old / 18 years or older] 95. No/None

CT15. Child: [CRNAMF CRNAML]

[1ST CHILD: About how much was that to [R=CHILD: you / ALL OTHERS: CRNAMF] since [R=CHILD: you / ALL OTHERS: CR1=1,3,5,7: he / CR1=2,4,6,8: she / ALL OTHERS: (he / she)] turned 18? / ALL OTHERS: What about [R=CHILD: you / ALL OTHERS: CRNAMF]? (About how much was that to [R=CHILD: you / ALL OTHERS: CRNAMF]?)]
- ENTER dollar amount

$ 1 - 999,999,997

CTEND RULE: WHETHER MORE CHILDREN SELECTED AT CT14

MORE CHILDREN SELECTED → ASK CT15 FOR EACH; NO MORE CHILDREN
THEN GO TO SECTION M

End Adult Child Transfers
Section M: Philanthropy

M0 RULE: WHETHER RESPONDENT IS HEAD OR WIFE/"WIFE" (RESPONDENT=1, 2, 3)

\[
\begin{array}{c}
R = \text{HEAD/WIFE/"WIFE"} \\
\rightarrow \text{GO TO INTERVIEW END}
\end{array}
\]

Donations

M1_INTRO. Next, we will be talking about donations to charities that serve a variety of purposes such as religious activity, helping people in need, health care and medical research, education, arts, environment, and international aid. Charitable organizations include religious or non-profit organizations that help those in need or that serve and support the public interest. They range in size from national organizations like the United Way and the American Red Cross down to local community organizations. Political contributions are not included. Donations include money, assets, property or goods, whether made directly to the organization, through payroll deduction, or on the internet.

- ENTER [1] to continue

1. Continue

M1. During [PYEAR], did you [CYEAR_fu_count>1: or anyone in your family] donate money, assets, property or goods, with a combined value of more than $25 to religious or charitable organizations?

\[
\begin{array}{c}
1. \text{Yes} \\
5. \text{No} \\
\rightarrow \text{GO TO INTERVIEW END}
\end{array}
\]

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.

\[
\begin{array}{c}
1. \text{Yes} \\
5. \text{No} \\
\rightarrow \text{GO TO M3}
\end{array}
\]

M2A. How much was that in [PYEAR]? (Altogether, what was the total dollar value of all donations you [and your family] made in [PYEAR] towards religious purposes?)

\[
\begin{array}{c}
$1–999,997 \\
\rightarrow \text{GO TO M3}
\end{array}
\]

M2B. Was it $300 or more?

\[
\begin{array}{c}
1. \text{Yes} \\
S. No \\
\rightarrow \text{GO TO M3}
\end{array}
\]

M2C. Was it $1,000 or more?

\[
\begin{array}{c}
1. \text{Yes} \\
5. \text{No} \\
\rightarrow \text{GO TO M3}
\end{array}
\]

M2E. Was it $100 or more?

\[
\begin{array}{c}
1. \text{Yes} \\
5. \text{No} \\
\rightarrow \text{GO TO M3}
\end{array}
\]

M2D. Was it $2,500 or more?

\[
\begin{array}{c}
1. \text{Yes} \\
5. \text{No} \\
\rightarrow \text{GO TO M3}
\end{array}
\]
M3. [M2=YES: Not counting the donations you just told me about, (during [PYEAR],)] / ALL OTHERS: (During [PYEAR],)] did you [CYEAR FU COUNT>1: 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. How much was that (in [PYEAR])? (Altogether, what was the total dollar value of all donations you [CYEAR FU COUNT>1: and your family] made in [PYEAR] towards **combined purpose funds**)?

$1 – $99,997  → GO TO M4

DK/RF

↓

M3B. Was it $200 or more?

1. Yes  5. No  → GO TO M4

↓

M3C. Was it $500 or more?

1. Yes  5. No  → GO TO M4

DK/RF

↓

M3E. Was it $100 or more?

1. Yes  5. No  → GO TO M4

DK/RF

↓

M3D. Was it $1,000 or more?

1. Yes  5. No  → GO TO M4

DK/RF

↓

M4. ( [M2 OR M3=YES: Not counting the donations you just told me about, did you / ALL OTHERS: Did you] [CYEAR FU COUNT>1: or anyone in your family] make any donations (during [PYEAR]) to organizations that help people in need of food, shelter, or other basic necessities?)

1. Yes  5. No  → GO TO M5

↓

M4A. How much was that (in [PYEAR])? (What was the total dollar value of all donations you [CYEAR FU COUNT>1: and your family] made in [PYEAR] to organizations that help people in need of basic necessities?)

$1 – $99,997  → GO TO M4

DK/RF

↓

M4B. Was it $200 or more?

1. Yes  5. No  → GO TO M5

↓

M4C. Was it $500 or more?

1. Yes  5. No  → GO TO M5

DK/RF

↓

M4E. Was it $100 or more?

1. Yes  5. No  → GO TO M5

DK/RF

↓

M4D. Was it $1,000 or more?

1. Yes  5. No  → GO TO M5

DK/RF

↓
M5. (ANY M2, M3, M4=YES: Not counting the donations you just told me about, did you / ALL OTHERS: Did you) [CYEAR FU COUNT>1: or anyone in your family] make donations (during [PYEAR]) 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 → GO TO M6

M5A. How much was that (in [PYEAR])? (What was the total dollar value of all donations you [CYEAR FU COUNT>1: and your family] made in [PYEAR] towards health care or medical research organizations?)

$1 – 999,997 → GO TO M6 DK/RF

M5B. Was it $200 or more?

1. Yes 5. No DK/RF → GO TO M6

M5C. Was it $500 or more? M5E. Was it $100 or more?

1. Yes 5. No DK/RF 1. Yes 5. No DK/RF

M5D. Was it $1,000 or more?

1. Yes 5. No DK/RF

M6. (ANY M2, M3, M4, M5=YES: Not counting the donations you just told me about, did you / ALL OTHERS: Did you) [CYEAR FU COUNT>1: or anyone in your family] make donations (during [PYEAR]) 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 → GO TO M7

M6A. How much was that (in [PYEAR])? (What was the total dollar value of all donations you [CYEAR FU COUNT>1: and your family] made in [PYEAR] towards educational purposes?)

$1 – 999,997 → GO TO M7 DK/RF

M6B. Was it $200 or more?

1. Yes 5. No DK/RF → GO TO M7

M6C. Was it $500 or more? M6E. Was it $100 or more?

1. Yes 5. No DK/RF 1. Yes 5. No DK/RF

M6D. Was it $1,000 or more?

1. Yes 5. No DK/RF
M7. (ANY M2, M3, M4, M5, M6=YES: Not counting the donations you just told me about, (during [PYEAR]), ALL OTHERS: During [PYEAR],]) did you [CYEAR FU COUNT>1: 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. How much was that (in [PYEAR])? (What was the total dollar value of all donations you [CYEAR FU COUNT>1: and your family] made in [PYEAR] towards youth and family services purposes?)

$1 – 999,997 → GO TO M8

DK/RF

↓

M7B. Was it $200 or more?

1. Yes 5. No DK/RF → GO TO M8

↓

M7C. Was it $500 or more?

1. Yes 5. No DK/RF

↓

M7D. Was it $1,000 or more?

1. Yes 5. No DK/RF

↓

M7E. Was it $100 or more?

1. Yes 5. No DK/RF

↓

M7F. Was it $500 or more?

1. Yes 5. No DK/RF

↓

M7G. Was it $100 or more?

1. Yes 5. No DK/RF

↓

M8. (ANY M2, M3, M4, M5, M6, M7=YES: Not counting the donations you just told me about, (during [PYEAR]),) ALL OTHERS: (During [PYEAR],]) did you [CYEAR FU COUNT>1: 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. How much was that (in [PYEAR])? (What was the total dollar value of all donations you [CYEAR FU COUNT>1: and your family] made in [PYEAR] towards the arts, culture, or ethnic awareness?)

$1 – 999,997 → GO TO M9

DK/RF

↓

M8B. Was it $200 or more?

1. Yes 5. No DK/RF → GO TO M9

↓

M8C. Was it $500 or more?

1. Yes 5. No DK/RF

↓

M8D. Was it $1,000 or more?

1. Yes 5. No DK/RF

↓

M8E. Was it $100 or more?

1. Yes 5. No DK/RF

↓
M9. (ANY M2, M3, M4, M5, M6, M7, M8=YES: Not counting the donations you just told me about, (during [PYEAR],) / ALL OTHERS: (During [PYEAR],) did you [CYEAR FU COUNT>1: 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. How much was that (in [PYEAR])? (What was the total dollar value of all donations you [CYEAR FU COUNT>1: and your family] made in [PYEAR] towards improving neighborhoods and communities?)

$ 1 – 999,997 → GO TO M10

DK/RF

↓

M9B. Was it $200 or more?

1. Yes 5. No DK/RF → GO TO M10

↓

M9C. Was it $500 or more?

1. Yes 5. No DK/RF → GO TO M10

M9E. Was it $100 or more?

1. Yes 5. No DK/RF

↓

M9D. Was it $1,000 or more?

1. Yes 5. No DK/RF

↓

M10. (ANY M2, M3, M4, M5, M6, M7, M8, M9=YES: Not counting the donations you just told me about, (during [PYEAR],) / ALL OTHERS: (During [PYEAR],) did you [CYEAR FU COUNT>1: 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. How much was that (in [PYEAR])? (What was the total dollar value of all donations you [CYEAR FU COUNT>1: and your family] made in [PYEAR] towards preserving the environment?)

$ 1 – 999,997 → GO TO M11

DK/RF

↓

M10B. Was it $200 or more?

1. Yes 5. No DK/RF → GO TO M11

↓

M10C. Was it $500 or more?

1. Yes 5. No DK/RF → GO TO M11

M10E. Was it $100 or more?

1. Yes 5. No DK/RF

↓

M10D. Was it $1,000 or more?

1. Yes 5. No DK/RF

↓
M11. ([ANY M2-M10=YES]: Not counting the donations you just told me about, (during [PYEAR],) / ALL OTHERS: (During [PYEAR],)) did you [CYEAR FU COUNT>1: 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. How much was that (in [PYEAR])? (What was the total dollar value of all donations you [CYEAR FU COUNT>1: and your family] made in [PYEAR] towards providing international aid or promoting world peace?)

$1 – 999,997 → GO TO M12

M11B. Was it $200 or more?

1. Yes  5. No  → GO TO M12

M11C. Was it $500 or more?

1. Yes   5. No  → GO TO M12

M11E. Was it $100 or more?

1. Yes  5. No  → GO TO M12

M11D. Was it $1,000 or more?

1. Yes  5. No  → GO TO M12

M12. ([ANY M2-M11=YES]: Not counting the donations you just told me about, (during [PYEAR],) / ALL OTHERS: (During [PYEAR],)) did you [CYEAR FU COUNT>1: or anyone in your family] make donations of money, assets, or property to charitable organizations with purposes other than those we just talked about?

1. Yes  5. No → GO TO INTERVIEW END

M12A. What was the main purpose or cause supported by that organization?

- **PROBE:** Please tell me a little more about that. What does this organization do?

[String 200]
M12B. How much was that (in [PYEAR])? (What was the total dollar value of all donations you [CYEAR FU COUNT>1: and your family] made in [PYEAR] towards (this / these) last purpose(s)?)

$1 – 999,997 → GO TO INTERVIEW END

DK/RF

↓

M12C. Was it $200 or more?

1. Yes

↓

M12D. Was it $500 or more?

1. Yes

↓

GO TO INTERVIEW END

M12E. Was it $1,000 or more?

1. Yes

↓

GO TO INTERVIEW END

M12F. Was it $100 or more?

1. Yes

↓

GO TO INTERVIEW END

5. No

DK/RF

→ GO TO INTERVIEW END
Interview End

Q1. Thank you, that concludes the interview portion of my call. Now, I just need to verify some information that will help us contact [R=MEMBER: you / R=PROXY: this family] in the future.

- ENTER [1] to continue

Q2. IWER CHECKPOINT: SPANISH OR FOREIGN LANGUAGE USED

- Was SPANISH, or any OTHER FOREIGN language, used anywhere in this interview?

  1. Yes, Spanish or Foreign Language Used
  5. No
Address Updates and Payment

RPAY1. CAI CHECKPOINT: WHETHER RESPONDENT IS FU MEMBER (RESPONDENT=1, 2, 3, 4) OR PROXY (RESPONDENT=7)

1. R = FU MEMBER → GO TO RPAY2A
2. R = PROXY (NOT FU MEMBER) ↓

Proxy Address (AddrType=1)

RPAY1A. You will receive [$70.00] 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
1. Continue

PROXYADDR.TITLE. What is your complete name and mailing address?

• Title -- e.g. “Mr”, “Mrs”, “Ms”, “Miss”, “Dr”
• If no title, PRESS [Enter] to continue

String 6

PROXYADDR.NAMF. First Name

String 20

PROXYADDR.NAMM. Middle Name

• If none, PRESS [Enter] to continue

String 20

PROXYADDR.NAML. Last Name

• Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 20

PROXYADDR.SUFFIX. Suffix -- e.g. “Sr”, “Jr”

• If none, PRESS [Enter] to continue

String 3

PROXYADDR.INCO. In Care Of

• If none, PRESS [Enter] to continue

String 40

PROXYADDR.ADDR1. Address 1

• IF there is a street address and PO Box: Enter street address here and Enter PO Box in Address 2
• Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 40
PROXYADDR.APTSTE. Apt/Suite
- If none, PRESS [Enter] to continue

PROXYADDR ADDR2. Address 2
- If there is a street address and PO Box: Enter PO Box here
- If none, PRESS [Enter] to continue

PROXYADDR.CITY. City
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

PROXYADDR.STATE; STATEABBREV. State
- Start typing the name of the State to bring up the look-up list
- If foreign country, ENTER [FOR] to select “Foreign Country”

PROXYADDR.ZIP. Zip Code
- If foreign country, ENTER all [0]’s
- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER all [0]’s

PROXYADDR.COUNTRY; COUNTRYABBR. Country
- Start typing the name of the Foreign Country to bring up the look-up list

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
- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER all [0]’s

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]
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

RPAY1E. Is this a home phone, work phone, cell phone, or what?
- 1. Home phone or residence
- 2. Work phone
- 3. Cell phone
- 4. Pager
- 5. Fax
- 6. VoIP
- 7. Other-specify (RPAY1ESPEC. Specify [String 50])
RPAY1FF. What is your relationship to [HEAD]?

- 1. Mother
- 2. Father
- 3. Son
- 4. Daughter
- 5. Sister
- 6. Brother
- 7. Aunt
- 8. Uncle
- 9. Grandmother
- 10. Grandfather
- 11. Friend
- 12. Father-in-law
- 13. Mother-in-law
- 14. Cousin
- 97. Other-Specify (RPAY1FFSPEC. Specify. (String 50))

RPAY1G. In the future, we will be trying some interviews using the internet instead of telephone. We think this will save you time and be more convenient. May I have your email address so we can contact you when we're ready to start internet interviewing?

1. Yes 5. No → GO TO RAY2A

↓

RPAY1H. (What is that e-mail address?)
- ENTER email address, then READ BACK and VERIFY with Respondent
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 50

R/Head Mailing Address (AddrType=2)

RAY2A. [R=FU MEMBER]: You will receive [$70.00] 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=PROXY: I would also like to have the correct name and address for [HEAD].]

- Verify/Update/Change (R’s/Head’s) mailing address and phone number
- ENTER [1] to continue

1. Continue

RMAILADDR.TITLE. Title -- e.g. “Mr”, “Mrs”, “Ms”, “Miss”, “Dr”

- If no title, PRESS [Enter] to continue
- VERIFY Title

String 6

RMAILADDR.NAMF. First Name

- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]
- VERIFY First name

String 20

RMAILADDR.NAMM. Middle Name

- If none, PRESS [Enter] to continue
- VERIFY Middle name

String 20

RMAILADDR.NAML. Last Name

- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]
- VERIFY Last name

String 20
RMAILADDR.SUFFIX. Suffix -- e.g. “Sr”, “Jr”
- If none, PRESS [Enter] to continue
- VERIFY Suffix
  
RMAILADDR.INCO. [R=FU MEMBER: Now for your complete mailing address, as you would like it to appear on all correspondence from us. First, is there an “in care of” for your address / R=PROXY: Now for [Head]’s complete mailing address. First, is there an “in care of” for the address?]
- In Care Of
- If none, PRESS [Enter] to continue
  
RMAILADDR.ADDR1. Address 1
- IF R/Head has a street address and a PO Box in the same city, Enter street address here and Enter PO Box in Address 2
- IF R/Head has a street address and a PO Box in different cities, ENTER PO Box here and Enter street address in next section - RPay3 Street Address
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]
  
RMAILADDR.APTSTE. Apt/Suite
- If none, PRESS [Enter] to continue
  
RMAILADDR.ADDR2. Address 2
- IF R/Head has a street address and a PO Box in the same city, ENTER PO Box here.
- If none, PRESS [Enter] to continue
  
RMAILADDR.CITY. City
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]
  
RMAILADDR.STATE. State
- Start typing the name of the State to bring up the look-up list
- If foreign country, ENTER [FOR] to select “Foreign Country”
  
<table>
<thead>
<tr>
<th>RMAILADDR.ZIP. Zip Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>- If foreign country, ENTER all [0]’s</td>
</tr>
<tr>
<td>- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER all [0]’s</td>
</tr>
</tbody>
</table>
  
<table>
<thead>
<tr>
<th>RMAILADDR.COUNTRY; COUNTRYABBR. Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>- If different from USA</td>
</tr>
<tr>
<td>- Start typing the name of the Foreign Country to bring up the look-up list</td>
</tr>
</tbody>
</table>
  
↓

String 3

String 40

String 10

String 40

String 40

↓

String 10; all 8’s/9’s not allowed

String 30; String 2; Country Lookup List
RPAY2A. RULE: WHETHER RESPONDENT IS PROXY (RESPONDENT=7)

\[
\begin{array}{c}
R = \text{PROXY} \quad \text{ALL OTHERS} \quad \rightarrow \text{GO TO RPAY2B} \\
\downarrow
\end{array}
\]

RPAY2A2. Is there a phone number for [HEAD]?

1. Yes 5. No \rightarrow \text{GO TO RPAY2G RULE}

\downarrow

RPAY2B. What is \([R=FU \text{ MEMBER: your} / R=\text{PROXY: [HEAD]’s}]\) area code and phone number?

- Area Code and Telephone Number
- If foreign phone, ENTER all [0]’s and put foreign number in next field
- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER all [0]’s

\([___-___] \quad \text{ALL 8’s/9’s NOT ALLOWED}\)

RPAY2C. Extension?

- Enter foreign phone number in this field
- If no extension, PRESS [Enter] to continue

String 20

RPAY2D. In whose name is this phone listed or whose phone is that?

- If phone number is not listed, enter [UNLISTED]
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 40

RPAY2E. Is this a home phone, work phone, cell phone, or what?


5. Fax 6. VoIP 7. Other specify (RPAY2ESPEC, Specify (String 50))

RPAY2F. Is there a [second / third] phone?

- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER [5]

1. Yes \rightarrow \text{REPEAT RPAY2B—RPAY2E; MAX=3;}

THEN GO TO RPAY2G RULE

5. No

\downarrow

PAY2G. RULE: WHETHER RESPONDENT IS PROXY (RESPONDENT=7)

\[
\begin{array}{c}
R = \text{PROXY} \quad \rightarrow \text{GO TO RPAY3A} \\
\downarrow
\end{array}
\]

EMAILA QSN. LOOP 1-AQSN OF RESPONDENT; LOOP 2-AQSN OF SPOUSE IF R=HEAD/WIFE/"WIFE"

[R Loop: In the future, we will be trying some interviews using the internet instead of telephone. We think this will save you time and be more convenient.

May I have your email address so we can contact you when we’re ready to start internet interviewing?

/SPOUSE Loop: (In the future, we will be trying some interviews using the internet instead of telephone. We think this will save [HEAD / WIFE/"WIFE"] time and be more convenient.)

May I have [HEAD / WIFE/"WIFE"]’s email address so we can contact [him / her] when we’re ready to start internet interviewing?]

1. Yes [SPOUSE: , and is different than R’s] 2. Yes, and is same as R’s] 5. No

↓ ASSIGN RPAY2G[2]=RPAY2G[1]; GO TO RPAY2H RULE

GO TO RPAY3A

RPAY2H. (What is that e-mail address?)

- ENTER email address, then READ BACK and VERIFY with Respondent
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 50

RPAY2H. RULE: WHETHER R IS OFUM (RESPONDENT=4) OR HEAD/WIFE/"WIFE" (RESPONDENT=1, 2, 3); WHETHER WIFE/"WIFE" IN FU (CYFUHU=1, 4 & CYAQRTH=202, 222)

R = HEAD OR WIFE/"WIFE" R = OFUM

WIFE/"WIFE" IN FU → ASK RPAY2G-H FOR SPOUSE; NO WIFE/"WIFE" IN FU

THEN GO TO RPAY3A

↓

R Street Address

RPAY3A. Is [R=FU MEMBER: your / R=PROXY: [HEAD]'s] street address where [you / he / she] actually live[s] different from the mailing address?

- STREET ADDRESS is the address where R/Head ACTUALLY LIVES, which is sometimes different from R/Head’s mailing address
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

1. Yes 5. No → GO TO RPAY4A

↓

RPAY3B.INCO. Please tell me that address.

- In Care Of
- If none, PRESS [Enter] to continue

String 40

RPAY3B.ADDR1. Address 1

- DO NOT enter PO Box here, since we are asking for a street address. GO BACK to section RPAY2 Mailing Address to enter PO Box
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 40

RPAY3B/aptste. Apt/Suite

- If none, PRESS [Enter] to continue

String 10
RPAY3B.ADDR2. Address 2
- DO NOT enter PO Box here, since we are asking for a street address. GO BACK to section RPay2 Mailing Address to Enter PO Box
- If none, PRESS [Enter] to continue

String 40

RPAY3B.CITY. City
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 40

RPAY3B.STATE. State
- Start typing the name of the State to bring up the look-up list
- If foreign country, ENTER [FOR] to select “Foreign Country”

String 30; String 4; State Lookup List. State
Foreign Country | DK/RF → GO TO RPAY4A

RPAY3B.ZIP. Zip Code
- If foreign country, ENTER all [0]'s
- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER all [0]'s

String 10; all 8’s/9’s not allowed

RPAY3B.COUNTRY; COUNTRYABBR. Country if different from USA
- Start typing the name of the Foreign Country to bring up the look-up list

String 30; String 2; Country Lookup List

Other Payee Address (AddrType=3)

RPAY4A. [R=FU MEMBER: You may accept the [$70.00] or have it sent to someone else of your choosing. / R=PROXY: As a proxy respondent, you may accept the [$70.00], have it sent to [HEAD], or sent to someone else of your choosing.]  
Which would you prefer?

<table>
<thead>
<tr>
<th>1. Respondent/Proxy accepts payment</th>
<th>PROXY R: 2. Proxy wishes that Head receive payment</th>
<th>3. Other person receives payment</th>
<th>4. Payment declined (IF VOL)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>[PROXY R: 2. Proxy wishes that Head receive payment]</td>
<td>3. Other person receives payment</td>
<td>4. Payment declined (IF VOL)</td>
</tr>
</tbody>
</table>

GO TO RPAY5A

↓

GO TO RPAY5A

RPAY4B.TITLE. Who would you like to receive the check? To what address should we send the check?
- Title -- e.g. “Mr”, “Mrs”, “Ms”, “Miss”, “Dr”
- If no title, PRESS [Enter] to continue

String 6

RPAY4B.NAMF. First Name
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 20

RPAY4B.NAMM. Middle Name
- If none, PRESS [Enter] to continue

String 20
RPAY4B.NAML. Last Name
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 20

RPAY4B.SUFFIX. Suffix -- e.g. “Sr”, “Jr
- If none, PRESS [Enter] to continue

String 3

RPAY4B.INCO. In Care Of
- If none, PRESS [Enter] to continue

String 40

RPAY4B.ADDR1. Address 1
- IF there is a street address and PO Box: Enter street address here and Enter PO Box in Address 2
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 40

RPAY4B.APTSTE. Apt/Suite
- If none, PRESS [Enter] to continue

String 10

RPAY4B.ADDR2. Address 2
- IF there is a street address and PO Box: Enter PO Box here
- If none, PRESS [Enter] to continue

String 40

RPAY4B.CITY. City
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 40

RPAY4B.STATE. State
- Start typing the name of the State to bring up the look-up list
- If foreign country, ENTER [FOR] to select “Foreign Country”

String 30; String 4; State Lookup List. State

RPAY4B.ZIP. Zip Code
- If foreign country, ENTER all [0]'s
- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER all [0]'s

String 10; all 8’s/9’s not allowed

RPAY4B.COUNTRY; COUNTRYABBR. Country if different from USA
- Start typing the name of the Foreign Country to bring up the look-up list

String 30; String 2; Country Lookup List
RPAY4B2. Is there a phone number for [NAMF NAML]?
- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER [5]

1. Yes 5. No → GO TO RPAYSA

RPAY4C. What is [NAMF NAML’s] area code and phone number?
- Area Code and Telephone Number
- If foreign phone number, ENTER all [0]’s and put foreign number in next field
- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER all [0]’s

( _ _ _ ) _ _ _ _ _ _ ALL 8’s/9’s NOT ALLOWED

RPAY4D. Extension?
- Enter foreign phone number in this field
- If none, PRESS [Enter] to continue

String 20

RPAY4E. In whose name is this phone listed?
- If phone number is not listed, enter [UNLISTED]
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 40

RPAY4F. Is this a home phone, work phone, cell phone, or what?

5. Fax 6. VoIP 7. Other-specify (RPAY4GSPEC. Specify [String 50])

Contact 1 Address (AddrType=4)
RPAY5A. [R=FU MEMBER: Just in case you should move [IWTYPE=REINT, RECON: 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. / R=PROXY: Just in case [HEAD] should move [IWTYPE=REINT, RECON: and we do not receive [his / her] address update postcard,] we would like the name of someone who could help us locate [him / her]. ]
- ENTER [1] to continue

1. Continue

RPAY5B. Interviewer Checkpoint
- Is there Contact Person 1 information displayed below?

1. Yes, Contact Person is displayed 5. No, no contact person is displayed → GO TO RPAY5D TITLE

RPAY5C. Last time, we had [NAMF NAML] listed as a contact for [R=FU MEMBER: you / R=PROXY: [HEAD]]. Would you like to continue with this contact?
- ENTER [7] if R refuses Contact Person information

1. Yes, continue with this contact [PROXY R: 2. Yes, & CP is not Proxy] [PROXY R: 3. Yes, & CP is Proxy] 5. No, change CP info 7. R refused CP info → GO TO RPAY6A

GO TO RPAY6A
RPAY5D.TITLE: [RPAY5C=CONTINUE: Does (he/she) still live at this address? Is the phone number right? Area code and phone number? Extension? / RPAY5C=CHANGE: Who shall I list as a contact person for [R=FU MEMBER: you / R=PROXY: [HEAD]]? What is (his/her) complete name and mailing address?]

- 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 RPay5b and ENTER [1] and then ENTER [7] at RPay5c to exit these questions

String 6

RPAY5D.NAMF. First Name
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 20

RPAY5D.NAMM. Middle Name
- If none, PRESS [Enter] to continue

String 20

RPAY5D.NAML. Last Name
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 20

RPAY5D.SUFFIX. Suffix -- e.g. “Sr”, “Jr”
- If none, PRESS [Enter] to continue

String 3

RPAY5D.INCO. In Care Of
- If none, PRESS [Enter] to continue

String 40

RPAY5D.ADDR1. Address 1
- IF there is a street address and PO Box: Enter street address here and Enter PO Box in Address 2
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 40

RPAY5D.APTSTE. Apt/Suite
- If none, PRESS [Enter] to continue

String 10

RPAY5D.ADDR2. Address 2
- IF there is a street address and PO Box: Enter PO Box here
- If none, PRESS [Enter] to continue

String 40
RPAY5D.CITY. City
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 40

RPAY5D.STATE; STATEABBREV. State
- Start typing the name of the State to bring up the look-up list
- If foreign country, ENTER [FOR] to select “Foreign Country”

String 30; String 4; State Lookup List. State  Foreign Country  DK/RF  → GO TO RPAY5C2

↓

RPAY5D.ZIP. Zip Code
- If foreign country, ENTER all [0]’s
- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER all [0]’s

String 10; all 8’s/9’s not allowed

RPAY5D.COUNTRY; COUNTRYABBR. Country if different from USA
- Start typing the name of the Foreign Country to bring up the look-up list

String 30; String 2; Country Lookup List

RPAY5C2. Is there a phone number for [NAMF NAML]?
- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER [5]

1. Yes  5. No  → GO TO RPAY5JJ

↓

RPAY5E. (What is the area code and phone number?)
- Area Code and Telephone Number
- If foreign phone number, ENTER all [0]’s and put foreign number in next field
- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER all [0]’s

(   )   -   -   -   -   -   -   -   ALL 8’s/9’s NOT ALLOWED

RPAY5F. Extension?
- Enter foreign phone number in this field
- If none, PRESS [Enter] to continue

String 20

RPAY5G. In whose name is this phone listed?
- If phone number is not listed, enter [UNLISTED]
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 40

RPAY5H. Is this a home phone, work phone, cell phone, or what?

5. Fax  6. VoIP  7. Other-specify (RPAY5HSPEC. Specify [String 50])

RPAY5I. Is there a second phone?
- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER [5]

1. Yes  → REPEAT RPAY5E–RPAY5H; MAX=2; THEN GO TO RPAY5JJ  5. No

↓
RPAY5JJ. What is (his / her) relationship to [R=FU MEMBER: you / R=PROXY: [HEAD]]?


Contact 2 Address (AddrType=5)

RPAY6A. Interviewer Checkpoint

• Is there Contact Person 2 information displayed below?
  1. Yes, Contact Person is displayed  5. No, no contact person is displayed → GO TO RPAY6C

RPAY6B. Last time, we had [NAMF NAML] listed as a contact for [R=FU MEMBER: you / R=PROXY: [HEAD]]. Would you like to continue with this contact?

• ENTER [7] if R refuses Contact Person information
  1. Yes, continue with this contact  [PROXY R: 2. Yes, & CP is not Proxy]  5. No, change CP info 7. R refused CP info
  [PROXY R: 3. Yes, & CP is Proxy]

GO TO RPAY6D.TITLE  GO TO RPAY6D  GO TO TY1 RULE

RPAY6C. We would like to have the name of a second contact person, someone who will know where we can reach [R=FU MEMBER: you / R=PROXY: [HEAD]] if the first contact is not able to help us. Is there a second contact person who can help us reach [R=FU MEMBER: you / R=PROXY: [HEAD]]?

1. Yes  5. No → GO TO TY1 RULE

RPAY6D.TITLE. [RPAY6B=CONTINUE: Does (he/she) still live at this address? Is the phone number right? Area code and phone number? Extension? / RPAY6B=CHANGE: Who shall I list as a contact person for [R=FU MEMBER: you / R=PROXY: [HEAD]]? What is (his/her) complete name and mailing address?]

• 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 RPay6a and ENTER [1] and then ENTER [7] at RPay6b to exit these questions

String 6

RPAY6D.NAMF. First Name

• Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]
String 20

RPAY6D.NAMM. Middle Name

• If none, PRESS [Enter] to continue
String 20

RPAY6D.NAML. Last Name

• Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]
String 20
RPAY6D.SUFFIX.  Suffix -- e.g. “Sr”, “Jr
  •  If none, PRESS [Enter] to continue

String 3

RPAY6D.INCO.  In Care Of
  •  If none, PRESS [Enter] to continue

String 40

RPAY6D.ADDR1.  Address 1
  •  IF there is a street address and PO Box: Enter street address here and Enter PO Box in Address 2
  •  Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 40

RPAY6D.APTSTE.  Apt/Suite
  •  If none, PRESS [Enter] to continue

String 10

RPAY6D.ADDR2.  Address 2
  •  IF there is a street address and PO Box: Enter PO Box here
  •  If none, PRESS [Enter] to continue

String 40

RPAY6D.CITY.  City
  •  Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 40

RPAY6D.STATE; STATEABBREV.  State
  •  Start typing the name of the State to bring up the look-up list
  •  If foreign country, ENTER [FOR] to select “Foreign Country”

String 30; String 4; State Lookup List. State  Foreign Country  DK/RF → GO TO RPAY6C2

RPAY6D.ZIP.  Zip Code
  •  If foreign country, ENTER all [0]’s
  •  Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER all [0]’s

String 10; all 8’s/9’s not allowed

RPAY6D.COUNTRY; COUNTRYABBREV.  Country if different from USA
  •  Start typing the name of the Foreign Country to bring up the look-up list

String 30; String 2; Country Lookup List

RPAY6C2.  Is there a phone number for [NAMF NAML]?
  •  Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER [5]

1. Yes  5. No → GO TO RPAY6JJ

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
- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER all [0]'s

( _ _ _) _ _ - _ _ ALL 8's/9's NOT ALLOWED

RPAY6F. Extension?
- Enter foreign phone number in this field
- If none, PRESS [Enter] to continue

String 20

RPAY6G. In whose name is this phone listed?
- If phone number is not listed, enter [UNLISTED]
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 40

RPAY6H. Is this a home phone, work phone, cell phone, or what?

1. Home phone or residence
2. Work phone
3. Cell phone
4. Pager
5. Fax
6. VoIP
7. Other-specify (RPAY6HSPEC. Specify (String 50))

RPAY6I. Is there a second phone?
- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER [5]

1. Yes → REPEAT RPAY6E–RPAY6H; MAX=2; THEN GO TO RPAY6JJ
5. No

RPAY6JJ. What is (his / her) relationship to [R=FU MEMBER: you / R=PROXY: [HEAD]]?

1. Mother
2. Father
3. Son
4. Daughter
5. Sister
6. Brother
7. Aunt
8. Uncle
9. Grandmother
10. Grandfather
11. Friend
12. Father-in-law
13. Mother-in-law
14. Cousin
15. Other-Specify (RPAY6JSPEC. Specify. (String 50))

Transition to Adulthood Address

TY1. RULE: WHETHER THERE ARE TA ELIGIBLE INDIVIDUALS IN FU (PYPERSINFO[].TYELIG2011 = 1)

TA INDIV 17+ YRS → GO TO NEXT TA; THEN GO TO RPAY7A
TA INDIV < 17 YRS → ALL OTHERS

TYINSTANCE. AQSN OF THIS PERSON

TY1. TY Eligible Person: [CYNAMF] [CYNAML] [CYAQRTH]

[ R=TA INDIV: You / ALL OTHERS: [CYNAMF CYNAML]] [TA AGE=17: may [2nd, 3rd ITERATION: also] be / TA AGE>17: [are / is] [2nd, 3rd ITERATION: also]] eligible to participate in a new survey we will be doing in the near future. Will we be able to reach [R=TA INDIV: you / ALL OTHERS: CYNAMF CYNAML] at [TA FUHU=FU, FUMI: your current address and phone number / TA FUHU=MO, MIL, EDUC: the address and phone number that you gave me earlier]?

1. Yes → GO TO TYEMAIL
5. No
TY Eligible Person: [CYNAMF] [CYNAML] [CYAQRTH]

Do you know what [your / his / her] new address and phone number will be?

1. Yes  5. No  → GO TO TYEMAIL

TY.ADDR1. TY Eligible Person: [CYNAMF] [CYNAML] [CYAQRTH]
- Address 1
- Enter P.O. Box in Addr2
- Record complete street address including apartment/suite number here
- Record any college or university or military base name here
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

TY.ADDR2 TY Eligible Person: [CYNAMF] [CYNAML] [CYAQRTH]
- Address 1
- Enter P.O. Box here
- If none, PRESS [Enter] to continue

TY.CITY. TY Eligible Person: [CYNAMF] [CYNAML] [CYAQRTH]
- City
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

TY.STATE; STATEABBREV. TY Eligible Person: [CYNAMF] [CYNAML] [CYAQRTH]
- State
- Start typing the name of the State to bring up the look-up list
- If foreign country, ENTER [FOR] to select “Foreign Country”

TY.ZIP. TY Eligible Person: [CYNAMF] [CYNAML] [CYAQRTH]
- Zip Code
- If foreign country, ENTER all [0]’s
- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER all [0]’s

TY.COUNTRY; COUNTRYABBR. TY Eligible Person: [CYNAMF] [CYNAML] [CYAQRTH]
- Country if different from USA
- Start typing the name of the Foreign Country to bring up the look-up list

TY.PHONE. TY Eligible Person: [CYNAMF] [CYNAML] [CYAQRTH]
What is the area code and phone number?
- Area Code and Telephone Number
- If foreign phone number, ENTER all [0]’s and put foreign number in next field
- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER all [0]’s

( _ _ ) _ _ _ _ _ _ ALL 8’s/9’s NOT ALLOWED
TY. EXTENSION. TY Eligible Person: [CYNAMF] [CYNAML] [CYAQRTH]
Extension?
• Enter foreign phone number in this field
• If none, PRESS [Enter] to continue

TY3. TY Eligible Person: [CYNAMF CYNAML CYAQRTH]
Is this a home phone, work phone, cell phone, or what?
• For educational or military group housing, use [7 - Other specify] and PROBE: “Is that phone number for a private telephone or one that is used by several people?”

TYEMAIL. RULE: WHETHER THIS TA FU MEMBER IS RESPONDENT

TYEMAIL. As I said earlier, we’re planning to try some interviews in the future using the internet instead of telephone. (We think this will save [you / CYNAMF] time and be more convenient.) May I have [your / CYNAMF’s] email address so we can contact [you / him / her] when we’re ready to start internet interviewing?

TYEMAILADDR. (What is that e-mail address?)
• ENTER email address, then READ BACK and VERIFY with Respondent
• Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

TY3. RULE: WHETHER THERE ARE MORE TA ELIGIBLE INDIVIDUALS IN FU

OTHER FAMILY UPDATES

RPAY7A. Interviewer Checkpoint
• Are there others in this family folder whose address and phone number need updating?

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
Cell Phone Use for Interview
RPAY7C. Interviewer Checkpoint
• Did Respondent use a cell phone to complete this interview?
  1. Yes  5. No → GO TO RPAY9 RULE

↓

RPAY7D. Interviewer Checkpoint
• Was a cell phone payment offered by you or anyone else?
  1. Yes  5. No

Payment
RPAY9. RULE: WHETHER PAYMENT ACCEPTED (RPAY4A=1, 3) OR DECLINED (RPAY4A=4)

PAYMENT ACCEPTED  PAYMENT DECLINED → GO TO RPAY8

↓

RPAY9A. Interviewer Checkpoint
• Can the incentive(s) be paid by check or did R request a money order?
• The standard amount for the main PSID interview is [70.00]
• For standard payments by check or money order, ENTER [1] or [2]. To request a cell phone payment or record a temporary mailing address in addition to the standard payment, ENTER [1] or [2] and [7] for Special Handling.
• For non-standard payment amounts (with or without cell phone payment or temporary mailing address), ENTER [7] for Special Handling.
• For cash payments, ENTER [5] to record date paid, amount paid, and cell phone amount paid.
• ENTER all that apply
  1. Yes, pay by check in standard amount
  2. Yes, pay by money order in standard amount
  5. No, I was paid R fee in cash
  7. Special handling (Non-Std IW Pymt; Cell Pymt; Temp Address)

IF SELECTED ALONE, GO TO RPAY9 HARD CK
GO TO RPAY9B  GO TO RPAY9D

MAX 2 MENTIONS: 1 & 7 OR 2 & 7 ONLY

RPAY9A SOFT CHECK #1 (SUPPRESS=continue, CLOSE/GOTO=RPAY9A).
IF RPAY9A=MOONEY ORDER:
  You have selected money order as method of payment.
  READ TO R: A money order would delay payment by 1-2 weeks, and if it is lost cannot be replaced for 6-8 weeks. Is that okay or should we issue a check instead?
  Change your selection to [1. Check] if necessary.

RPAY9A SOFT CHECK #2 (SUPPRESS=continue, CLOSE/GOTO=RPAY9A, RPAY7D).
IF RPAY7D=YES & ((RPAY9A=CHECK, MONEY ORDER) & RPAY9A<>SPECIAL HANDLING):
  INTERVIEW WAS COMPLETED USING CELL PHONE and CELL PHONE PAYMENT HAS BEEN OFFERED.
  Non-standard payment amounts: ENTER [7].
  Cash payments: a separate screen will automatically ask for cell phone payment amount.

Cash Payment
RPAY9B. When did you make the cash payment?
• ENTER MM/DD/[CYEAR], with or without slashes
  _ _ / _ _ / [CYEAR]
RPAY9C. How much was the Respondent payment for this interview

- ENTER an amount from [$70.00] to [$140.00]
- DO NOT INCLUDE amount for cell phone payment here – cell phone payment must be recorded separately at the next screen.
- The standard amount for the main PSID interview is [$70.00]

$70.00– 140.00

RPAY9C2. How much, if any, was the Respondent payment for cell phone use?

- ENTER either $0.00 or $10.00
- The standard payment for cell phone use is $10.00

$0.00; $10.00  → GO TO RPAY9 HARD CHECK

RPAY9C2 SOFT CHECK (SUPPRESS=continue, CLOSE/GOTO=RPAY9C2, RPAY7D).

IF RPAY7D=YES & RPAY9C2=$0:

INTERVIEW WAS COMPLETED USING CELL PHONE and CELL PHONE PAYMENT HAS BEEN OFFERED.
Cash payments: RECORD amount paid for cell phone use

Special Handling
RPAY9D. Please indicate the type(s) of special handling needed.

- ENTER all that apply


ASK RPAY9DAMT 7. Other-specify
ASK RPAY9DADDR ASK RPAY9DSPEC

IF SELECTED ALONE, GO TO RPAY9 HARD CHECK

RPAY9D SOFT CHECK (SUPPRESS=continue, CLOSE/GOTO=RPAY9D, RPAY7D).

IF RPAY7D=YES & RPAY9D<>CELL PHONE:

INTERVIEW WAS COMPLETED USING CELL PHONE and CELL PHONE PAYMENT HAS BEEN OFFERED.

Special Handling – Non-standard Amount
RPAY9DAMT. How much was the Respondent payment for this interview?

- ENTER an amount from [$70.00] to [$140.00]
- 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”

$65.00 – 130.00

Special Handling – Other specify
RPAY9DSPEC. Please specify other special handling needed

- But, go back to temporary address to record address where payment should be sent

String 500

Special Handling – Temporary Address (AddrType=8)
RPAY9DADDR.TITLE. What is that name and address?

- Title -- e.g. “Mr”, “Mrs”, “Ms”, “Miss”, “Dr”
- If no title, PRESS [Enter] to continue

String 6
RPAY9DADDR.NAMF. First Name
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]
String 20

RPAY9DADDR.NAML. Last Name
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]
String 20

RPAY9DADDR.SUFFIX. Suffix -- e.g. “Sr”, “Jr
- If none, PRESS [Enter] to continue
String 3

RPAY9DADDR.INCO. In Care Of
- If none, PRESS [Enter] to continue
String 40

RPAY9DADDR.ADDR1. Address 1
- IF there is a street address and PO Box: Enter street address here and Enter PO Box in Address 2
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]
String 40

RPAY9DADDR.APTSTE. Apt/Suite
- If none, PRESS [Enter] to continue
String 10

RPAY9DADDR.ADDR2. Address 2
- IF there is a street address and PO Box: Enter PO Box here
- If none, PRESS [Enter] to continue
String 40

RPAY9DADDR.CITY. City
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]
String 40

RPAY9DADDR.STATE; STATEABBREV. State
- Start typing the name of the State to bring up the look-up list
- If foreign country, ENTER [FOR] to select “Foreign Country”
String 30; String 4; State Lookup List. State  Foreign Country DK/RF → GO TO DUSTCKPT
↓  ↓
Dust 2013 Project
DUSTCKPT. CAI CHECKPOINT: WHETHER HEAD OR WIFE/"WIFE" IS 60 YEARS OR OLDER BY 12/31/2012 (CYYRBRN < 1953)

1. H OR W/"W" CYYRBRN<1953 5. H AND W/"W" CYYRBRN>=1953 → GO TO SSACKPT

DUSTINTRO. If this is a Spanish interview, DO NOT READ question - ENTER [8] to continue
I see that R=HEAD, WIFE/"WIFE": you / R=OFUM, PROXY: [HEAD]) [W/"W" in FU: and [R=HEAD, WIFE/"WIFE":[SPouse/"SPouse"] / R=OFUM, PROXY: [WIFE/"WIFE"]][are / is] eligible to participate in a special interview we are offering on health, wellbeing and daily life. One of our interviewers will be contacting [you / him / her / them] in a few weeks with details.
- Please code R's REACTION to hearing about the DUST study
- If R has questions or wants more information, see F1-Help
- ENTER all that apply - Do not probe any others

R=HEAD, WIFE/"WIFE"  R=OFUM, PROXY

1. No reluctance or refusal
3. R seems a little reluctant to participate
5. R absolutely refuses to participate
6. [H+W/"W" in FU : R says spouse/partner is likely to be reluctant]
7. [H+W/"W" in FU : R says spouse/partner is likely to refuse]
8. Spanish interview

DK/RF NOT ALLOWED; SELECTIONS 1 & 8 NOT ALLOWED WITH OTHER SELECTIONS; SELECTIONS 3 & 5 NOT ALLOWED TOGETHER; SELECTIONS 6 & 7 NOT ALLOWED TOGETHER

Social Security Request
SSACKPT. CAI CHECKPOINT: WHETHER FU IS ELIGIBLE FOR DUST (DUSTCKPT); WHETHER SPANISH IW (DUSTINTRO=8); WHETHER R IS ELIGIBLE FOR TA (TAELIG2013)

1. R = OFUM, PROXY
2. R=TA ELIG
3. R<>TA ELIG
4. R=TA ELIG
5. R<>TA ELIG
6. R=TA ELIG
7. R<>TA ELIG

GO TO RPAY8
SSAINTRO. And finally, understanding the financial situations of American families is an important goal of FES. We will be sending you a permission form that would allow us to get important information from the Social Security Administration. Like all information you report to FES, this information will be kept strictly confidential.

- Please code R’s REACTION to hearing about the Social Security mailing
- If R has questions or wants more information, see F1-Help

1. No reluctance or refusal
2. R seems a little reluctant
3. R absolutely refuses

DK/RF NOT ALLOWED

Thank You
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

1. Continue

Finder 1 Address (AddrType=6)
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

↓

RPAY10B.TITLE. Enter name and mailing address for Finder #1
  - Title -- e.g. “Mr”, “Mrs”, “Ms”, “Miss”, “Dr”
  - If no title, PRESS [Enter] to continue

String 6

RPAY10B.NAMF. First Name
  - Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 20

RPAY10B.NAMM. Middle Name
  - If none, PRESS [Enter] to continue

String 20

RPAY10B.NAML. Last Name
  - Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 20

RPAY10B.SUFFIX. Suffix -- e.g. “Sr”, “Jr”
  - If none, PRESS [Enter] to continue

String 3
RPAY10B.INCO.  In Care Of
  • If none, PRESS [Enter] to continue
     String 40

RPAY10B.ADDR1. Address 1
  • IF there is a street address and PO Box: Enter street address here and Enter PO Box in Address 2
  • Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]
     String 40

RPAY10B.APTSTE. Apt/Suite
  • If none, PRESS [Enter] to continue
     String 10

RPAY10B.ADDR2. Address 2
  • IF there is a street address and PO Box: Enter PO Box here
  • If none, PRESS [Enter] to continue
     String 40

RPAY10B.CITY. City
  • Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]
     String 40

RPAY10B.STATE; STATEABBREV. State
  • Start typing the name of the State to bring up the look-up list
  • If foreign country, ENTER [FOR] to select “Foreign Country”
     String 30; String 4; State Lookup List. State

RPAY10B.ZIP. Zip Code
  • If foreign country, ENTER all [0]’s
  • Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER all [0]’s
     String 10; all 8’s/9’s not allowed

RPAY10B.COUNTRY; COUNTRYABB. Country if different from USA
  • Start typing the name of the Foreign Country to bring up the look-up list
     String 30; String 2; Country Lookup List

RPAY10B2. Is there a phone number for [NAMF NAML]?
  • Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER [5]
    1. Yes   5. No
     → GO TO RPAY10GG

RPAY10C. Area Code and telephone Number
  • If foreign phone number, ENTER all [0]’s and put foreign number in next field
  • Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER all [0]’s

     ( _ _ _) _ _ _ _ _ _ _ ALL 8’s/9’s NOT ALLOWED
RPAY10D. Extension
- Enter foreign phone number in this field
- If none, PRESS [Enter] to continue
  String 20

RPAY10E. In whose name is this phone listed?
- If phone number is not listed, enter [UNLISTED]
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]
  String 40

RPAY10F. Is this a home phone, work phone, cell phone, or what?
1. Home phone or residence
2. Work phone
3. Cell phone
4. Pager
5. Fax
6. VoIP
7. Other-specify (RPAY10FSPEC. Specify [String 50])

RPAY10GG. What is (his/her) relationship to [HEAD]?
1. Mother
2. Father
3. Son
4. Daughter
5. Sister
6. Brother
7. Aunt
8. Uncle
9. Grandmother
10. Grandfather
11. Friend
12. Father-in-law
13. Mother-in-law
14. Cousin
97. Other-Specify (RPAY10GGSPEC. Specify. [String 50])

RPAY10H. 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

RPAY10I. 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 RPAY11A

GO TO RPAY11A

RPAY10J. When was the Finder paid?
- ENTER MM/DD/[CYEAR], with or without slashes
  _ / _ / [CYEAR]

Finder 2 Address (AddrType=7)
RPAY11A. Interviewer Checkpoint
- Was there a second Finder's Fee offered for this interview?
1. Yes
5. No
→ GO TO RPAY12

↓

RPAY11B.TITLE. Enter name and mailing address for Finder #2
- Title -- e.g. "Mr", "Mrs", "Ms", "Miss", "Dr"
- If no title, PRESS [Enter] to continue
  String 6
RPAY11B.NAMF. First Name
• Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]
  String 20

RPAY11B.NAMM. Middle Name
• If none, PRESS [Enter] to continue
  String 20

RPAY11B.NAML. Last Name
• Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]
  String 20

RPAY11B.SUFFIX. Suffix -- e.g. “Sr”, “Jr
• If none, PRESS [Enter] to continue
  String 3

RPAY11B.INCO. In Care Of
• If none, PRESS [Enter] to continue
  String 40

RPAY11B.ADDR1. Address 1
• IF there is a street address and PO Box: Enter street address here and Enter PO Box in Address 2
• Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]
  String 40

RPAY11B.APTSTE. Apt/Suite
• If none, PRESS [Enter] to continue
  String 10

RPAY11B.ADDR2. Address 2
• IF there is a street address and PO Box: Enter PO Box here
• If none, PRESS [Enter] to continue
  String 40

RPAY11B.CITY. City
• Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]
  String 40

RPAY11B.STATE; STATEABBREV. State
• Start typing the name of the State to bring up the look-up list
• If foreign country, ENTER [FOR] to select “Foreign Country”
  String 30; String 4; State Lookup List. State  Foreign Country  DK/RF  → GO TO RPAY11B2
RPAY11B.ZIP. Zip Code
- If foreign country, ENTER all [0]'s
- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER all [0]'s

String 10; all 8’s/9’s not allowed

RPAY11B.COUNTRY; COUNTRYABBR. Country if different from USA
- Start typing the name of the Foreign Country to bring up the look-up list

String 30; String 2; Country Lookup List

RPAY11B2. Is there a phone number for [NAMF NAML]?
- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER [5]

1. Yes  5. No  → GO TO RPAY11GG

↓

RPAY11C. Area Code and Telephone Number
- If foreign phone number, ENTER all [0]'s and put foreign number in next field
- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER all [0]'s

(_ _ _) _ _ _ _ _ _ ALL 8’s/9’s NOT ALLOWED

RPAY11D. Extension
- Enter foreign phone number in this field
- If none, PRESS [Enter] to continue

String 20

RPAY11E. In whose name is this phone listed?
- If phone number is not listed, enter [UNLISTED]
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 40

RPAY11F. Is this a home phone, work phone, cell phone, or what?

5. Fax  6. VoIP  7. Other-specify (RPAY11FSPEC. Specify (String 50))

RPAY11GG. What is (his/her) relationship to [HEAD]?


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?


GO TO RPAY12  ↓  GO TO RPAY12
RPAY11J. When was the Finder paid?
• ENTER MM/DD/[CYEAR], with or without slashes
  _ _ / _ _ / [CYEAR]

Payment Problems
RPAY12. Were there any Respondent or Finder payment problems reported by this Respondent?
  1. Yes  5. No → GO TO IWCOMPLETE

  ↓

RPAY12SPEC. Please provide details of payment issue.
  String 500
Interview Complete

Back to TOC

IWCOMPLETE. You have reached the end of the Interview.
  • ENTER [1] to complete.
    1. Interview (Module) Complete

IWPARTIAL. Is this a Completed interview or an approved Partial interview?
  • ENTER [0] for a COMPLETED interview
  • ENTER [1005] for a PARTIAL interview
    0. Completed IW  1005. Partial IW