Panel Study of Income Dynamics

Wave 43
2023

The Panel Study of Income Dynamics
The Institute for Social Research
426 Thompson Street
Ann Arbor, MI  48104

Last updated: 4/17/2023

[REFERENCE PERSON], [RP] = proper name of current Reference Person
[SPOUSE-PARTNER], [SP] = proper name of current Spouse or Partner of Reference Person
(CATI) = interviewer administered interview (telephone or in person)
(WEB) = respondent self administered web interview
Table of Contents

CATI Interview Start; Coverscreen and Family Listing .................................................................3
WEB Interview Start; Coverscreen and Family Listing .................................................................20
Section A: Housing; Utilities; Device and Internet Use .................................................................43
Section Residences .........................................................................................................................61
Section BC: Employment .................................................................................................................67
Section F: Expenditures ..................................................................................................................125
Section G: Income; OFUM Education ............................................................................................154
Section W: Wealth; Active Savings ...............................................................................................253
Section P: Pensions .......................................................................................................................279
Section H: Health ............................................................................................................................306
Section J: Marriages; Children .......................................................................................................357
Section KL: Background; Continuing Education ........................................................................422
Section M: Philanthropy; Religious Attendance ..........................................................................460
Interview Close ..............................................................................................................................471
WEB Respondent Debriefing .........................................................................................................472
Address Updates; Payment ............................................................................................................474
CATI Interview End .......................................................................................................................523
CATI Interview Start; Coverscreen and Family Listing

TOC

Interview Start

RECORDEIW RULE: Whether IW Flagged For Recording

| Flagged For Recording (RECORDEIW=1) | All Others | GO TO VOLSTMT |

RECORDEIW_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? You can still participate if you do not want your interview to be recorded.

- If R consents to the RECORDING of this interview, SELECT [Yes]
- If R does not consent to the RECORDING of this interview, SELECT [No]
- If resuming a suspended interview, RE-READ the consent and SELECT [Yes] if R agrees or [No] if R does not agree 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. The interview usually takes about 90 minutes to complete and you will receive $[PAYMENTLOAD] once you complete it.
- ENTER [1] to continue
- If resuming a suspended interview, RE-READ the voluntary statement and ENTER [1] to continue.
- If needed: I’m a very experienced and professional Interviewer, and I’ll make every effort to move the interview along quickly. I’d be glad to do the interview in smaller segments, if that would be more convenient for you.

1. Continue

FU Member Status

COVERSCREEN.CYPERSINFO.CYPINFO[1..24] [1..24]=AQSN of FU member

AQSN. Sequential ID assigned to each FU member. Assigned.

CYFUHU. FU Member Preloaded as FU (PYFUHU=1): [IWTYPE=REINT: [LOOP 1: In [P2YEAR], we had (you/[CYNAMF] [CYNAML] [[CYAQRTH]]) listed as living (here/there) as part of the family. Is that still true? / LOOP 2-24: (In [P2YEAR], we had (you/[CYNAMF]) listed as living (here/there) as part of the family.) How about (you/[CYNAMF])? (Are you/Is [CYNAMF]) currently living (here/there) as part of the family?) / IWTYPE=RECON, RECSO: [LOOP 1: Next, I’d like to know who lives (here/there) as part of the family. (Are you/Is [CYNAMF] [CYNAML]) currently living (here/there) as part of the family? / LOOP 2-24: (Next, I’d like to know who lives (here/there) as part of the family.) How about (you/[CYNAMF])? ([Are you/Is [CYNAMF]] currently living (here/there) as part of the family?)]

- 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
- Ctrl-D and Ctrl-R not allowed
All FU Members

1. FU member
6. Mover Out
7. Died

FS=Yes FU Members

8. Jail
9. Military
10. Education
11. Health
12. Other Inst

FU Member Preloaded as INSTITUTIONAL (PYFUHU=8-12, FS=YES): Is [CYNAMF] [CYNAML] still [incarcerated / in a military facility / in an educational facility / in a health facility / in an institutional facility]?
- IF NO, change CYFUHU status as follows:
  'FU-Mover In' if person has moved back into the Family Unit;
  'Mover Out' for a person who moved out to another household or to an institution;
  'Died' if person has died;
  *Institution* type listed below if person moved to an institution
- Ctrl-D and Ctrl-R not allowed

FU Member Preloaded as HUCS (PYFUHU=2): [LOOP 1: In [PYEAR], we had (you/[CYNAMF] [CYNAML] (CYAQRTH)) listed as living (here/there) and they do their own F.E.S interview. (Are you/Is [CYNAMF] still living (here/there)? / LOOP 2-24: In [PYEAR], we also had (you/[CYNAMF] [CYNAML] (CYAQRTH)) listed as living (here/there) and they do their own F.E.S interview.) How about (you/[CYNAMF] [CYNAML] (CYAQRTH)) – (are you/is [CYNAMF]) currently living (here / there)?]
- IF NO, change CYFUHU status as follows:
  'Mover Out' for a person who moved out to another household or to an institution;
  'Died' if person has died;
- Ctrl-D and Ctrl-R not allowed

New FU Members: [1st INSTANCE: Is anyone else currently living (here/there) as part of the family who I did not mention, including any newborn children? / ALL OTHERS: Is anyone else currently living (here/there) as part of the family (who I did not mention,) (including any newborn children)??]
- IF YES, select and enter CYFUHU status as follows:
  'HU Member w/ Own CS' - HU member listed on their own Reinterview CS
  'HU Member' - Living in HU, but not a member of this FU (e.g., a roommate or boarder, or someone living with the FU temporarily)
  'FU - Mover In' for a new FU Member moved into or born into the Family Unit
- PRESS [Enter] if finished adding family members
- Ctrl-D and Ctrl-R not allowed

CYAQRTH. [CYFUHU=PYFUHU]: VERIFY or update 'CYAQRTH' if you have a new Reference Person or change in marital status of Reference Person
- [CYFUHU=HUCS, HU, FUMI: ENTER relationship to current Reference Person / CYFUHU=MO, DIED, INST: DO NOT change 'CYAQRTH' if person moved out, died, or moved to some type of institution]
- Ctrl-D and Ctrl-R not allowed

101 – 982

SIGNAL for FU member age <18 who is not a child of Reference Person, Spouse-Partner or Boyfriend/Girlfriend (CYFUHU=FU, FUMI & CYAQRTH=601/2, 651/2, 701/2, 711/2, 741/2, 751/2, 951/2, 961/2, 971/2): Remember to VERIFY the parents of this child and the parents' relationship to the REFERENCE PERSON – you will be asked to record this information in the post-interview observations.

CYNAMF. [CYFUHU=PYFUHU]: FOR pre-listed persons, make any name changes indicated by the Respondent / PYFUHU=EMPTY & CYFUHU=HUCS, HU, FUMI: FOR newly listed persons, enter and verify spelling of name
- Ctrl-D and Ctrl-R not allowed; For DK/RF, type [DK] or [RF]
CYNAMM. [CYFUHU=PYFUHU: FOR pre-listed persons, make any name changes indicated by the Respondent /
PYFUHU=EMPTY & CYFUHU=HUCS, HU, FUMI: FOR newly listed persons, enter and verify spelling of name]
- Ask for Middle Name but do not probe DK or RF
- Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 10

CYNAML. [CYFUHU=PYFUHU: FOR pre-listed persons, make any name changes indicated by the Respondent /
PYFUHU=EMPTY & CYFUHU=HUCS, HU, FUMI: FOR newly listed persons, enter and verify spelling of name]
- [LOOP 2-24: Not necessary to confirm spelling of last name if it’s evident that it’s the same as a previous
  family member]
- If needed, include SUFFIX here (e.g. SR, JR)
- Ctrl-D and Ctrl-R not allowed; For DK/RF, type [DK] or [RF]

String 20 → RETURN TO CYFUHU for Next FU Member; Then GO TO FAMLISTCONFIRM
End CYPINFO

COVERSCREEN.COUNT

FAMLISTCONFIRM. Is the Family Listing Table complete?
- SELECT "YES" and continue OR go back to Family Listing Table

1. Yes

End COUNT

Move In Date

MOVEIN RULE: Whether FU Member is New or PY-INST Moved In Since 1/1/P2YEAR (Excludes HUCS & HU)

<table>
<thead>
<tr>
<th>FU Member is Mover In (IWTYPE=REINT, RECON: CYFUHU=FUMI)</th>
<th>All Others</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>→ REPEAT MOVEIN RULE for Next FU Member; Then GO TO MOVEOUT RULE</td>
</tr>
</tbody>
</table>

COVERSCREEN.MOVEIN[1..24] [1..24]=AQSNO of FU member

MOVEINMO. [IWTYPE=REINT, SO, RECSO: When did [CYNAMF] [CYNAML] ([CYAQRTH]) move in / IWTYPE=RECON: When
did [CYNAMF] [CYNAML] ([CYAQRTH]) start living (here / there) as part of the family?]
- SELECT month moved in
- PROBE DK month: Do you know what season it was?


MOVEINYR. ([IWTYPE=REINT, SO, RECSO: When did [CYNAMF] [CYNAML] ([CYAQRTH]) move in? / IWTYPE=RECON:
When did [CYNAMF] [CYNAML] ([CYAQRTH]) start living (here / there) as part of the family?]
- ENTER year moved in
- PROBE /RR/ Move-In years prior to [P2YEAR]

1901 – [CYEAR] [9996, 9997 for CS_WEB assignment] → RETURN TO MOVEIN RULE for Next FU Member;
Then GO TO MOVEOUT RULE

End MOVEIN
Move Out Date

MOVEOUT RULE: Whether Preloaded FU Member Moved Out or Became Institutional Since 1/1/P2YEAR

<table>
<thead>
<tr>
<th>FU Member is Mover Out</th>
<th>All Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>(IWTYPE=REINT, RECON: PYFUHU=FU, INST &amp; CYFUHU=MO, or PYFUHU=FU &amp; CYFUHU=INST)</td>
<td>→ REPEAT MOVEOUT RULE for Next FU Member; Then GO TO BIRTH RULE</td>
</tr>
</tbody>
</table>

COVERSCREEN.MOVEOUT[1..24] [1..24]=AQSN of FU member

MOVEOUTMO. When did [CYNAMF] [CYNAML] move out?
- SELECT month moved out
- PROBE DK month: Do you know what season it was?


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

1901 – [CYEAR] (9996, 9997 for CS_WEB assignment) → RETURN TO MOVEOUT RULE for Next FU Member; Then GO TO BIRTH RULE

End MOVEOUT

Birth Information

BIRTH RULE: Whether FU Member is Living (Includes CYFUHU=FU, FUMI, INST, HUCS & HU)

<table>
<thead>
<tr>
<th>FU Member is Living (CYFUHU&lt;&gt;DIED)</th>
<th>All Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>→ REPEAT BIRTH RULE for Next FU Member; Then GO TO DEATH RULE</td>
<td></td>
</tr>
</tbody>
</table>

COVERSCREEN.CYBIRTHINFO.CYBINFO[1..24] [1..24]=AQSN of FU member

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

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

BIRTH2 RULE: Whether Any Part of Birth Date is Not Response

CoverScreen.CYDEATHINFO.CYDINFO[1..24] [1..24]=AQSN of FU member

CYMOBRN. ([PRELOADED DOB=RESPONSE: VERIFY: We have (your / [CYNAMF] [CYNAML]’s) birthdate as [CYMOBRN] / [CYDYBRN] / [CYRBRN]. Is that correct? / PRELOADED DOB=NA & CYFUHU=FU, INST: What is (your / [CYNAMF] [CYNAML]’s) complete birthdate? / PRELOADED DOB=NA & 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=NA & CYFUHU=FU, INST: What is (your / [CYNAMF] [CYNAML]’s) complete birthdate? / PRELOADED DOB=NA & CYFUHU=HUCS, HU, FUMI: And what is (your / [CYNAMF] [CYNAML]’s) complete birthdate?])

- **UPDATE or ENTER year**
  - 1880 – [CYEAR]

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

- **IF necessary:** What is your best estimate?
  - 1 – 120 → RETURN TO BIRTH RULE for Next FU Member; Then GO TO DEATH RULE

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

  1. Yes  
  5. No

RETURN TO BIRTH RULE for Next FU Member; Then GO TO DEATH RULE

End CYBINFO

Death Information

DEATH RULE: Whether Preloaded FU Member Has Died

CoverScreen.CYDEATHINFO.CYDINFO[1..24] [1..24]=AQSN of FU member

CYMOBRN. [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. / 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? / PRELOADED DOB=NA: What is [CYNAMF] [CYNAML]’s complete birthdate?]  

- **UPDATE or ENTER month**
  - 1. January
  - 2. February
  - 3. March
  - 4. April  
  - 5. May
  - 6. June
  - 7. July
  - 8. August
  - 9. September  
  - 10. October  
  - 11. November  
  - 12. December

CoverScreen.CYDEATHINFO.CYDINFO[1..24] [1..24]=AQSN of FU member
CYDYBRN. ([PRELOADED DOB=RESPONSE: VERIFY: We have [CYNAMF] [CYNAML]'s birthdate as [CYMOBRN] / [CYDYBRN] / [CYYRBRN]. Is that correct? / PRELOADED DOB=NA: 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] / [CYYRBRN]. Is that correct? / PRELOADED DOB=NA: What is [CYNAMF] [CYNAML]'s complete birthdate?])

- UPDATE or ENTER year
  
  1880 – [CYEAR]

DEATH2 RULE: Whether Any Part of Birth Date is Not Response

\[
\text{CY(MO, DY, YR)BRN = DK, RF \quad \text{All Others} \quad \rightarrow \text{GO TO BIRTHST}}
\]

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

- IF necessary: What is your best estimate?
  
  1 – 120

BIRTHST (BIRTHSTABBRR). What state was [CYNAMF] [CYNAML] born in?

- ENTER [57] for a foreign country
  
  Select 1 – 57

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 (DEATHSTABBRR). What state was [CYNAMF] [CYNAML] residing in at the time of (his/her) death?

- ENTER [57] for a foreign country
  
  Select 1 – 57

RETURN TO DEATH RULE for Next FU Member; Then GO TO MARITAL RULE

End CYDINFO
Marital Status

MARITAL RULE: Whether FU Member is 15 Years Old or Older (Includes FU & FUMI Only)

<table>
<thead>
<tr>
<th>FU Member is 15+ Years Old</th>
<th>All Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>CYFUHU=FU, FUMI &amp; AGEIWDATE=15-120</td>
<td>→ REPEAT MARITAL RULE for Next FU Member; Then GO TO MSCONFIRM</td>
</tr>
</tbody>
</table>

COVERSCREEN.MARRSTAT.MSTAT[1..24] [1..24]=AQSN of FU member

MARITAL. [RP (SP) LOOP: VERIFY or ASK:] What is (your/[CYNAMF] [CYNAML]’s) current marital status? (Are you/[Is he / Is she]) now 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]) now widowed, divorced, separated, or (have you/[has he / has she]) never been married?


↓  RETURN TO MARITAL RULE for Next FU Member; Then GO TO MSCONFIRM

SPOUNAM. [RP (SP) LOOP: 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

→ RETURN TO MARITAL RULE for Next FU Member; Then GO TO MSCONFIRM

End MSTAT

MSCONFIRM. Is the Marital Status Information Table complete?

- SELECT "YES" and continue OR go back to Marital Status Information Table

1. Yes

HU & HUCS Information

HUCS RULE: Whether Any FU Member is HUCS or HU

<table>
<thead>
<tr>
<th>FU Member is HU (CYFUHU=3)</th>
<th>FU Member is New HUCS (PYFUHU=EMPTY &amp; CYFUHU=2)</th>
<th>Preloaded HUCS (CYFUHU=2 &amp; PYFUHU=2)</th>
<th>All Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Assign HUCS_ID=PYPERSINO.HUCSID)</td>
<td>GO TO HUCS_ID</td>
<td>REPEAT HUCS RULE for Next FU Member; Then GO TO MOHHGRP1 RULE</td>
<td></td>
</tr>
</tbody>
</table>

COVERSCREEN.HUNOTFU[1..24] [1..24]=AQSN of FU member

HUREASON. 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

RETURN TO HUCS RULE for Next FU Member; Then GO TO MOHHGRP1 RULE

End HUNOTFU
COVERSCREEN.HUCSSAMPID.SIDHUCS[1..24] [1..24]=AQSNS of FU members

HUCS_ID. REFER to the Family Listing sheet for this 68ID
- ENTER the Sample IDs of all other FU(s) living in this household
- ENTER Sample ID including the dash (e.g., 1234-567)
- Ctrl-D and Ctrl-R not allowed; For DK/RF, ENTER all [0]'s

String 8 → RETURN TO HUCS RULE for Next FU Member; Then GO TO MOHHGRP1 RULE

End SIDHUCS

Mover-Out Groups

MOHHGRP1 RULE: Whether Any FU Member Has Moved Out since 1/1/P2YEAR

<table>
<thead>
<tr>
<th>1+ Valid Mover Out</th>
<th>All Movers Out are Invalid</th>
<th>No Movers Out</th>
</tr>
</thead>
<tbody>
<tr>
<td>(FS=Yes &amp; PYFUHU=FU, INST &amp; CYFUHU=MO)</td>
<td>(FS=No &amp; CYFUHU=MO; or FS=Yes &amp; PYFUHU=HUCS &amp; CYFUHU=MO)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>GO TO INST RULE</td>
</tr>
</tbody>
</table>

MOHHGRP1. Mover-Out Household Grouping 1
1 MO: Only one person with ‘Follow Status = Yes’ has moved out of the FU.
- SELECT that person as “MOHHGrp1” and [ENTER] to continue
/ 2 MO: 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+ MO: 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.)
- Ctrl-D and Ctrl-R not allowed

1–24. [CYNAMF] [CYNAML] [(FS=Yes)] AQSNS list of Movers Out (CYFUHU=MO & PYFUHU=FU, INST)

MOHHGRP2[2..8]. Mover-Out Household Grouping [2–8]
1 MO REMAINS: Only one Mover-Out remains
- SELECT that person as “MOHHGrp2[2–8]” and [ENTER] to continue
/ 2+ MO REMAIN: 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 “MOHHGrp2[2–8]”, then [ENTER] to continue
- IF NO: Select each person into their own individual groupings (MOHHGrp2, MOHHGrp3, etc.)
- Ctrl-D and Ctrl-R not allowed

1–24. [CYNAMF] [CYNAML] [(FS=Yes)] AQSNS list of remaining Movers Out (CYFUHU=MO & PYFUHU=FU, INST)
Respondent

SPLITOFFR RULE: Whether This MOHHGRP Includes an FS=Yes FU Member

At Least One Mover Out is FS=Yes All Others \( \Rightarrow \) GO TO MOHHGRP END RULE

SPLITOFFR\([1..8]\). SELECT one adult age 18 or older as probable Respondent for this household.

- IF there are no adults (age 18 or older) listed, SELECT oldest child with “FS = YES”

\[1–24. \text{[CYNAMF]} \text{[CYNAML], Age [AGEIWDATE]} \text{[FS=Yes]}] \quad \text{AQS}N \text{ list of MOHHGRP FU Members}

MOHHGRP END RULE: Whether There Are More Movers-Out To Be Assigned To A MOHHGRP

More Movers Out \( \Rightarrow \) REPEAT MOHHGRP\([2..8]\) for Remaining Movers Out; Then GO TO SOCHLIVE RULE

No Adults (SOChLive)

SOCHLIVE RULE: Whether This MOHHGRP Includes an FS=Yes Mover Out; Age of SPLITOFFR

- At Least One Mover Out is FS=Yes
- SPLITOFFR\(=\)Age 18+
- SPLITOFFR < Age 18

\( \Rightarrow \) \(\text{(Assign SOINDICATOR}[1..8]=5)\) REPEAT SOCHLIVE RULE for MOHHGRP; Then GO TO INST RULE

COVERSCREEN.SOCHLIVE\([1..8]\) \([1..8]\)=Which Mover-Out group

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

- ENTER First Name
- Ctrl-D and Ctrl-R not allowed; For DK/RF, type [DK] or [RF]

String 20

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

- ENTER Last Name
- If needed, include SUFFIX here (e.g. SR, JR)
- Ctrl-D and Ctrl-R not allowed; For DK/RF, type [DK] or [RF]

String 25

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

- ENTER Relationship
- Ctrl-D and Ctrl-R not allowed; For DK/RF, type [DK] or [RF]

String 100

End SOCHLIVE
Contact Information

COVERSCREEN.MOADRESS[1..8] [1..8]=Which Mover-Out group

MOINCO, MOADDR1, MOAPTSTE, MOADDR2, MOCITY, MOCOUNTRY (MOCTRYNAME), MOSTATE (MOSTATEABBR), MOZIP.

Address Update for * Mover Out *

[AGEIWDATE<18: SplitOff Child, [CYNAMF] [CYNAML], is living with [PERSNAMF] [PERSNAML]]

[AGEIWDATE<18: 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?]

• If none, PRESS [Enter] to continue
• Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 40
What is the street address?

• If there is a street address and a PO Box: ENTER street address here (Address 1) and ENTER PO Box in Address 2
• Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 40
(Is there an apartment or suite number?)

• If none, PRESS [Enter] to continue
• Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 10
(What is the street address?)

• If none, PRESS [Enter] to continue
• If there is a street address and a PO Box: ENTER PO Box here (Address 2)
• Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 40
What is the City?

• Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 40

• IF other than USA: What is the Country?
• ENTER [185 UNITED STATES] for Puerto Rico, U.S. Virgin Islands, Guam, American Samoa or the Northern Mariana Islands

Select \( \downarrow \) 1 – 193 (Defaults to 185/US)

What is the State? (For COUNTRY=185)

Select \( \downarrow \) 1 – 57 (Assigned 57/FC if Country<>185)

What is the Zip code?

• Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER all [0]'s

String 10
WTRCELL. Cell Phone for * Mover Out *

[AGEIWDATE<18: SplitOff Child, [CYNAMF] [CYNAML], is living with [PERSNAMF] [PERSNAML]]

Does [AGE 18+: [CYNAMF] [CYNAML] / AGEIWDATE<18: [PERSNAMF] [PERSNAML]] have a cell phone?
- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER [5]

1. Yes 5. No → GO TO WTRHOME

CELLPH. Cell Phone for * Mover Out *

[SplitOff Child, [CYNAMF] [CYNAML], is living with [PERSNAMF] [PERSNAML]]

What is the area code and phone number?
- If foreign phone, PRESS [ENTER] to go to foreign phone field
- Ctrl-D and Ctrl-R not allowed; For DK/RF, GO BACK and ENTER [5] at WtrCell

[ENTER] (_ _ _) _ - _ _ _ → GO TO WTRHOME

CELLFOR. Cell Phone for * Mover Out *

[SplitOff Child, [CYNAMF] [CYNAML], is living with [PERSNAMF] [PERSNAML]]

(What is the area code and phone number?)
- Ctrl-D and Ctrl-R not allowed; For DK/RF, GO BACK and ENTER [5] at WtrCell

String 20

WTRHOME. Home Phone for * Mover Out *

[SplitOff Child, [CYNAMF] [CYNAML], is living with [PERSNAMF] [PERSNAML]]

Does [[CYNAMF] [CYNAML] / [PERSNAMF] [PERSNAML]] have a home phone?
- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER [5]

1. Yes 5. No → GO TO MOEMAIL RULE

HOMEPH. Home Phone for * Mover Out *

[SplitOff Child, [CYNAMF] [CYNAML], is living with [PERSNAMF] [PERSNAML]]

What is the area code and phone number?
- If foreign phone, PRESS [ENTER] to go to foreign phone field
- Ctrl-D and Ctrl-R not allowed; For DK/RF, GO BACK and ENTER [5] at WtrHome

[ENTER] (_ _ _) _ - _ _ _ → GO TO MOEMAIL RULE

HOMEFOR. Home Phone for * Mover Out *

[SplitOff Child, [CYNAMF] [CYNAML], is living with [PERSNAMF] [PERSNAML]]

(What is the area code and phone number?)
- Ctrl-D and Ctrl-R not allowed; For DK/RF, GO BACK and ENTER [5] at WtrHome

String 20

MOEMAIL RULE: Age of SPLITOFFR

SPLITOFFR = Age 18+ SPLITOFFR < Age 18 → GO TO SOMARST RULE

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 RULE
MOEMAILADDR. Address Update for * Mover Out *
(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 go back and ENTER [Ctrl-D, Ctrl-R] at previous question

MOEMAIL2. Address Update for * Mover Out *
Is there another e-mail address where we can contact [CYNAMF] [CYNAML]?
1. Yes 5. No → GO TO SOMARSTAT RULE

MOEMAIL2ADDR. Address Update for * Mover Out *
(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 go back and ENTER [Ctrl-D, Ctrl-R] at previous question

End MOADDRESS

R is Adult [Marital, LivOwnHH, SIDMove]

SOMARST RULE: Age of SPLITOFFR

\[
\text{SPLITOFFR} = \begin{cases} 
\text{Age 18+} & \text{if SPLITOFFR} \geq \text{Age 18+} \\
\text{SPLITOFFR < Age 18} & \text{if SPLITOFFR < Age 18} 
\end{cases} \rightarrow \text{GO TO DIFFPANFU}
\]

COVERSCREEN.SOMARSTAT[1..8] [1..8]=Which Mover-Out group

SOMARST. Is [he / she] married, widowed, divorced, separated, or never married?
- If R says Single, PROBE: Does that mean [he / she] is now widowed, divorced, separated, or has [he / she] never been married?

GO TOLIVOWNHH

SPOUNAMF. [MO=PRELOADED RP (SP): VERIFY spouse name - Ask R only if you are unclear about the answer:] What is [CYNAMF] [CYNAML]’s spouse’s name?
- ENTER First Name
- Ctrl-D and Ctrl-R not allowed; For DK/RF, type [DK] or [RF]

String 20

SPOUNAML. [MO=PRELOADED RP (SP): VERIFY spouse name - Ask R only if you are unclear about the answer:] What is [CYNAMF] [CYNAML]’s spouse’s name?
- ENTER Last Name
- If needed, include SUFFIX here (e.g. SR, JR)
- Ctrl-D and Ctrl-R not allowed; For DK/RF, type [DK] or [RF]

String 25
LIVOWNHH. Have they set up their own household, have they moved in with another F.E.S. (Family Economics Study) family, or have they moved in with a family not in F.E.S.?

- **By 'set up their own household', we mean they are financially independent.**
- **If R says “living with someone else”, probe: Is that with another F.E.S. (Family Economics Study) family, a family not in F.E.S., or have they set up their own household?**
- **Ctrl-D and Ctrl-R not allowed**

1. Yes, set-up own household
2. Moved to a household not in study
3. Moved to an institution (military, education, health, other institution)
4. Moved to a household in study

*(Assign SOINDICATOR[1..8]=1) (Assign SOINDICATOR[1..8]=1) (Assign SOINDICATOR[1..8]=2)*

**CHECK:** 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.

**RETURN TO SOCHLIVE RULE for Next MOHHGRP; Then GO TO INST RULE**

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

- **Enter First Name**
- **Ctrl-D and Ctrl-R not allowed; For DK/RF, type [DK] or [RF]**

*String 20*

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

- **Enter Last Name**
- **If needed, include SUFFIX here (e.g. SR, JR)**
- **Ctrl-D and Ctrl-R not allowed; For DK/RF, type [DK] or [RF]**

*String 25*

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

- **Enter Relationship**
- **Ctrl-D and Ctrl-R not allowed; For DK/RF, type [DK] or [RF]**

*String 100*

**SIDMOVE RULE:** Whether MOHHGRP Moved in with a FES Family

*Moved to FES Family (LIVOWNHH=4) All Others* → **RETURN TO SOCHLIVE RULE for Next MOHHGRP; Then GO TO INST RULE**

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

- **Enter Sample ID including the dash (e.g., 1234-567)**
- **Ctrl-D and Ctrl-R not allowed; For DK/RF, ENTER all [0]'s**

*String 8* → **RETURN TO SOCHLIVE RULE for Next MOHHGRP; Then GO TO INST RULE**

End SOMARSTAT
R is Child (DifPanFU, SIDMove)

COVERSCREEN.SOCHOTHFU[1..8] [1..8]=Which Mover-Out group

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
    (Assign SOINDICATOR[1..8]=1)

SIDMOVE. ENTER Sample ID of the family unit into which [CYNAMF] [CYNAML] has moved.
  •  ENTER Sample ID including the dash (e.g., 1234-567)
  •  Ctrl-D and Ctrl-R not allowed; For DK/RF, ENTER all [0]'s
    String 8  → RETURN TO SOCHLIVE RULE for Next MOHHGRP; Then GO TO INST RULE

End SOCHOTHFU

Institutional Contact Information

INST RULE: Whether Any FU Member Moved to Institution

<table>
<thead>
<tr>
<th>FU Member is Institutional (IWTYPE=REINT, RECON: PYFUHU=FU, INST &amp; CYFUHU=INST)</th>
<th>All Others</th>
<th>→ RESPEAT INST RULE for Next FU Member; Then GO TO RSELECT</th>
</tr>
</thead>
</table>

COVERSCREEN.INSTADDRESS[1..24] [1..24]=AQS of FU member

INSTINCO, INSTADDR1, INSTAPTSTE, INSTADDR2, INSTCITY, INSTCOUNTRY (INSTCTRYNAME), INSTSTATE (INSTSTATEABBR), INSTZIP. Address Update for Institutional *[Prison/Military/Education/Health/Other]* [AGEIWDATE<18: Institutional is a Child, [CYNAMF] [CYNAML]]

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
  •  Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 40

What is the street address?
  •  If there is a street address and a PO Box: ENTER street address here (Address 1) and ENTER PO Box in Address 2
  •  Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 40

(Is there an apartment or suite number?)
  •  If none, PRESS [Enter] to continue
  •  Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 10
(What is the street address?)
- If none, PRESS [Enter] to continue
- If there is a street address and a PO Box: ENTER PO Box here (Address 2)
- Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 40

What is the City?
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 40

- IF other than USA: What is the Country?
- ENTER [185 UNITED STATES] for Puerto Rico, U.S. Virgin Islands, Guam, American Samoa or the Northern Mariana Islands

Select \( \sqrt{1} - 193 \) (Defaults to 185/US)

What is the State? (For COUNTRY=185)
Select \( \sqrt{1} - 57 \) (Assigned 57/FC if Country<>185)

What is the Zip code?
- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER all [0]'s

String 10

WTRCELL. Cell Phone for Institutional *[Prison / Military / Education / Health / Other]*
[AGEIWDATE<18: Institutional is a Child, [CYNAMF] [CYNAML]]
[AGEIWDATE=18+: Does [CYNAMF] [CYNAML] have a cell phone / AGEIWDATE<18: Is there a cell phone where we can contact [CYNAMF] [CYNAML]]?
- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER [5]

1. Yes 5. No → GO TO WTRHOME

CELLPH. Cell Phone for Institutional *[Prison / Military / Education / Health / Other]*
[Institutional is a Child, [CYNAMF] [CYNAML]]
What is the area code and phone number?
- If foreign phone, PRESS [ENTER] to go to foreign phone field
- Ctrl-D and Ctrl-R not allowed; For DK/RF, GO BACK and ENTER [5] at WtrCell

[ENTER] \( ( \_ \_ \_ )\_\_\_\_\_\_ \) → GO TO WTRHOME

CELLFOR. Cell Phone for Institutional *[Prison / Military / Education / Health / Other]*
[Institutional is a Child, [CYNAMF] [CYNAML]]
(What is the area code and phone number?)
- Ctrl-D and Ctrl-R not allowed; For DK/RF, GO BACK and ENTER [5] at WtrCell

String 20
WTRHOME. Home Phone for Institutional *[Prison / Military / Education / Health / Other]*
[Institutional is a Child, [CYNAMF] [CYNAML]]
[Does [CYNAMF] [CYNAML] have a home phone / Is there a home phone where we can contact [CYNAMF] [CYNAML]]?
- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER [S]
1. Yes 5. No → GO TO INSTEMAIL RULE

HOMEPH. Home Phone for Institutional *[Prison / Military / Education / Health / Other]*
[Institutional is a Child, [CYNAMF] [CYNAML]]
What is the area code and phone number?
- If foreign phone, PRESS [ENTER] to go to foreign phone field
- Ctrl-D and Ctrl-R not allowed; For DK/RF, GO BACK and ENTER [S] at WtrHome
[ENTER] (_ _ _) _ _ _ _ → GO TO INSTEMAIL RULE

HOMEFOR. Home Phone for Institutional *[Prison / Military / Education / Health / Other]*
[Institutional is a Child, [CYNAMF] [CYNAML]]
(What is the area code and phone number?)
- Ctrl-D and Ctrl-R not allowed; For DK/RF, GO BACK and ENTER [S] at WtrHome
String 20

INSTEMAIL RULE: Age of Institutional

<table>
<thead>
<tr>
<th>18+ Years Old</th>
<th>Less than 18 Years Old</th>
<th>→ REPEAT INST RULE for Next FU Member; Then GO TO RSELECT</th>
</tr>
</thead>
</table>

INSTEMAIL. Address Update for Institutional *[Military / Education / Health / Other]*
Is there an e-mail address where we can contact [CYNAMF] [CYNAML]?
1. Yes 5. No → RETURN TO INST RULE for Next FU Member; Then GO TO RSELECT

INSTEMAILADDR. Address Update for Institutional *[Military / Education / Health / Other]*
(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 go back and ENTER [Ctrl-D, Ctrl-R] at previous question
String 50

INSTEMAIL2. Address Update for Institutional *[Military / Education / Health / Other]*
Is there another e-mail address where we can contact [CYNAMF] [CYNAML]?
1. Yes 5. No → RETURN TO INST RULE for Next FU Member; Then GO TO RSELECT

INSTEMAIL2ADDR. Address Update for Institutional *[Military / Education / Health / Other]*
(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 go back and ENTER [Ctrl-D, Ctrl-R] at previous question
String 50 → RETURN TO INST RULE for Next FU Member; Then GO TO RSELECT

End INSTADDRESS
Respondent Selection & FU 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], [C YAQRTH], [CYFUHU] AQS N list of RP & SP, and OFUMs age 18+

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

SIGNAL for RSELECT=RP or SP & AGEEIWDATE<18: This person is less than 18 years old. SUSPEND this interview and code this sample line as 9007.

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: [CYNAMF] [CYNAML]
Relationship to Reference Person: [C YAQRTH]
FU Status: [CYFUHU]
[1–24]. [CYNAMF] [CYNAML], [C YAQRTH], [CYFUHU], [MARITAL], Birthdate: [DOB] AQSN list of FU Members

- ENTER [1] to confirm family listing and continue

1. Confirm

GO TO SECTION A

End COVERSSCREEN
WEB Interview Start; Coverscreen and Family Listing

CS_WEB

Interview Start

LANG_W. This interview is in English.

If you prefer to do your interview in Spanish, a Spanish interview will be available in early summer. An interviewer will contact you as soon as it’s available.

If you prefer to do your interview in a language other than English or Spanish, an interviewer will contact you as soon as possible.

Please indicate which language you prefer for this interview.

1. English  NA (Assigned 8/DK)  2. Spanish  7. Other - Please specify: (LANGWSPEC (String 100))

GO TO END PAGE & SUSPEND IW

For Spanish DM: Revise routing of code 2. Spanish to WELCOME and remove added language

Other: (Thank you. An interviewer will be in contact with you soon. If you have any questions, please contact us at uofmsurvey@umich.edu or 1-866-796-5166.)

WELCOME. Welcome to the 2023 Family Economics Study (FES).

For best results, use the ‘Next’ and ‘Previous’ buttons instead of ‘Enter’ and ‘Tab’ which may work differently with some browsers.

If you decide at any point that you’d rather speak with an interviewer please contact us at uofmsurvey@umich.edu or 1-866-796-5166.

Please click Next to continue.

1. Next

CS_WEB.FAMILYCOMP

Respondent Selection

RSELECTWEB. Please tell us who you are.

To do this interview, you must be 18 years old or older.

Family member

[1–24]. [CYNAMF] [CYNAMM] [CYNAML]  97. Someone else  → GO TO END PAGE & SUSPEND IW

(Thank you. An interviewer will be in contact with you soon. If you have any questions, please contact us at uofmsurvey@umich.edu or 1-866-796-5166.)

CHECK for NA: In order for the interview to continue, it is important for us to know who is completing it.

VERIFYR_BDATE. For verification purposes, could you please tell us your birthdate?

Please enter as MM/DD/YYYY.

MM/DD/YYYY  Date of Birth
CONFIRM_BDATE RULE: Whether Year Born Matches Preloaded Year Born +/- 2 Years

<table>
<thead>
<tr>
<th>Year Born=Preload</th>
<th>All Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>(VERIFYR_BDATE (year) = PYPERSINFO.PYYRBRN +/- 2 years)</td>
<td>(VERIFYR_BDATE=NA; or VERIFYR_BDATE (year) ≠ PYPERSINFO.PYYRBRN +/- 2 years)</td>
</tr>
</tbody>
</table>

CONFIRM_BDATE. You entered [VERIFYR_BDATE] as your birthdate. If that is correct, please click Next. If you need to make corrections, please do so below and then click Next.

*Please enter as MM/DD/YYYY.*

_MM/DD/YYYY_ Date of Birth

VALIDCKPT. CAI Checkpoint: Whether Year Born Matches Preloaded Year Born +/- 2 Years

<table>
<thead>
<tr>
<th>1. Year Born=Preload</th>
<th>5. All Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>(VERIFYR_BDATE (year) or CONFIRM_BDATE (year) = PYPERSINFO.PYYRBRN +/- 2 years)</td>
<td>(VERIFYR_BDATE &amp; CONFIRM_BDATE = NA; or VERIFYR_BDATE (year) &amp; CONFIRM_BDATE (year) ≠ PYPERSINFO.PYYRBRN +/- 2 years)</td>
</tr>
</tbody>
</table>

GO TO END PAGE & SUSPEND IW

(Thank you. An interviewer will be in contact with you soon. If you have any questions, please contact us at uofmsurvey@umich.edu or 1-866-796-5166.)

VOLSTMT_WEB. This interview is completely voluntary and confidential. The information you provide online is secure. You are issued with a unique log-in for the survey. The information you give us is downloaded on to secure servers and fully protected and kept confidential. The interview usually takes about 90 minutes to complete and you will receive $[PAYMENTLOAD] once you complete it. Your responses are extremely important. We rely on you to read each question and answer thoughtfully.

Please click Next to continue.

1. Next

FU Member Status

CONFIRMFUHU RULE: Whether Respondent is Only FU Member

<table>
<thead>
<tr>
<th>1 Preloaded FU Member</th>
<th>2+ Preloaded FU Members</th>
</tr>
</thead>
</table>

GO TO CURRENTLOCATION RULE

CS_WEB.FAMILYCOMP.CONFIRMFU[1..24][1..24]=AQSNOF FU member

CONFIRMATIONFU. Before we get started, we’d like to verify who is NOW living with you as part of your family. Are the following family members still living with you as part of your family?

*Please select Yes or No for each person listed.*

<table>
<thead>
<tr>
<th>Family member</th>
<th>Age</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>[CYNAMF] [CYNAMM] [CYNAML]</td>
<td>[AGE]</td>
<td>1</td>
<td>5</td>
</tr>
</tbody>
</table>

AQSNOF FU Members w/PYFUHU=1 or 2 (except R)

End CONFIRMFU
CS_WEB.FAMILYCOMP.CONFIRMEDU[1..24] = AQSN of FU member
CONFIRMATIONEDU. Are the following family members still living away at school?
Please select Yes or No for each person listed.

<table>
<thead>
<tr>
<th>Family member</th>
<th>Age</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>[CYNAMF] [CYNAMM] [CYNAML]</td>
<td>[AGE]</td>
<td>1</td>
<td>5</td>
</tr>
</tbody>
</table>

AQSN list of FU Members w/PYFUHU=10 (except R)
End CONFIRMEDU

CS_WEB.FAMILYCOMP.CONFIRMMIL[1..24] = AQSN of FU member
CONFIRMMIL. Are the following family members still living in a military facility?
Please select Yes or No for each person listed.

<table>
<thead>
<tr>
<th>Family member</th>
<th>Age</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>[CYNAMF] [CYNAMM] [CYNAML]</td>
<td>[AGE]</td>
<td>1</td>
<td>5</td>
</tr>
</tbody>
</table>

AQSN list of FU Members w/PYFUHU=9 (except R)
End CONFIRMMIL

CS_WEB.FAMILYCOMP.CONFIRMHEALTH[1..24] = AQSN of FU member
CONFIRMATIONHEALTH. Are the following family members still living in a health facility?
Please select Yes or No for each person listed.

<table>
<thead>
<tr>
<th>Family member</th>
<th>Age</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>[CYNAMF] [CYNAMM] [CYNAML]</td>
<td>[AGE]</td>
<td>1</td>
<td>5</td>
</tr>
</tbody>
</table>

AQSN list of FU Members w/PYFUHU=11 (except R)
End CONFIRMHEALTH

CS_WEB.FAMILYCOMP.CONFIRMINST[1..24] = AQSN of FU member
CONFIRMINST. Are the following family members still living in an institutional facility such as the Peace Corps or a religious order?
Please select Yes or No for each person listed.

<table>
<thead>
<tr>
<th>Family member</th>
<th>Age</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>[CYNAMF] [CYNAMM] [CYNAML]</td>
<td>[AGE]</td>
<td>1</td>
<td>5</td>
</tr>
</tbody>
</table>

AQSN list of FU Members w/PYFUHU=12 (except R)
End CONFIRMINST

CS_WEB.FAMILYCOMP.CONFIRMJAIL[1..24] = AQSN of FU member
CONFIRMJAIL. Are the following family members still incarcerated?
Please select Yes or No for each person listed.

<table>
<thead>
<tr>
<th>Family member</th>
<th>Age</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>[CYNAMF] [CYNAMM] [CYNAML]</td>
<td>[AGE]</td>
<td>1</td>
<td>5</td>
</tr>
</tbody>
</table>

AQSN list of FU Members w/PYFUHU=8 (except R)
End CONFIRMJAIL

CS_WEB.FAMILYCOMP.FUSTATUSCHANGED[1..24] = AQSN of FU member
CURRENTLOCATION RULE: Whether FU Member’s FUHU Status Changed

FUHU Changed (Q1A–Q1F=No)  FUHU Not Changed (Q1A–Q1F=Yes, NA)  → (Assign CYFUHU=PYFUHU)

GO TO CURRENTLOCATION END RULE

FUAQSN. AQSN of FU member. Assigned.
CURRENTLOCATION. Where is [CYNAMF] [CYNAMM] [CYNAML] now?

1. Living here as part of the family
2. Living on his/her own [PYFUHU<>HUCS: or with another family that does NOT do their own F.E.S. interview]
3. Living with a family that does their own F.E.S interview
4. In the armed forces
5. Away at school
6. In a health care facility
7. In jail or prison
8. In some other institution, such as the Peace Corps or a religious order
9. Passed away; died

CHECK for NA: In order for the interview to continue, please tell us where this family member is now.

MOVE RULE: Whether Institutional Moved Back In, or FU Moved Out or Became Institutional

CS_WEB.FAMILYCOMP.FUSTATUSCHANGED[1..24].MOVEIN [1..24]=AQSNO of FU member

MOVEINWEB_YR. When did [CYNAMF] [CYNAMM] [CYNAML] move [back] in with your family?

Select ▼ Year [CYEAR] – [P4YEAR]

9996. [P2YEAR]-[CYEAR] but don’t know which year
9997. Before [P2YEAR] but don’t know exact year

(Assign (COVERSCREEN.MOVEIN[1..24]) MOVEINMO=99 & MOVEINYR=MOVEINWEB_YR)

GO TO CURRENTLOCATION END RULE

End MOVEIN

CS_WEB.FAMILYCOMP.FUSTATUSCHANGED[1..24].MOVEOUT [1..24]=AQSNO of FU member

MOVEOUTWEB_YR. When did [CYNAMF] [CYNAMM] [CYNAML] move out?

Select ▼ Year [CYEAR] – [P4YEAR]

9996. [P2YEAR]-[CYEAR] but don’t know which year
9997. Before [P2YEAR] but don’t know exact year

(Assign (COVERSCREEN.MOVEOUT[1..24]) MOVEOUTMO=99 & MOVEOUTYR=MOVEOUTWEB_YR)

GO TO CURRENTLOCATION END RULE

End MOVEOUT

CURRENTLOCATION END RULE: Whether There are More Preloaded FU Members

More FU Members → RETURN TO CURRENTLOCATION RULE

No More FU Members

End FUSTATUSCHANGED
Mover-Out Groups

MOHHINTRO1 RULE: Whether Any FU Members Moved Out since 1/1/P2YEAR

<table>
<thead>
<tr>
<th>1 Mover Out (CYFUHU=MO)</th>
<th>2+ Movers Out (CYFUHU=MO)</th>
<th>No Movers Out</th>
</tr>
</thead>
<tbody>
<tr>
<td>PYFUHU=FU, INST &amp; FS=Yes</td>
<td>None w/PYFUHU=FU, INST &amp; FS=Yes</td>
<td>At Least 1 w/PYFUHU=FU, INST &amp; FS=Yes</td>
</tr>
<tr>
<td>(Assign AQSN to MOHHGRPI_WEB)</td>
<td>MOHHGRP Not Valid</td>
<td>MOHHGRP Not Valid</td>
</tr>
</tbody>
</table>

GO TO SPLITOFFR RULE

MOHHINTRO1. Based on the information you provided, the following people are no longer living with your family. Are [3+ MO: any of] these people NOW living together?

Family member | Age | AQS list of Movers Out w/CYFUHU=MO & PYFUHU=FU, INST

1. Yes, [3+ MO: some or all of] these people are living together 5. No, [none of] these people are [not] living together

CHECK for NA: In order for the interview to continue, it is important to know this information. If you need assistance or prefer to continue the interview with an interviewer, please contact us at uofmsurvey@umich.edu or 1-866-796-5166.

MOHHGRP1 RULE: Number of Movers-Out Selected at MOHHINTRO1

2 Movers Out → (Assign AQSNs to MOHHGRPI_WEB) 3+ Movers Out

GO TO SPLITOFFR RULE

MOHHGRPI_WEB. Please tell us which of these people [CYNAMF] [CYNAMM] [CYNAML] is now living with. Please select all that apply.

You’ll be able to select any remaining people into another group later.

Family member | Age | AQS list of Movers Out, except 1st MO in question

1–24. [CYNAMF] [CYNAMM] [CYNAML] | [AGE] 95. None of these people

CHECK for NA: In order for the interview to continue, it is important to know this information. If you need assistance or prefer to continue the interview with an interviewer, please contact us at uofmsurvey@umich.edu or 1-866-796-5166.

MOHHINTRO2 RULE: Number of Remaining Movers-Out

None → GO TO SPLITOFFR RULE 1 MO Remains → (Assign AQSN to MOHHGRP2_WEB) 2+ MO Remains

GO TO SPLITOFFR RULE
MOHHINTRO[2..8]. Are [3+ MO: any of] these remaining people NOW living together?

<table>
<thead>
<tr>
<th>Family member</th>
<th>Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>[CYNAMF] [CYNAMM] [CYNAML]</td>
<td>AGE</td>
</tr>
</tbody>
</table>

**1. Yes, [3+ MO: some or all of] these people are living together**

**5. No, [none of] these people are [not] living together**

**CHECK for NA:** In order for the interview to continue, it is important to know this information.

If you need assistance or prefer to continue the interview with an interviewer, please contact us at uofmsurvey@umich.edu or 1-866-796-5166.

**MOHHGRP[2..8] RULE:** Number of Movers-Out Selected at MOHHINTRO[2..8]

- 2 Movers Out → (Assign AQSNs to same MOHHGRP[2..8]_WEB) GO TO SPLITOFFR RULE
- 3+ Movers Out → (Assign AQSNs to separate MOHHGRP[2..8]_WEB)

**MOHHGRP[2..8]_WEB.** Please tell us which of these people [CYNAMF] [CYNAMM] [CYNAML] is now living with.

Please select all that apply.

You’ll be able to select any remaining people into another group later.

<table>
<thead>
<tr>
<th>Family member</th>
<th>Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>1–24. [CYNAMF] [CYNAMM] [CYNAML]</td>
<td>AGE</td>
</tr>
</tbody>
</table>

**AQSN list of Movers Out, except 1st MO in question**

(Assign AQSNs to same MOHHGRP[2..8]_WEB & COVERSCREEN.MOHHGRP[2..8]=MOHHGRP[2..8]_WEB)

95. None of these people

**MOHHINTRO END RULE:** Number of Remaining Movers-Out

- None → (Assign AQSN to MOHHGRP[3..8]_WEB) GO TO SPLITOFFR RULE
- 1 MO Remains → (Assign AQSN to MOHHGRP[3..8]_WEB) GO TO SPLITOFFR RULE
- 2+ MO Remains → REPEAT MOHHINTRO[3..8] until all Movers Out are assigned to a MOHHGRP[].WEB

**Respondent**

**SPLITOFFR RULE:** FS Status and Age of Movers-Out in MOHHGRP

<table>
<thead>
<tr>
<th>1 Mover Out</th>
<th>2+ Movers Out</th>
</tr>
</thead>
<tbody>
<tr>
<td>FS &lt;&gt; Yes</td>
<td>All FS &lt;&gt; Yes</td>
</tr>
<tr>
<td>MOHHGRP Not Valid</td>
<td>At Least One Mover Out is FS=Yes</td>
</tr>
</tbody>
</table>

**MOHHGRP Not Valid**

(Assign AQSN to SPLITOFFR[]WEB)

None Age 18+ One Age 18+ 2+ Age 18+

(Assign Oldest AQSN to SPLITOFFR[]WEB)

GO TO SPLITOFFR END RULE
SPLITOFFR[1..8]WEB, One or more of the people you reported as moving out and now living together may also be eligible for our study:

<table>
<thead>
<tr>
<th>Family member</th>
<th>Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>[CYNAMF] [CYNAMM] [CYNAML] [AGE]</td>
<td>AQS list of Movers Out in MOHHGRP</td>
</tr>
</tbody>
</table>

Of the adults in this group, who would be the best person for us to get in touch with?

<table>
<thead>
<tr>
<th>Family member</th>
<th>Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>1–24. [CYNAMF] [CYNAMM] [CYNAML] [AGE]</td>
<td>NA</td>
</tr>
</tbody>
</table>

AQS list of Age 18+ Movers Out in MOHHGRP

(Assign Oldest AQS to SPLITOFFR[1..8]WEB)

SPLITOFFR END RULE: Whether There are More Mover-Out Groups

More Mover Out Groups → RETURN TO SPLITOFFR RULE

No More Mover Out Groups

Moved to FES Family (SOFESLIVE)

SOFESLIVE RULE: Whether Any FU Member in this Mover Out Group Has Moved in With an FES Family

<table>
<thead>
<tr>
<th>MOHHGRP Moved in with FES Family (At Least 1 Mover Out is FS=Yes &amp; One Mover Out is CURRENTLOCATION=3)</th>
<th>MOHHGRP Moved Out on Own (At Least 1 Mover Out is FS=Yes &amp; No Movers Out are CURRENTLOCATION=3)</th>
<th>MOHHGRP Not Valid (All Movers Out are FS&lt;&gt;Yes and/or PYFUHU=HUCS)</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Assign COVERSCREEN.SOINDICATOR[1..8]=1; SPLITOFFR[1..8]=18+: Assign COVERSSCREEN.SOMARST[1..8].LIVOWNHH =1/OwnHH. SPLITOFFR[1..8]&lt;18: Assign COVERSSCREEN.SOCHOTHFU[1..8].DIFPANFU=5/NotStudyHH) GO TO SOCHLIVE RULE</td>
<td>(Assign COVERSCREEN.SOINDICATOR[1..8]=5) GO TO MOADDRESS_WEB END RULE</td>
<td></td>
</tr>
</tbody>
</table>

CS_WEB.FAMILYCOMP.SOFESLIV[1..8][1..8]=Which mover-out group

SOFESLIVE. You reported that one or more of the people in this group has moved in with a family that does their own F.E.S. interview.

<table>
<thead>
<tr>
<th>Family member</th>
<th>Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>[CYNAMF] [CYNAMM] [CYNAML] [AGE]</td>
<td>AQS list of Movers Out in MOHHGRP</td>
</tr>
</tbody>
</table>

Which family has this person or group moved in with? Start by typing in the last name of the family - select any adult member of the family. If you don’t see any members of the family that this person or group moved in with, please select “Not in the list” and click Next to continue.

Not in the list (SP_0G) NA Selected from ID68 Database

(Assign SIDMOVE=ID68 of this FU)

(SPLITOFFR[1..8]=18+: Assign (COVERSCREEN.SOMARST[1..8]) PERSNAMF, PERSNAML & SIDMOVE from ID68 database; Assign COVERSCREEN.SOMARST[1..8].LIVOWNHH=4/StudyHH; Assign COVERSCREEN.SOINDICATOR[1..8]=2. SPLITOFFR[1..8]<18: Assign (COVERSCREEN.SOCHLIVE[1..8]) PERSNAMF, PERSNAML & COVERSCREEN.SOCHOTHFU[1..8].SIDMOVE from ID68 database; Assign COVERSCREEN.SOCHOTHFU[1..8].DIFPANFU=1/YesStudyHH; Assign COVERSCREEN.SOINDICATOR[1..8]=2.)

GO TO PERSRTSO
SOFESLIVE_SPECIFYNAMF, SOFESLIVE_SPECIFYNAML. Please tell us the name of any adult member of the family that [CYNAMF] [CYNAMM] [CYNAML] has moved in with.

If you prefer, you can enter a nickname or initials instead of a full name.

First Name String 20 (Assigned “NOT ANSWERED” if NA)
Last Name String 20 (Assigned “NOT ANSWERED” if NA)

PERSRTSO. What is [SPECIFYNAMF=RESPONSE & SPECIFYNAML=RESPONSE: [SOFESLIVE_SPECIFYNAMF] [SOFESLIVE_SPECIFYNAML]’s / ALL OTHERS: this person’s] relationship to [CYNAMF] [CYNAMM] [CYNAML]?

String 100 (Assigned “NOT ANSWERED” if NA)

SIDMOVE. Not asked. Assigned SID from ID68 database or ID68 of this FU.

End SOFESLIVE

R is Child (SOCILive_Web)

SOCLIVE RULE: Whether MO Group Moved in with FES Family; Whether Any FU Member in MO Group is 18 or Older

<table>
<thead>
<tr>
<th>No One in MOHHGRP is Age 18+</th>
<th>At Least One FU Member in MOHHGRP is Age 18+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Moved in with Non-FES Family</td>
<td>Moved in with FES Family</td>
</tr>
</tbody>
</table>

GO TO MOADDRESS_WEB RULE

CS_WEB.FAMILYCOMP.SOCLIVE_WEB[1..8] [1..8]=Which mover-out group

PERSNAMF_WEB, PERSNAML_WEB, PERSRTCH_WEB. [2+ in MOHHGRP: Everyone in this group (who moved out and are living together) is / 1 in MOHHGRP: This person (who moved out) is] less than 18 years old:

Family member Age
[CYNAMF] [CYNAMM] [CYNAML] [AGE] AQSN list of Movers Out in MOHHGRP

Could you tell us the name of an adult with whom they are now living?
If you prefer, you can enter a nickname or initials instead of a full name.

First Name String 20 (Assigned “NOT ANSWERED” if NA)
Last Name String 25 (Assigned “NOT ANSWERED” if NA)
Relationship String 100 (Assigned “NOT ANSWERED” if NA)

End SOCLIVE_WEB
### Contact Information

**MOADDRESS_WEB RULE: Whether MOHHGRP is Valid**

<table>
<thead>
<tr>
<th>MOHHGRP Not Valid</th>
<th>MOHHGRP Valid</th>
</tr>
</thead>
<tbody>
<tr>
<td>[All Movers Out are FS=&gt;Yes and/or PYFUHU=HUCS; SOINDICATOR[1..8]=5]</td>
<td>(At Least One Mover Out is FS=Yes and PYFUHU=FU, INST; SOINDICATOR[1..8]=1, 2)</td>
</tr>
</tbody>
</table>

→ GO TO MOADDRESS_WEB END RULE

---

**CS_WEB.FAMILYCOMP.MOADDRESS_WEB[1..8] [1..8] = Which mover-out group**

MOCOUNTRYCODE (MOCOUNTRYNAME), MOCOUNTY, MOADDR1, MOAPTSTE, MOADDR2, MOCITY, MOSTATECODE (MOSTATEABBREV), MOZIP, WTRCELLWEB, WTRHOMEWEB, CELLPH, CELLFOR, HOMEPH, HOMEFOR, MOEMAIL, MOEMAILADDR, MOEMAIL2, MOEMAIL2ADDR.

- **1 in MOHHGRP:** [SPLITOFFR][WEB] may also be eligible for our study. / 2+ in MOHHGRP: We mentioned earlier that [SPLITOFFR][WEB] may also be eligible for our study.) Can you give us contact information for [SPLITOFF R =AGE 18+]: [SPLITOFFR][WEB] / SPLITOFF R<AGE 18 & (SOFESLIVE_SPECIFYNAMF=RESPONSE & SOFESLIVE_SPECIFYNAML=RESPONSE, or PERSNAMF_WEB=RESPONSE & PERSNAML_WEB=RESPONSE):
- **[PERSNAMF_WEB] [PERSNAML_WEB] / SPLITOFF R<AGE 18, ALL OTHERS:** the adult with whom [SPLITOFFR][WEB] is now living?

Items in red are required.

- **Country**
  - United States includes Puerto Rico, U.S. Virgin Islands, Guam, American Samoa and the Northern Mariana Islands
  - [Select] 1 – 193 (Defaults to 185/US)

- **In Care Of**
  - "In Care Of" is used for mail to be delivered to someone at another person’s address and usually contains the name of the person to whom the address belongs.

- **Address Line 1**
  - [String 40] (Assigned "NOT ANSWERED" if NA)

- **Apartment or Suite**
  - [String 10]

- **Address Line 2**
  - "Address Line 2" is most often used for a room or floor number.

- **City**
  - [String 40] (Assigned "NOT ANSWERED" if NA)

- **State**
  - [Select] 1 – 57 (Assigned 57/FC if Country<>185)

- **[Zip / Postal] code**
  - [String 10]

- **Cell Phone Number**
  - [String 10/20] (Assign WTRCELLWEB=Yes if RESPONSE)

- **Home Phone Number**
  - [String 10/20] (Assign WTRHOMEWEB=Yes if RESPONSE)

- **Email Address**
  - [String 40] For AGE 16+ (Assign MOEMAIL=Yes if RESPONSE)

- **2nd Email Address**
  - [String 40] For AGE 16+ (Assign MOMAIL2=Yes if RESPONSE)

(Assign COVERSCREEN.MOADDRESS[1..8]=MOADDRESS_WEB[1..8].)

End MOADDRESS_WEB
R is Adult (Marital)

SOMARST_WEB RULE: Whether SPLITOFFR is Age 18 or Older

| Age 18+ | All Others | → GO TO MOADDRESS_WEB END RULE |

CS_WEB.FAMILYCOMP.SOMARSTAT_WEB[1..8] [1..8]=Which mover-out group

SOMARST_WEB. Is [SPLITOFFR][WEB]...?


↓

(Assign COVERSCREEN.SOMARSTAT[1..8].SOMARST=SOMARST_WEB)
GO TO MOADDRESS_WEB END RULE

SPOUNAMF_WEB, SPOUNAML_WEB. What is the name of [SPLITOFFR][WEB]’s spouse?
If you prefer, you can enter a nickname or initials instead of a full name.

First Name String 20  (Assigned “NOT ANSWERED” if NA)

Last Name String 25  (Assigned “NOT ANSWERED” if NA)

(Assign (COVERSCREEN.SOMARSTAT[1..8]) SOMARST=SOMARST_WEB, SPOUNAMF=SPOUNAMF_WEB & SPOUNAML=SPOUNAML_WEB.)

End SOMARST_WEB

MOADDRESS_WEB END RULE: Whether There are More MO Groups

| More Mover Out Groups | → RETURN TO SOFESLIVE RULE | No More Mover Out Groups |

Institutional Contact Information

INSTADDRESS_WEB RULE: Whether Any FU Member is Institutional

| Institutional (CYFUHU=INST) | Not Institutional (CYFUHU<>INST) |
Preloaded FU, INST (PYFUHU=1, 8-12) | Preloaded HUCS (PYFUHU=2) |

↓

GO TO RESPONDENTMIDSUMMARY
CS_WEB.FAMILYCOMP.INSTADDRESS_WEB[1..24] [1..24]=AQSIN of FU member

INSTCOUNTRYCODE (INSTCOUNTRYNAME), INSTINCO, INSTADDR1, INSTAPTSTE, INSTADDR2, INSTCITY, INSTSTATECODE (INSTSTATEABBREV), INSTZIP, WTRCELLWEB, WTRHOMEWEB, CELLPH, CELLFOR, HOMEPH, HOMEFOR, INSTEMAIL, INSTEMAILADDR, INSTEMAIL2, INSTEMAIL2ADDR.

Earlier you reported that [CYNAMF] [CYNAMM] [CYNAML] is [CYFUHU=MIL: living in a military facility / CYFUHU=EDU: living away at school / CYFUHU=HLTH: living in a health facility/ CYFUHU=OTH: living in an institutional facility]. Can you give us contact information for [CYNAMF] [CYNAMM] [CYNAML]? Items in red require a response.

Country
Select
1 – 193 (Defaults to 185/US)

United States includes Puerto Rico, U.S. Virgin Islands, Guam, American Samoa and the Northern Mariana Islands.

In Care Of
String 40

“In Care Of” is used for mail to be delivered to someone at another person’s address and usually contains the name of the person to whom the address belongs.

Address Line 1
String 40
{Assigned “NOT ANSWERED” if NA}

Apartment or Suite
String 10

Enter “Apt” or “Ste” plus numbers or letters.

Address Line 2
String 40

“Address Line 2” is most often used for a room or floor number.

City
String 40
{Assigned “NOT ANSWERED” if NA}

State
Select
1 – 57 (Assigned 57/FC if Country<>185)

[Zip / Postal] code
String 10

Cell Phone Number
String 10/20
{Assign WTRCELLWEB=Yes if RESPONSE}

Home Phone Number
String 10/20
{Assign WTRHOMEWEB=Yes if RESPONSE}

Email Address
String 40
For AGE 16+ {Assign INSTEMAIL=Yes if RESPONSE}

2nd Email Address
String 40
For AGE 16+ {Assign INSTEMAIL2=Yes if RESPONSE}

(Assign COVERSCREEN.INSTADDRESS[1..24]=INSTADDRESS_WEB[1..24])

INSTCONTACT END RULE: Whether There are More Institutionals

More Institutionals \rightarrow RETURN TO INSTADDRESS_WEB RULE \rightarrow \rightarrow No More Institutionals

End INSTADDRESS_WEB
Review 1 - New Movers In

CS_WEB.FAMILYCOMP.RESPONDENTMIDSUMMARY[1..24] [1..24]=AQSN of mover in

RESPONDENTMIDSUMMARY RULE: FU members included in Review 1

<table>
<thead>
<tr>
<th>CYFUHU</th>
<th>PYFUHU</th>
<th>CONFIRMATION</th>
<th>CURRENTLOCATION</th>
<th>NEWFAMILYROOMMATE</th>
<th>NEWFAMILYMEMBER FUHU</th>
</tr>
</thead>
<tbody>
<tr>
<td>FU</td>
<td>FU</td>
<td>Yes, NA</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>HUCS</td>
<td>HUCS</td>
<td>Yes, NA</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>HUCS</td>
<td>(new)</td>
<td>--</td>
<td>3, 7 Child or adult</td>
<td>2 HUCS</td>
<td></td>
</tr>
<tr>
<td>HU</td>
<td>(new)</td>
<td>--</td>
<td>1, 2, 3 Boarder, temp, child</td>
<td>3 HU</td>
<td></td>
</tr>
<tr>
<td>FUMI</td>
<td>INST</td>
<td>No</td>
<td>1 Live here</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>FUMI</td>
<td>(new)</td>
<td>--</td>
<td>3, 7 Child or adult</td>
<td>4 FUMI</td>
<td></td>
</tr>
<tr>
<td>MO</td>
<td>FU, INST</td>
<td>No</td>
<td>2, 3 Live elsewhere</td>
<td>--</td>
<td></td>
</tr>
<tr>
<td>MO</td>
<td>HUCS</td>
<td>No</td>
<td>4, 5, 6, 7, 8 Inst</td>
<td>--</td>
<td></td>
</tr>
<tr>
<td>DIED</td>
<td>FU, INST</td>
<td>No</td>
<td>9 Died</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>DIED</td>
<td>INST</td>
<td>Yes, NA</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>JAIL</td>
<td>FU, INST</td>
<td>No</td>
<td>7 Jail</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>JAIL</td>
<td>INST</td>
<td>Yes, NA</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>MIL</td>
<td>FU, INST</td>
<td>No</td>
<td>4 Military</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>MIL</td>
<td>INST</td>
<td>Yes, NA</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>EDU</td>
<td>FU, INST</td>
<td>No</td>
<td>5 School</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>EDU</td>
<td>INST</td>
<td>Yes, NA</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>HLTH</td>
<td>FU, INST</td>
<td>No</td>
<td>6 Health</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>HLTH</td>
<td>INST</td>
<td>Yes, NA</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>OTH</td>
<td>FU, INST</td>
<td>No</td>
<td>8 Other</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>OTH</td>
<td>INST</td>
<td>Yes, NA</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
</tbody>
</table>

RESPONDENTMIDSUMMARY, Based on your information, here is the list of your family members and others living with you:

<table>
<thead>
<tr>
<th>Family member</th>
<th>Age</th>
<th>Current family status</th>
</tr>
</thead>
<tbody>
<tr>
<td>[PRELOADED: [CYNAMF] [CYNAMM] [CYNAML]] / NEW: [FULLNAME_NAMF] [FULLNAME_NAMM] [FULLNAME_NAML]</td>
<td>[AGE / --]</td>
<td>[Living here / Living here but does their own F.E.S interview / Roommate or boarder / Temporarily living here] / [Moved back in / Moved in / Moved in (newborn or child)] / [Moved out / Passed away / Incarcerated / Living in a military facility / away at school / in a health facility / in an institutional facility]</td>
</tr>
</tbody>
</table>

Is there anyone else living with you NOW who is not listed above, including any newborn children?

1. Yes → GO TO NEWFAMILY MEMBERLOOKUP
5. No NA → SIGNAL: Please tell us whether or not a new family member needs to be added. (Assigned 8/DK if SIGNAL suppressed & RESPONDENTMIDSUMMARY=NA.)

GO TO NEWBORN RULE

1st ITERATION: If you see any errors with the “Current family status” of any family member, please use the "Previous" button to go back and make corrections. / ALL OTHERS: If you see any errors with someone’s name or age, you will have a chance to make corrections later.

End RESPONDENTMIDSUMMARY
NEWFAMILYMEMBER_AQSN. AQSN of mover-in. Assigned.

NEWFAMILYMEMBER_FUHU. Assigned FU status of mover-in.

2. HUCS NewFamilyRoommateBoarder=4 (Assign CYFUHU=HUCS & SIDHUCS[]:HUCSFUHU=HUCS)

3. HU NewFamilyRoommateBoarder=1, 2 (Assign CYFUHU=HU & HUNOTFU[], HUREASON=3, 2)

4. FUMI NewFamilyRoommateBoarder=3, 7 (Assign CYFUHU=FUMI)

NEWFAMILYMEMBERLOOKUP. What is the name of the [first / next] new family member?
As you start typing the name, a list of possible matches will be presented. If you don’t see the name of this new family member, please select “Not in the list” and click “Next” to continue.

O Not in the list (SP_0G) NA Selected from ID68 Database

RETURN TO RESPONDENTMIDSUMMARY

FULLNAME_NAMF, FULLNAME_NAMM, FULLNAME_NAML. What is the name of the [first / next] new family member?
If you prefer, you can enter a nickname or initials instead of a full name. This will be used during the interview when we ask about this family member.

First Name String 20 (Assigned “(Mr. / Ms.)” if NA & FULLNAME_NAML=Response; Assigned “New Family Member [2-24]” if NA & FULLNAME_NAML=NA)

Middle Name String 20

Last Name String 20 (Assigned “(LAST NAME UNKNOWN)” if NA & FULLNAME_NAMF=Response; Assigned “(NAME UNKNOWN)” if NA & FULLNAME_NAMF=NA)

SIGNAL for FULLNAME_NAMF & FULLNAME_NAML=NA: We will refer to this person as “New Family Member [2-24]”.
(Assign NEWFAMILYFULLNAME=FULLNAME_NAMF + FULLNAME_NAMM + FULLNAME_NAML, and assign (COVERSCREEN.CYPERSINFO.CYPINFO[1..24]) CYNAMF, CYNAMM, CYNAML=FULLNAME_NAMF, FULLNAME_NAMM, FULLNAME_NAML.)
New Family Member (Roommate/Boarder)

1. A roommate or a boarder who is NOT RELATED to you or any member of your family.
2. Temporarily living with your family for less than three months (this person could be an adult or a child, and may or may not be related to you).
3. A child younger than age 18 who is RELATED to YOU OR A MEMBER OF YOUR FAMILY (including your or a family member’s spouse or romantic partner). For example, a newborn, stepchild, adopted child, foster child, grandchild, or great-grandchild.
4. Member of another FES family NOT DISPLAYED

Newborn

Whether Any New FU is a Newborn

Newborn (NEWFAMILYROOMMATEBOARDER=3) No Newborns → GO TO CONFIRMUPDATE RULE
NEWBORN_PARENTS. Who are [FULLNAME_NAMF] [FULLNAME_NAML]'s biological or adoptive parents?
Please select up to 2 people.

<table>
<thead>
<tr>
<th>Family member</th>
<th>Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>1–24. [PRELOADED: [CYNAMF] [CYNAMM] [CYNAML] / NEW: [FULLNAME_NAMF] [FULLNAME_NAMM] [FULLNAME_NAML]</td>
<td>Age</td>
</tr>
</tbody>
</table>

AQN list of preloaded FU members (CYFUHU=FU, HUCS, INST) & new movers-in (CYFUHU=HUCS, HU, FUMI) Age 15+

97. Other - Please specify one or both parents: (NEWBORN_PARENTSSPEC (String 100))

SIGNAL for NA: Please tell us who this child’s parents are. (Assigned 98/DK if SIGNAL suppressed & NEWBORN_PARENTS=NA)

NEWBORN END RULE: Whether There are More Newborns

More Newborns → RETURN TO NEWBORN_PARENTS  No More Newborns

End NEWBORNS

Review 2 - Confirm & Update FU Members

REVIEW2 RULE: FU members included in Review 2

<table>
<thead>
<tr>
<th>CYFUHU</th>
<th>PYFUHU</th>
<th>CONFIRMATION</th>
<th>CURRENTLOCATION</th>
<th>NEWFAMILYROOMMATE BOARDER</th>
<th>NEWFAMILYMEMBER_FUHU or NEWBORN_FU</th>
</tr>
</thead>
<tbody>
<tr>
<td>FU</td>
<td>FU</td>
<td>Yes, NA</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>FUMI</td>
<td>INST</td>
<td>No</td>
<td>1 Live here</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>(new)</td>
<td>--</td>
<td>--</td>
<td>3, 7 Child or adult</td>
<td>4 FUMI</td>
<td></td>
</tr>
<tr>
<td>JAIL</td>
<td>FU, INST</td>
<td>No</td>
<td>7 Jail</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>JAIL</td>
<td>INST</td>
<td>Yes, NA</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>MIL</td>
<td>FU, INST</td>
<td>No</td>
<td>4 Military</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>MIL</td>
<td>INST</td>
<td>Yes, NA</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>MIL</td>
<td>INST</td>
<td>Yes, NA</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>EDU</td>
<td>FU, INST</td>
<td>No</td>
<td>5 School</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>EDU</td>
<td>INST</td>
<td>Yes, NA</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>HLTH</td>
<td>FU, INST</td>
<td>No</td>
<td>6 Health</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>HLTH</td>
<td>INST</td>
<td>Yes, NA</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>OTH</td>
<td>FU, INST</td>
<td>No</td>
<td>8 Other</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>OTH</td>
<td>INST</td>
<td>Yes, NA</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
</tbody>
</table>

CS_WEB.FAMILYCOMP.FINALUPDATE[1..24] [1..24]=AQN of FU member

CONFIRMUPDATE RULE: Review FU Members who are FU, FUMI, INST

There are FU, FUMI, INST (At Least 1 CYFUHU=FU, FUMI, INST)  All Others (All CYFUHU=HUCS, HU, MO, DEC)

GO TO CONFIRMUPDATE END RULE
Let’s quickly review everyone living with you as a part of your family. This review will not include family members who have passed away, moved out, or do their own F.E.S. interview, or people living with your family temporarily or are a roommate or boarder.

Reviewing:

Please review the information below and update any information that is missing or incorrect. Once you’re done making changes, click “Next” to save your changes and continue.

If you prefer, you can enter a nickname or initials instead of a full name. This will be used during the interview when we ask about this family member.

First Name [PRELOADED: [CYNAMF] / NEW: [FULLNAME_NAMF]]
Middle Name [PRELOADED: [CYNAMM] / NEW: [FULLNAME_NAMM]]
Last Name [PRELOADED: [CYNAML] / NEW: [FULLNAME_NAML]]
Month Born Select 1. January – 12. December
Day Born Select 1 – 31
Year Born 1901 – [CYEAR] CHECK for AQSNSRSELECTWEB & AGEIWDATE<18: The person completing the survey must be over 18. Are you sure that is the correct birth date?
Sex Select V 1. Male 2. Female CHECK for NA: In order for the interview to continue, please select this family member’s current legal sex. If you need assistance or prefer to continue the interview with an interviewer, please contact us at uofmsurvey@umich.edu or 1-866-796-5166.
If your gender identity differs from your current legal sex please let us know by adding a comment.

CYESTAGE RULE: Whether FU Member’s Age Can Be Calculated

Age Can Be Calculated (FINALCONFIRM_YRBRN=Response) → GO TO MSTAT RULE All Others

CYESTAGE. How old is [PRELOADED: [CYNAMF] [CYNAMM] [CYNAML] / NEW: [FULLNAME_NAMF] [FULLNAME_NAMM] [FULLNAME_NAML]]?

If you do not know the exact age, please give us your best guess.

1 – 120 Age NA
0.995. Less than one year old (SP_0C)
(Assign COVERSCEEN.CYBIRTHINFO.CYBINFO[1..24].CYESTAGE=CYESTAGE)

CYESTAGE=15-120 → RETURN to FINALCONFIRM SCREEN for Marital
ALL OTHERS → GO TO MSTAT RULE

AGEGE16. Is [PRELOADED: [CYNAMF] [CYNAMM] [CYNAML] / NEW: [FULLNAME_NAMF] [FULLNAME_NAMM]
[FULLNAME_NAML]] age 16 or older?
1. Yes → RETURN to FINALCONFIRM SCREEN for Marital 5. No NA (Assigned 8/DK)

(CAssign COVERSCEEN.AGEGE16[1..24]=AGEGE16)

CS_WEB.FAMILYCOMP.FINALUPDATE[1..24].MSTAT_WEB [1..24]=AQSOf FU member

MSTAT RULE: Marital Status

FU Member is Married (FINALCONFIRM_MARITAL=Married) All Others → GO TO CONFIRMUPDATE END RULE

SPOUNAM. Who is [PRELOADED: [CYNAMF] [CYNAMM] [CYNAML]’s / NEW: [FULLNAME_NAMF] [FULLNAME_NAMM]
[FULLNAME_NAML]’s spouse?
1–24. [CYNAMF] [CYNAMM] [CYNAML] / [FULLNAME_NAMF] [FULLNAME_NAMM] [FULLNAME_NAML] (Age: [AGE–])
AQSlist of FU members age 15+ w/CYFUHU=FU, FUMI, INST

(Assign COVERSCEEN.MARRSTAT.MSTAT[1..24].SPOUNAME=[CYNAMF+CYNAML / FULLNAME_NAMF+FULLNAME_NAML].)

GO TO CONFIRMUPDATE END RULE

97. Someone else NA

↓

SPOUNAMSPECIFYNAMF, SPOUNAMSPECIFYNAML. What is the name of [PRELOADED: [CYNAMF] [CYNAMM] [CYNAML]’s / NEW: [FULLNAME_NAMF] [FULLNAME_NAMM] [FULLNAME_NAML]’s
spouse?
If you prefer, you can enter a nickname or initials instead of a full name.
First Name String 20 (Assigned “NOT ANSWERED” if NA)
Last Name String 20 (Assigned “NOT ANSWERED” if NA)

(Assign COVERSCEEN.MARRSTAT.MSTAT[1..24].SPOUNAME=SPOUNAMSPECIFYNAMF+SPOUNAMSPECIFYNAML.)

End MSTAT_WEB

CONFIRMUPDATE END RULE: Whether There are More FU Members

More FU Members → RETURN TO CONFIRMUPDATE RULE No More FU Members

CONFIRMMMSTAT RULE: Whether Reference Person or Spouse Marital Status Inconsistent with Preloaded RTH

Preloaded Reference Person + Preloaded Spouse are FU: All Others → GO TO FINALROSTERDISPLAY RULE
One or Both Not Married or Married But to Someone Else
CONFIRM_MSTAT. You reported the following marital status for [REFERENCE PERSON] and [SPOUSE]:

[REFERENCE PERSON]: [FINALCONFIRM_MARITAL] [FINALCONFIRM_MARITAL=1: to [SPOUNAM]]

[REFERENCE PERSON]: [FINALCONFIRM_MARITAL] [FINALCONFIRM_MARITAL=1: to [SPOUNAM]]

During our interview 2 years ago, they were reported as legally married to each other. Just to confirm for our records, are [REFERENCE PERSON] and [SPOUSE] legally married to each other?

1. Yes, legally married to each other

(RP & SPOUSE: Leave CYAQRTH as is (101, 102 & 201, 202), assign FINALCONFIRM_MARITAL=Married, and SPOUNAM=AQSN of each other.)

5. No, no longer (or never) legally married to each other

(RP & SPOUSE: Leave FINALCONFIRM_MARITAL as reported. SPOUSE: Assign CYAQRTH=Partner (221, 222, 921, 922).)

Review 3 - Final Review

FINALROSTERDISPLAY RULE: FU members included in Review 3

<table>
<thead>
<tr>
<th>CYFUHU</th>
<th>PYFUHU</th>
<th>CONFORMATION</th>
<th>CURRENTLOCATION</th>
<th>NEWFAMILYROOMMATE</th>
<th>NEWFAMILYMEMBER_FUHU or NEWBORN_FU</th>
</tr>
</thead>
<tbody>
<tr>
<td>FU</td>
<td>FU</td>
<td>Yes, NA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FUMI</td>
<td>INST</td>
<td>No</td>
<td>1 Living here</td>
<td></td>
<td></td>
</tr>
<tr>
<td>FUMI</td>
<td>(new)</td>
<td>--</td>
<td>3, 7 Child or adult</td>
<td></td>
<td>FUMI</td>
</tr>
<tr>
<td>JAIL</td>
<td>FU, INST</td>
<td>No</td>
<td>7 Jail</td>
<td></td>
<td></td>
</tr>
<tr>
<td>JAIL</td>
<td>INST</td>
<td>Yes, NA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MIL</td>
<td>FU, INST</td>
<td>No</td>
<td>4 Military</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MIL</td>
<td>INST</td>
<td>Yes, NA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EDU</td>
<td>FU, INST</td>
<td>No</td>
<td>5 School</td>
<td></td>
<td></td>
</tr>
<tr>
<td>EDU</td>
<td>INST</td>
<td>Yes, NA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HLTH</td>
<td>FU, INST</td>
<td>No</td>
<td>6 Health</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HLTH</td>
<td>INST</td>
<td>Yes, NA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>OTH</td>
<td>FU, INST</td>
<td>No</td>
<td>8 Other</td>
<td></td>
<td></td>
</tr>
<tr>
<td>OTH</td>
<td>INST</td>
<td>Yes, NA</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

FINALROSTERDISPLAY. Final Review of Family

Below is a final list of your family members. [This does not include family members who have passed away, moved out, or do their own F.E.S. interview, or people living with your family temporarily or are a roommate or boarder.]

Please review the information and click on a row to make changes. Once you have finished your review and made all necessary changes, please click “Finish” to continue.

Once you click “Finish” you will be unable to make further changes.

Family member Age Marital status Current family status

[PRELOADED: [CYNAMF] [CYNAMM]] [AGE / CYESTAGE / Less than 1 / Less than 16 / 16 or older / Incomplete] [MARITAL / Doesn’t apply / Incomplete] [Living here / [Moved back in / Moved in / Moved in (newborn)] / Incarcerated / Living in a military facility / away at school / in a health facility / in an institutional facility]

Finish

End FINALUPDATE

End FAMILYCOMP
### POST FAMILY COMP RULE: Whether Final Family Listing is Incomplete/Suspend WEB Coverscreen

<table>
<thead>
<tr>
<th>1. Preloaded RP has DIED</th>
<th>FlagForStaffReview</th>
<th>Result</th>
<th>All Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. No other preloaded FS=Yes (FS=Yes &amp; PYFUHU=1, 8-12) (RP is FS=Yes)</td>
<td>1</td>
<td>8011</td>
<td>interim</td>
</tr>
<tr>
<td>B. All preloaded FS=Yes have DIED (FS=Yes &amp; PYFUHU=1, 8-12 &amp; CYFUHU=7) (RP is FS=Yes/No)</td>
<td>1</td>
<td>8011</td>
<td>interim</td>
</tr>
<tr>
<td>C. All preloaded FS=Yes are MO (FS=Yes &amp; PYFUHU=1, 8-12 &amp; CYFUHU=6) (RP is FS=Yes/No)</td>
<td>2</td>
<td>interim</td>
<td></td>
</tr>
<tr>
<td>D. All preloaded FS=Yes are mix of MO/DIED (FS=Yes &amp; PYFUHU=1, 8-12 &amp; CYFUHU=6, 7) (RP is FS=Yes/No)</td>
<td>3</td>
<td>interim</td>
<td></td>
</tr>
<tr>
<td>E. There are preloaded FS=Yes who are FU/FUMI but all are age &lt;18 (FS=Yes &amp; PYFUHU=1, 8-12 &amp; CYFUHU=1, 4 &amp; AGEIWDATE&lt;18) &amp; no preloaded SP/BF/GF or preloaded SP/BF/GF is now INST, MO, DIED (RP is FS=Yes/No)</td>
<td>4</td>
<td>interim</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2. Preloaded RP was FU &amp; is now INST or MO</th>
<th>FlagForStaffReview</th>
<th>Result</th>
<th>All Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. No other preloaded FS=Yes (FS=Yes &amp; PYFUHU=1, 8-12) (RP is FS=Yes)</td>
<td>5</td>
<td>interim</td>
<td>interim</td>
</tr>
<tr>
<td>B. All preloaded FS=Yes are mix of MO/DIED (FS=Yes &amp; PYFUHU=1, 8-12 &amp; CYFUHU=6, 7) (RP is FS=Yes, No)</td>
<td>6</td>
<td>interim</td>
<td>interim</td>
</tr>
<tr>
<td>C. All preloaded FS=Yes are INST (FS=Yes &amp; PYFUHU=1, 8-12 &amp; CYFUHU=8-12) &amp; no preloaded SP/BF/GF or preloaded SP/BF/GF is now MO, DIED &amp; no other FUMI adults (RP is FS=Yes/No)</td>
<td>4</td>
<td>interim</td>
<td>interim</td>
</tr>
<tr>
<td>D. There are preloaded FS=Yes who are FU/FUMI but all are age &lt;18 (FS=Yes &amp; PYFUHU=1, 8-12 &amp; CYFUHU=1, 4 &amp; AGEIWDATE&lt;18) &amp; no preloaded SP/BF/GF or preloaded SP/BF/GF is now INST, MO, DIED (RP is FS=Yes/No)</td>
<td>4</td>
<td>interim</td>
<td>interim</td>
</tr>
<tr>
<td>E. All preloaded FS=Yes have DIED (FS=Yes &amp; PYFUHU=1, 8-12 &amp; CYFUHU=7) (RP is FS=No)</td>
<td>1</td>
<td>8011</td>
<td>interim</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>3. Preloaded RP is FU &amp; FS=No</th>
<th>FlagForStaffReview</th>
<th>Result</th>
<th>All Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. All preloaded FS=Yes have DIED (FS=Yes &amp; PYFUHU=1, 8-12 &amp; CYFUHU=7)</td>
<td>1</td>
<td>8011</td>
<td>interim</td>
</tr>
<tr>
<td>B. All preloaded FS=Yes are MO (FS=Yes &amp; PYFUHU=1, 8-12 &amp; CYFUHU=6)</td>
<td>2</td>
<td>interim</td>
<td>interim</td>
</tr>
<tr>
<td>C. All preloaded FS=Yes are mix of MO/DIED (FS=Yes &amp; PYFUHU=1, 8-12 &amp; CYFUHU=6, 7)</td>
<td>3</td>
<td>interim</td>
<td>interim</td>
</tr>
</tbody>
</table>

### GO TO END PAGE & SUSPEND IW
(Thank you. An interviewer will be in contact with you soon. If you have any questions, please contact us at uofmsurvey@umich.edu or 1-866-796-5166.)

### Relationship to Reference Person

#### CS_WEB.POSTFAMILYCOMP

### MISSING NAMES Rule. Whether Any New Family Members with Missing Names

<table>
<thead>
<tr>
<th>First Name or Last Name is Known</th>
<th>All Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>(FULLNAME_NAMF=Response or FULLNAME_NAML=Response)</td>
<td>(FULLNAME_NAMF=NA &amp; FULLNAME_NAML=NA)</td>
</tr>
<tr>
<td>(FULLNAME_NAMF=Response &amp; FULLNAME_NAML=Response: Assign CYNAMF, CYNAMM, CYNAML=FULLNAME_NAMF / NAMM / NAML. FULLNAME_NAMF=NA &amp; FULLNAME_NAML=Response: Assign CYNAMF=(Mr. / Ms.) &amp; CYNAML=FULLNAME_NAML. FULLNAME_NAMF=Response &amp; FULLNAME_NAML=NA: Assign CYNAMF=FULLNAME_NAMF &amp; CYNAML=(LAST NAME UNKNOWN).)</td>
<td>(Assign CYNAMF=[Male / Female],[Age: [AGEIWDATE] / [CYESTAGE] / &lt;1 / &gt;15 / &lt;16 / UNKNOWN] &amp; CYNAML=(NAME UNKNOWN).)</td>
</tr>
</tbody>
</table>

GO TO SELECTNEWRP RULE
MISSINGNAMESUMMARY. Based on the information you provided, we will refer to these new family members as follows:

NEW FAMILY MEMBER [1-24] (NAME UNKNOWN) will now be referred to as [Male / Female], Age: [AGE/DATE] / [CYESTAGE] / <1 / >15 / <16 / UNKNOWN] (NAME UNKNOWN)

List of new family members with missing names
Please click “Next” to continue.

Next

SELECTNEWRP RULE: Whether a New Reference Person Needs to be Selected

<table>
<thead>
<tr>
<th>New RP Needs to be Selected</th>
<th>Preloaded RP is Current RP or New RP Has Been Assigned</th>
</tr>
</thead>
<tbody>
<tr>
<td>a) Preloaded RP has DIED, and there is no preloaded SP/BF/GF, or preloaded SP/BF/GF is now INST, MO or DIED, and one or more preloaded FS=Yes persons are FU age 18+, or there is a FUMI age 18+, but more than one is male or none are males (scenario 37.2)</td>
<td></td>
</tr>
<tr>
<td>b) Preloaded RP was FU and is now INST or MO, and there is no preloaded SP/BF/GF, or preloaded SP/BF/GF is now INST, MO or DIED, and all other preloaded FS=Yes persons are INST (scenario 39A.3)</td>
<td></td>
</tr>
<tr>
<td>c) Preloaded RP was FU and is now INST or MO, and there is no preloaded SP/BF/GF, or preloaded SP/BF/GF is now INST, MO or DIED, and one or more preloaded FS=Yes persons are FU age 18+, or there is a FUMI age 18+, but more than one is male or none are males (scenario 43.2)</td>
<td></td>
</tr>
</tbody>
</table>

SELECTNEWRP. Who is primarily financially responsible for supporting your family?
If 2 or more people are equally financially responsible, please choose just one for the purposes of this interview. Please verify your response; once you click Next, you will be unable to make further changes.

1–24. [(CYNAMF) (CYNAMM) (CYNAML) / (FULLNAME_NAMF) (FULLNAME_NAMM) (FULLNAME_NAML)] (Age: [AGE/-])

AQSNAV: list of FU members Age 18+ w/CYFUHU=FU, FUMI

CHECK for NA: In order for the interview to continue, it is important for us to understand which family member is financially responsible for supporting your family. If you need assistance or prefer to continue the interview with an interviewer, please contact us at uofmsurvey@umich.edu or 1-866-796-5166.

CS_WEB.POSTFAMILYCOMP.RELUPDATE[1..24] [1..24]=AQSNAV of FU member

RELATIONSHIPUPDATE RULE: Whether FU Member’s Relationship to Reference Person Needed

<table>
<thead>
<tr>
<th>FU Member is Mover-in (CYFUHU=HUCS, FUMI &amp; PYFUHU=empty; or CYFUHU=FUMI &amp; PYFUHU=INST)</th>
<th>There is a New Reference Person (CYAQRTH=101-102, &amp; (CYFUHU=FU &amp; PYAQRTH &gt;102, or CYFUHU=FUMI))</th>
<th>Reference Person’s Marital Status Changed (CYFUHU=FU &amp; PYFUHU=FU &amp; Marital Status Changed)</th>
<th>All Others (CYFUHU=HU; or CYFUHU=INST &amp; PYFUHU=FU; or CYFUHU=MO, DIED &amp; PYFUHU=FU, HUCS, INST)</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO RELATIONSHIP END RULE</td>
<td></td>
<td>GO TO RELATIONSHIP END RULE</td>
<td></td>
</tr>
</tbody>
</table>

RELATIONSHIP. [SELECTNEWRP NOT ASKED, 1ST ITERATION: Our systems have selected [REFERENCE PERSON] as the reference person for your family. What is [PRELOADED: (CYNAMF) (CYNAMM) (CYNAML)]’s / NEW: (FULLNAME_NAMF) (FULLNAME_NAMM) (FULLNAME_NAML)’s relationship to [REFERENCE PERSON]? [NO CURRENT SPOUSE-PARTNER/BOYFRIEND/GIRLFRIEND IN FU: Please select “Spouse” only if this person is LEGALLY married to [REFERENCE PERSON].]
NO CURRENT SPOUSE-PARTNER/BOYFRIEND/GIRLFRIEND IN FU: Please select “Partner/Boyfriend/Girlfriend” if this person is in a romantic relationship with, but is NOT LEGALLY married to, [REFERENCE PERSON].]

Select V  1. Spouse (legally married) *Valid only if there is no current SP/Bf/GF in the FU
   2. Partner/Boyfriend/Girlfriend *Valid only if there is no current SP/Bf/GF in the FU
   3. Child (biological or adopted)
   4. Step-child
   5. Child (biological or adopted) of Partner
   6. Child-in-law
   7. Foster child
   8. Sibling
   9. Sibling-in-law
 10. Sibling of Partner/Boyfriend/Girlfriend
 11. Parent (biological or adoptive)
 12. Parent-in-law
 13. Parent (biological or adoptive) of Partner/Boyfriend/Girlfriend
 14. Grandchild
 15. Great-Grandchild
 16. Grandparent
 17. Grandparent of Spouse
 18. Great-Grandparent
 19. Great-Grandparent of Spouse
 20. Nephew/Niece
 21. Nephew/Niece of Spouse
 22. Uncle/Aunt
 23. Uncle/Aunt of Spouse
 24. Cousin
 25. Cousin of Spouse
 26. Child (biological or adopted) of Boyfriend/Girlfriend
 27. Boyfriend/Girlfriend *Assigned; Not displayed to R
 28. Relative
 29. Relative of Spouse
 30. Relative of Partner/Boyfriend/Girlfriend
 31. Friend/Non-Relative
 32. Reference Person *Assigned; Not displayed to R

CHECK for NA: In order for the interview to continue, it is important for us to understand the relationships between family members. If you need assistance or prefer to continue the interview with an interviewer, please contact us at uofmsurvey@umich.edu or 1-866-796-5166.

(Assign COVERSCREEN.CYPERSINFO.CYPINFO[1..24], CYAQRTH)

If PREVIOUS clicked for LOOP 1, remain on this screen, do not return to start of interview.

ONEYEAR RULE: Whether FU Member is Partner/Boyfriend/Girlfriend

Partner/Boyfriend/Girlfriend (RELATIONSHIP=2)  All Others → GO TO RELATIONSHIP END RULE

ONEYEAR: Has [PRELOADED: CYNAMF] [CYNAMM] [CYNAML] / NEW: [FULLNAME_NAMF] [FULLNAME_NAMM] [FULLNAME_NAML] lived with [REFERENCE PERSON] for one year or more?

1. Yes  (Assign CYAQRTH=221, 222)
5. No  (Assign CYAQRTH=881, 882)
NA (Assigned 8/DK)  (Assign CYAQRTH=221, 222)

RELATIONSHIP END RULE: Whether There are More FU Members

More FU Members  → RETURN TO RELATIONSHIPUPDATE RULE  No More FU Members

End RELUPDATE
Deceased Information

**CS_WEB.POSTFAMILYCOMP.DEATHINFO_WEB[1..24] [1..24]=AQN of FU member**

DECEASED RULE: Whether Any Preloaded FU Members have Died

<table>
<thead>
<tr>
<th>At Least One FU Member is Deceased (CYFUH=DIED)</th>
<th>All Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preloaded FU, INST (PYFUHU=1, 8-12)</td>
<td>Preloaded HUCS (PYFUHU=2)</td>
</tr>
</tbody>
</table>

↓

GO TO DECEASED END RULE

AQN. AQSN of FU member. Assigned.

CYMOBRN, CYDAYBRN, CYYRBRN. You indicated that [CYNAMF] [CYNAMM] [CYNAML] passed away. Please accept our condolences.

Our records indicate that [CYNAMF] was born on [CYMOBRN] [CYDAYBRN], [CYYRBRN]. If that is NOT correct, please make any corrections below.

Month  Select ▼  1. January – 12. December
Day     Select ▼  1 – 31
Year    1901 – [CYEAR]

(Assign (COVERSCREEN.CYDEATHINFO.CYDINFO[1..24]) CYMOBRN, CYDAYBRN, CYYRBRN=CYMOBRN, CYDAYBRN, CYYRBRN.)

YRBRN RULE: Whether Year Born is Not Response

| CYYRBRN = NA  | All Others | → GO TO BIRTHCOUNTRY |

CYEASTAGE. Could you tell us how old [he / she] was?

*If you do not know the exact age, please give us your best guess.*

1 – 120  Age

(Assign COVERSCREEN.CYDEATHINFO.CYDINFO[1..24].CYEASTAGE=CYEASTAGE.)

BIRTHCOUNTRY (BIRTHCOUNTRYNAME), BIRTHST (BIRTHSTABBREV). Where was [he / she] born?

Country  Select ▼  1 – 193 (Defaults to 185/US)

*United States includes Puerto Rico, U.S. Virgin Islands, Guam, American Samoa and the Northern Mariana Islands*

State  Select ▼  1 – 57 (Assigned 57/FC if Country<>185)

(Assign (COVERSCREEN.CYDEATHINFO.CYDINFO[1..24]) BIRTHST, BIRTHSTABBREV=BIRTHST, BIRTHSTABBREV.)

CYMODTH, CYDAYDTH, CYYRDTH. When did [CYNAMF] [CYNAMM] [CYNAML] pass away?

Month  Select ▼  1. January – 12. December
Day     Select ▼  1 – 31
Year    Select ▼  [P2YEAR] – [CYEAR]

(Assign (COVERSCREEN.CYDEATHINFO.CYDINFO[1..24]) CYMODTH, CYDAYDTH, CYYRDTH=CYMODTH, CYDAYDTH, CYYRDTH.)
DEATHCOUNTRY (DEATHCTRYNAME), DEATHST (DEATHSTABBREV). Where was [he / she] residing at the time of [his / her] death?

Country

Select ▼ 1 – 193 (Defaults to 185/US)

United States includes Puerto Rico, U.S. Virgin Islands, Guam, American Samoa and the Northern Mariana Islands

State

Select ▼ 1 – 57 (Assigned 57/FC if Country<>185)

(Assign COVERSSCREEN.CYDEATHINFO.CYDINFO[1..24]) DEATHST, DEATHSTABBREV.

Deceased End RULE: Whether There are More Deceased FU Members

More Deceased → RETURN TO DECEASED RULE
No More Deceased → GO TO SECTION A

End DEATHINFO_WEB
End POSTFAMILYCOMP
End CS_WEB
Section A: Housing; Utilities; Device and Internet Use

SECTION_A

A3CKPT. CAI Checkpoint: Who is Respondent

1. R=RP, SP (RESPONDENT=1, 2, 3)  5. R=OFUM, Proxy (RESPONDENT=4, 7) → GO TO A4

A3. (CATI) 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?


(WEB) Please think about your life-as-a-whole. How satisfied are you with it?


A4. (CATI) Do you live in a one-family house, a two-family house, an apartment, a mobile home, or what?
• IF R answers “condo,” PROBE for the physical structure of the condo: We are looking for the physical structure of your condo. Is it a free standing home, attached to others, or part of a multi-unit building?

1. One-family house  2. Two-family house or duplex  3. Apartment in a multi-unit building; project
4. Mobile home or trailer  6. Row or town house  7. Other-specify (A4SPEC. Specify. (String 100))

(WEB) Do you live in a ...?
If you live in a condo, please select the physical structure of that condo (e.g., free-standing one or two family house, part of a multi-unit building, attached to others such as a row or town house).

1. One-family house  2. Two-family house or duplex  3. Apartment in a multi-unit building
4. Mobile home or trailer  6. Row or town house  7. Other - Please specify: (A4SPEC)

A5CKPT. CAI Checkpoint: Whether Reference Person or Spouse-Partner is Age 55+

1. RP or SP is Age 55+ (AGE=IWDATE=55-120)  5. All Others → GO TO A8

A6A. (CATI) Some places require at least one family member to be 55 years or older. Is the place you live like that?

1. Yes  5. No → GO TO A8

GO TO A7A RULE

(WEB) Some places require at least one family member to be 55 years or older. Is the place you live like that?

1. Yes  5. No → GO TO A8

GO TO A7A RULE

A7A RULE: Whether FU Lives In Apartment/Project or Other

Apartment/Project or Other (A4=3, 7)  All Others → GO TO A8
A7A. (CATI) Sometimes places offer services that help with daily activities, such as help with bathing or dressing, group meals, or handling medications. Does the place you live offer services like that?

1. Yes  5. No

(WEB) Sometimes places offer services that help with daily activities, such as help with bathing or dressing, group meals, or handling medications. Does the place you live offer services like that?

1. Yes  5. No

A8. (CATI) [R=RP, SP, OFUM: For these next questions, when I refer to “family”, I mean your family living there with you.]

How many rooms do you have [for your family] not counting bathrooms?

- [HU or HUCS in FU: Please do not include any rooms used only 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 – 97

CHECK: Please enter a number from 0 to 97.

A19. (CATI) Do you [or anyone else in your family living there] own the [A4=APT: apartment / A4=MOBILE: mobile home / ALL OTHERS: home], do you pay rent, or what?

- If R says “coop, cooperative”, PROBE: Are you a shareholder - do you have a purchase agreement - in the cooperative, or do you 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

GO TO A20  GO TO A31  GO TO A34

(WEB) Do you [or anyone else in your family living there] own the [A4=APT: apartment / A4=MOBILE: mobile home / ALL OTHERS: home], do you pay rent, or neither?

1. Own or buying  5. Rent  8. Neither own nor rent  NA

GO TO A20  GO TO A31  GO TO A34

Owners (A19=1)

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

$ 0 – 99,999,997 → GO TO A20A1  DK/RF → GO TO A20A

(WEB) What is the present value of your [A4=APT: apartment / A4=MOBILE: mobile home / ALL OTHERS: home] - about how much would it bring if you sold it today?

$ 0 – 99,999,997 .00 → GO TO A20A1  NA → GO TO A20AA20E_W

CHECK: Please enter a number from 0 to 99999997.
A20A. *(CATI ONLY)* Would it amount to $200,000 or more?

<table>
<thead>
<tr>
<th>1. Yes</th>
<th>5. No DK/RF → GO TO A20A1</th>
</tr>
</thead>
</table>

A20B. *(CATI ONLY)* (Would it amount to) $300,000 or more?

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

A20C. *(CATI ONLY)* (Would it amount to) $500,000 or more?

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

A20AA20E_W. *(WEB ONLY)* What is your best estimate?

<table>
<thead>
<tr>
<th>1. Less than $50,000</th>
<th>2. $50,000 to less than $100,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>3. $100,000 to less than $200,000</td>
<td>4. $200,000 to less than $300,000</td>
</tr>
<tr>
<td>5. $300,000 to less than $500,000</td>
<td>6. $500,000 or more</td>
</tr>
</tbody>
</table>

A20F RULE: Whether FU Lives In Mobile Home

<table>
<thead>
<tr>
<th>Mobile Home (A4=4)</th>
<th>All Others → GO TO A21</th>
</tr>
</thead>
</table>

A20F. *(CATI)* Do you rent the lot (where your mobile home is located)?

<table>
<thead>
<tr>
<th>1. Yes</th>
<th>5. No → GO TO A21</th>
</tr>
</thead>
</table>

A20G (WEB) Do you rent the lot where your mobile home is located?

<table>
<thead>
<tr>
<th>1. Yes</th>
<th>5. No → GO TO A21</th>
</tr>
</thead>
</table>
A20G, A20GPER. (CATI) How much do you pay to rent the lot?
- ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)

$ 1 – 99,997  → 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))

(Web) How much do you pay to rent the lot?

$ 1 – 99,997 .00 per _____

CHECK: Please enter a number from 1 to 999997.

SIGNAL: Please select a unit of time.

A20H. (CATI) Does [A20G=DK, RF, NA: the lot rent / ALL OTHERS: this amount] include water and sewer?
1. Yes 5. No  → GO TO A37A

(Web) Does [A20G=DK, RF, NA: the lot rent / ALL OTHERS: this amount] include water and sewer?
1. Yes 5. No  → GO TO A37A

A21. (CATI) About how much do you pay a year in property taxes, including city, county, and school taxes?

$ 0 – 99,997

(Web) About how much do you pay a year in property taxes, including city, county, and school taxes?

$ 0 – 99,997 .00

CHECK: Please enter a number from 0 to 9997.

A22. (CATI) About how much do you pay a year for your total yearly homeowner’s insurance premium?

$ 0 – 9,997

(Web) About how much do you pay a year for your total yearly homeowner’s insurance premium?

$ 0 – 9,997 .00

CHECK: Please enter a number from 0 to 9997.

Mortgages

SECTION_A.MGTE[1..2] [1..2]=Which mortgage

A23. (CATI) Do you have a mortgage or loan on this property?
- If R says more than one mortgage or loan: Please tell me about the one (mortgage or loan) you’ve had the longest

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

GO TO A23A

(Web) Do you have a mortgage or loan on this property?

If you have more than one mortgage or loan on this property, please tell us about the one you’ve had the longest.

1. Yes 5. No  → GO TO A37A

GO TO A23A
A23A. (CATI) [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?]

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
<th>GO TO</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Mortgage</td>
<td>2. Land contract,</td>
<td>GO TO A23B</td>
</tr>
<tr>
<td></td>
<td>loan from seller</td>
<td></td>
</tr>
<tr>
<td>3. Home equity</td>
<td>4. Home improvement</td>
<td></td>
</tr>
<tr>
<td>5. Line of credit loan</td>
<td>DK/RF</td>
<td></td>
</tr>
<tr>
<td>7. Other-specify</td>
<td>(A23ASPEC. Specify. (String 100))</td>
<td>GO TO A24</td>
</tr>
</tbody>
</table>

(WEB) What type of mortgage or loan is that?

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
<th>GO TO</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Mortgage</td>
<td>2. Land contract or</td>
<td>GO TO A23B</td>
</tr>
<tr>
<td></td>
<td>loan from seller</td>
<td></td>
</tr>
<tr>
<td>3. Home equity</td>
<td>4. Home improvement</td>
<td></td>
</tr>
<tr>
<td>5. Line of credit loan</td>
<td>NA</td>
<td></td>
</tr>
<tr>
<td>7. Other - Please specify:</td>
<td>(A23ASPEC)</td>
<td>GO TO A24</td>
</tr>
</tbody>
</table>

A23B. (CATI) Is that the original loan and terms, or have you refinanced?

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Original</td>
<td>2. Refinanced</td>
</tr>
</tbody>
</table>

(WEB) Is that the original loan and terms, or have you refinanced?

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Original</td>
<td>2. Refinanced</td>
</tr>
</tbody>
</table>

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

$0 – 9,999,997

(WEB) About how much is the remaining principal on this loan?

$0 – 9,999,997.00

CHECK: Please enter a number from 0 to 9999997.

A25. (CATI) How much are your monthly loan payments?

$0 – 99,997

(WEB) How much are your monthly loan payments?

$0 – 99,997.00

CHECK: Please enter a number from 0 to 99997.

A25A1. (CATI) Does this amount include property taxes?

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Yes</td>
<td>5. No</td>
</tr>
</tbody>
</table>

(WEB) Does this amount include property taxes?

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Yes</td>
<td>5. No</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Yes</td>
<td>5. No</td>
</tr>
</tbody>
</table>

(WEB) Does this mortgage or loan payment include insurance premiums?

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Yes</td>
<td>5. No</td>
</tr>
</tbody>
</table>

A25A3. (CATI) Is the interest rate on that mortgage or loan fixed or variable?

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Fixed</td>
<td>2. Variable</td>
</tr>
</tbody>
</table>

(WEB) Is the interest rate on that mortgage or loan fixed or variable?

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Fixed</td>
<td>2. Variable</td>
</tr>
</tbody>
</table>
A25A4. (CATI ONLY) What is the current interest rate on that loan?
- ENTER the whole number portion and then ENTER the fraction portion at the next screen.

\[ 0 \text{ – 65 } \text{ DK/RF} \rightarrow \text{GO TO A26} \]
\[ \downarrow \text{SIGNAL for A25A4=25-65: You have entered interest rate=[A25A4]}. \%	ext{. If this is not correct, go back to A25A4 and enter correct amount. If this is correct, click [SUPPRESS] to continue.} \]

A25B. (CATI ONLY) (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

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>8. Other-specify (A25BSPEC. Specify. (String 100))</td>
<td></td>
</tr>
</tbody>
</table>

GO TO A26

A25A4A25B_W. (WEB ONLY) What is the current interest rate on that loan?

<table>
<thead>
<tr>
<th>0.000 – 97.000</th>
<th>Conversion Table</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/8 = .125</td>
<td>1/4 = .25</td>
</tr>
<tr>
<td>3/8 = .375</td>
<td>1/2 = .5</td>
</tr>
<tr>
<td>5/8 = .625</td>
<td>3/4 = .75</td>
</tr>
<tr>
<td>7/8 = .875</td>
<td></td>
</tr>
</tbody>
</table>

\[ \text{SIGNAL for A25A4A25B_W>24.000%: The interest rate entered is [A25A4A25B_W]}%. \text{ Please verify and make any corrections needed before moving on.} \]

A26. (CATI) What year did you [A23B=REFINANCED: (last) refinance / ALL OTHERS: obtain] that loan?

| 1901 – [CYEAR] |

(WEBSITE) What year did you [A23B=REFINANCED: (last) refinance / ALL OTHERS: obtain] that loan?

| 1901 – [CYEAR] | Year |

A27. (CATI) About how many more years will you have to pay on it?

| 1 – 97 |

(WEBSITE) About how many MORE years will you have to pay on it?

\[ \text{For less than one year, please enter “1.”} \]

| 1 – 97 | Number of years |

\[ \text{CHECK: Please enter a number from 1 to 97.} \]
Foreclosure

A27A. (CATI)  
1ST MTGE: Some people have had difficulties recently making their mortgage or loan payments. Are you [or anyone in your family living there], currently behind on your [A23A=MTGE: mortgage / ALL OTHERS: loan] payments?  
2nd MTGE: (Some people have had difficulties recently making their mortgage or loan payments.) Are you [or anyone in your family living there], currently behind on your [A23A=MTGE: mortgage / ALL OTHERS: loan] payments (for this [A23A=MTGE: mortgage / ALL OTHERS: loan])?

[ ] 1. Yes  [ ] 5. No → GO TO A27F

GO TO A27B

A27B. (CATI) How many months are you behind?

1 – 97

(WEB) How many months are you behind?

1 – 97  Number of months

CHECK: Please enter a number from 1 to 97.

A27C. (CATI) Has your bank or lender started the process of foreclosing on your home?

[ ] 1. Yes  [ ] 5. No → GO TO A27F

GO TO A27D

(WEB) Has your bank or lender started the process of foreclosing on your home?

[ ] 1. Yes  [ ] 5. No → GO TO A27F

GO TO A27D
A27D, A27E. (CATI) 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?

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

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

[A27D], _____

Select [ ]

IWTYPE=REINT: [P2YEAR]–[CYEAR]; IWTYPE=RECON: [P4YEAR]–[CYEAR]; IWTYPE=SO, RECSO: 2001–[CYEAR]

(WEB) In what month and year did the foreclosure start?
If you do not know the month, please select the season.

Select [ ]

Month or Season

Select [ ] Year

IWTYPE=REINT: [P2YEAR]–[CYEAR]; IWTYPE=RECON: [P4YEAR]–[CYEAR]; IWTYPE=SO, RECSO: 2001–[CYEAR]

CHECK: Please enter a date before today.

A27F. (CATI) Have you worked with your bank or lender to restructure or modify your [A23A=MTGE: mortgage / ALL OTHERS: loan] [A27A=YES: because of missed payments]?

1. Yes 5. No

(WEB) Have you worked with your bank or lender to restructure or modify your [A23A=MTGE: mortgage / ALL OTHERS: loan] [A27A=YES: because of missed payments]?

1. Yes 5. No

A27G. (CATI) How likely is it that you [A27A=YES: will continue to be behind / ALL OTHERS: will fall behind] on your [A23A=MTGE: 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

(WEB) How likely is it that you will [A27A=YES: continue to be behind / ALL OTHERS: fall behind] on your [A23A=MTGE: mortgage / ALL OTHERS: loan] payments in the next 12 months?

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

A28. (CATI) Do you also have a second mortgage on this property?

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

Then GO TO A37A

(WEB) Do you 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 MGTE
Renters (A19=5)

A31, A31PER. (CATI ONLY) About how much rent do you pay a month [A4=MOBILE], including rent for the lot?

- [HU or HUCS in FU: IF FU lives with non-FU members, PROBE: Is that only for your (FU’s) share of the rent?]
- [A4=MOBILE: 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 A31A RULE

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])

(WEB) About how much rent do you pay a month [A4=MOBILE], including rent for the lot?

[A4=MOBILE: if you own the lot, please do not include the value of the lot.]

[HU or HUCS in FU: Please do not include amounts paid by [HU & HUCS: roommates, people living with you temporarily, or family living with you who do their own F.E.S. interview / HU only: roommates or people living with you temporarily / HUCS only: family living with you who do their own F.E.S. interview].]

$ 1 – 99,997.00 per

CHECK: Please enter a number from 1 to 99997.

SIGNAL: Please select a unit of time.

A31A RULE: Whether FU Lives In Mobile Home

Mobile Home (A4=4) All Others → GO TO A31B

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

1. Yes 5. No

(WEB) Does [A31=DK, RF, NA: the rent / ALL OTHERS: this amount] include water and sewer?

1. Yes 5. No

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

1. Yes 5. No

(WEB) Is this [A4=APT: apartment / A4=MOBILE: mobile home / ALL OTHERS: home] rented fully furnished?

1. Yes 5. No

A31C. (CATI) Is heating included in your monthly rent?

1. Yes 5. No

(WEB) Is heating included in your rent?

1. Yes 5. No
A32. (CATI) Is this [A4=APT: apartment / A4=MOBILE: mobile home / ALL OTHERS: home] 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

GO TO A33

(WEB) Is this [A4=APT: apartment / A4=MOBILE: mobile home / ALL OTHERS: home] 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

GO TO A33

A33. (CATI) Does a federal, state, or local government housing program pay part of your rent?

($) [A31] per [A31PER])

1. Yes  5. No

GO TO A37A

(WEB) Does a federal, state, or local government housing program pay part of your rent?

1. Yes  5. No

GO TO A37A

Neither Owns nor Rents (A19=8)

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

String 400

(WEB) Please tell us a little more about your housing situation.

String 400

A35, A35PER. (CATI) How much would it rent for if it were rented?

• [HU or HUCS in FU: IF FU lives with non-FU members, PROBE: Would that be only for your (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

↓

The rent amount entered is: [A35] per ____

• SELECT the unit of time below

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

7. Other-specify (A35PERSPEC. Specify. (String 100))

(WEB) How much would it rent for if it were rented?

[HU or HUCS in FU: Please do not include amounts paid by [HU & HUCS: roommates, people living with you temporarily, or family living with you who do their own F.E.S. interview / HU only: roommates or people living with you temporarily / HUCS only: family living with you who do their own F.E.S. interview].]

$1 – 9,997 .00 per

CHECK: Please enter a number from 1 to 9997.

7. Other - Please specify: (A35PERSPEC)

SIGNAL: Please select a unit of time.
A36. (CATI) Is this [A4=APT: apartment / A4=MOBILE: mobile home / ALL OTHERS: home] 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
   GO TO A37

(WEB) Is this [A4=APT: apartment / A4=MOBILE: mobile home / ALL OTHERS: home] 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
   GO TO A37

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

(WEB) Are you paying no rent because a Federal, State, or local government housing program is paying all of it?
   1. Yes 5. No

Past Foreclosure

SECTION_A.A37FOR[1]

A37A. (CATI) [A27C=YES: [IWTYPE=REINT: Other than the foreclosure experience we just talked about, since our last interview in [P2YEAR] [PYIWDATE=RESPONSE: ([PYIWDATE])], have you [or anyone in your family living there] had a home on which a foreclosure was started? / IWTYPE=RECON: Other than the foreclosure experience we just talked about, since our last interview in [P4YEAR] [PYIWDATE=RESPONSE: ([PYIWDATE])], have you [or anyone in your family living there] had a home on which a foreclosure was started? / IWTYPE=SO, RECSO: Other than the foreclosure experience we just talked about, since January 1, 2001, have you [or anyone in your family living there] had a home on which a foreclosure was started?]
   / A27C<>YES: [IWTYPE=REINT: Since our last interview in [P2YEAR] [[PYIWDATE]], have you [or anyone in your family living there] had a home on which a foreclosure was started? / IWTYPE=RECON: Since our last interview in [P4YEAR] [[PYIWDATE]], have you [or anyone in your family living there] had a home on which a foreclosure was started? / IWTYPE=SO, RECSO: Since January 1, 2001, have you [or anyone in your family living there] had a home on which a foreclosure was started?]]
   1. Yes 5. No → GO TO A42_1
   GO TO A37B

(WEB) [A27C=YES: [IWTYPE=REINT: Other than the foreclosure experience you just reported, since our last interview in [P2YEAR] [PYIWDATE=RESPONSE: ([PYIWDATE])], have you [or anyone in your family living there] had a home on which a foreclosure was started? / IWTYPE=RECON: Other than the foreclosure experience you just reported, since our last interview in [P4YEAR] [PYIWDATE=RESPONSE: ([PYIWDATE])], have you [or anyone in your family living there] had a home on which a foreclosure was started? / IWTYPE=SO, RECSO: Other than the foreclosure experience you just reported, since January 1, 2001, have you [or anyone in your family living there] had a home on which a foreclosure was started?]
   / A27C<>YES: [IWTYPE=REINT: Since our last interview in [P2YEAR] [[PYIWDATE]], have you [or anyone in your family living there] had a home on which a foreclosure was started? / IWTYPE=RECON: Since our last interview in [P4YEAR] [[PYIWDATE]], have you [or anyone in your family living there] had a home on which a foreclosure was started? / IWTYPE=SO, RECSO: Since January 1, 2001, have you [or anyone in your family living there] had a home on which a foreclosure was started?]]
   1. Yes 5. No → GO TO A42_1
   GO TO A37B
A37B, A37C. (CATI) 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?
- If R says more than one foreclosure: Please tell us about the first of those foreclosures

Select V


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

A37D. (CATI) Was the home foreclosed upon?

- If R says more than one foreclosure: Please tell us about the first of those foreclosures

1. Yes 5. No → GO TO A37F

GO TO A37E

WEB) Was the home foreclosed upon?

1. Yes 5. No → GO TO A37F

GO TO A37E

A37E. (CATI) Did you lose your home as a result of this foreclosure?

- If R says more than one foreclosure: Please tell us about the first of those foreclosures

1. Yes 5. No

WEB) Did you lose your home as a result of this foreclosure?

1. Yes 5. No

A37F. (CATI) Was this home your main residence, investment property, a vacation home or what?

- If R says more than one foreclosure: Please tell us about the first of those foreclosures

1. Main residence  2. Investment property  3. Vacation home / condo
7. Other-specify (A37FSPEC. Specify. (String 255))

WEB) Was this home your...?

1. Main residence  2. Investment property  3. Vacation home / condo
7. Other - Please specify: (A37FSPEC)
A37G. (CATI) About how much did you still owe on your mortgage or loan when the foreclosure started?

- If R says more than one foreclosure: Please tell us about the first of those foreclosures

\[ $1 - 9,999,997 \]

(WEB) About how much did you still owe on your mortgage or loan when the foreclosure started?

\[ $1 - 9,999,997 \]

CHECK: Please enter a number from 1 to 9999997.

End A37FOR

Utilities

A42_1. (CATI) The next few questions are about utilities for your [A4=APT: apartment / A4=MOBILE: mobile home / ALL OTHERS: home]. Does your [A4=APT: apartment / A4=MOBILE: mobile home / ALL OTHERS: home] use electricity, gas or other fuel, or both?
- If needed, PROBE: This question asks about the type of utility used. Later I will ask about how much is paid for each utility.

1. Electricity only
2. Gas/other fuel only
3. Both
5. Neither (VOL) DK/RF

GO TO A42B GO TO A42A GO TO A42_2 GO TO A43CKPT GO TO A42A

(WEB) The next few questions are about utilities for your [A4=APT: apartment / A4=MOBILE: mobile home / ALL OTHERS: home]. Does your [A4=APT: apartment / A4=MOBILE: mobile home / ALL OTHERS: home] use...? This question asks about the type of utility used. Later we will ask about how much is paid for each utility.

1. Electricity only
2. Gas or other fuel only
3. Both electricity and gas/other fuel
5. Neither electricity nor gas/other fuel NA

GO TO A42BB GO TO A42A GO TO A42_2 GO TO A43CKPT

A42_2. (CATI) Are you able to separately report how much you pay for these utilities?

1. Yes
5. No \[ \rightarrow \] GO TO A42C DK/RF

GO TO A42A

(WEB) Are you able to separately report how much you pay for these utilities?

1. Yes
5. No \[ \rightarrow \] GO TO A42C NA

GO TO A42A
A42A, A42APER.  (CATI) How much do you [and your family living there] usually pay for gas or other types of fuel (for your [A4=APT: apartment / A4=MOBILE: mobile home / ALL OTHERS: home]) per month on average?

- If R says FU uses electric heating, PROBE: Please don’t include electricity costs here.
- If R says gas or other fuel is included in the rent, ENTER [0]
- [HU or HUCS 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 RULE $1 – 9,997 DK/RF → GO TO A42B RULE

The amount entered is: [A42A] per _____
- SELECT the unit of time below

5. Month 6. Year

5. Month 6. Year

A42B RULE: Whether FU Uses Gas/Other Fuel or Electricity

Unknown
(A42_1=DK, RF, NA) → GO TO A43CKPT
Both & Able to Report Separately
(A42_1=3 & A42_2=Yes, DK, RF, NA) → GO TO A43CKPT
Gas/Other Fuel Only
(A42_1=2) \[\rightarrow\] GO TO A43CKPT

A42B, A42BPER.  (CATI) (How much do you [and your family living there] usually pay...)

For electricity per month?

- [HU or HUCS in FU: Please do not include amounts paid by HU & HUCS: roommates, people living with you temporarily, or family living with you who do their own F.E.S. interview / HU only: roommates or people living with you temporarily / HUCS only: family living with you who do their own F.E.S. interview.]

$0 → GO TO A43CKPT $1 – 9,997 DK/RF → GO TO A43CKPT

The amount entered is: [A42B] per _____
- SELECT the unit of time below

5. Month 6. Year

5. Month 6. Year

GOTO A43CKPT

(WEB) How much do you [and your family living there] usually pay for gas or other types of fuels for your

[A4=APT: apartment / A4=MOBILE: mobile home / ALL OTHERS: home] per month on average? Please do not include electricity costs.

If gas or other fuel is included in the rent, please enter “0”.

[HU or HUCS in FU: Please do not include amounts paid by [HU & HUCS: roommates, people living with you temporarily, or family living with you who do their own F.E.S. interview / HU only: roommates or people living with you temporarily / HUCS only: family living with you who do their own F.E.S. interview.]

$0 – 9,997 .00 per  

CHECK: Please enter a number from 0 to 9997.

7. Other - Please specify: (A42APERSPEC)

SIGNAL: Please select a unit of time.
A42C, A42CPER. (CATI) How much do you [and your family living there] usually pay for these (electricity and gas or other types of fuel) combined?
- [HU or HUCS 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 A43CKPT  $ 1 – 9,997 DK/RF → GO TO A43CKPT

The amount entered is: [A42C] per ___
- SELECT the unit of time below
  5. Month   6. Year   7. Other-specify (A42CPERSPEC. Specify. (String 100))

(WEB) How much do you [and your family living there] usually pay for electricity and gas or other types of fuel combined per month?
- [HU or HUCS in FU: Please do not include amounts paid by [HU & HUCS: roommates, people living with you temporarily, or family living with you who do their own F.E.S. interview / HU only: roommates or people living with you temporarily / HUCS only: family living with you who do their own F.E.S. interview].]

$ 0 – 9,997 .00 per  5. Month   6. Year
CHECK: Please enter a number from 0 to 9997.
SIGNAL: Please select a unit of time.

A43CKPT. CAI Checkpoint: Whether Sewer/Water Included In Mobile Home Rent

A43, A43PER. (CATI) (How much do you [and your family living there] usually pay...) For water and sewer per month?
- [HU or HUCS 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

The amount entered is: [A43] per ___
- SELECT the unit of time below
  4. Quarter   5. Month   6. Year   7. Other-specify (A43PERSPEC. Specify. (String 100))

(WEB) How much do you [and your family living there] usually pay for water and sewer per month?
- [HU or HUCS in FU: Please do not include amounts paid by [HU & HUCS: roommates, people living with you temporarily, or family living with you who do their own F.E.S. interview / HU only: roommates or people living with you temporarily / HUCS only: family living with you who do their own F.E.S. interview].]

$ 0 – 9,997 .00 per  4. Quarter   5. Month   6. Year
CHECK: Please enter a number from 0 to 9997.
SIGNAL: Please select a unit of time.
A44, A44PER. (CATI) (How much do you [and your family living there] usually pay…)
For telephone, including cell phone, cable or satellite TV, and internet service combined, per month?
  • Includes streaming services such as Hulu and Netflix
  • [HU or HUCS 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 → GO TO A45

The amount entered is: [A44] per _____
  • SELECT the unit of time below
  5. Month    6. Year    7. Other-specify (A44PERSPEC. Specify. (String 100))

A45. (CATI) And do you have any other utility expenses?

  1. Yes      5. No → GO TO A40

GO TO A45A

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

[HU or HUCS in FU: Please do not include amounts paid by [HU & HUCS: roommates, people living with you temporarily, or family living with you who do their own F.E.S. interview / HU only: roommates or people living with you temporarily / HUCS only: family living with you who do their own F.E.S. interview].]

$ 0 – 9,997 .00 per 5. Month 6. Year

CHECK: Please enter a number from 0 to 9997.

SIGNAL: Please select a unit of time.

A45A. (CATI) What are those other utility expenses?

A45B, A45BPER. (CATI ONLY) On average, how much are these other utility expenses per month?
  • [HU or HUCS 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)

$ 1 – 997 → GO TO A40

The amount entered is: [A45B] per _____
  • SELECT the unit of time below
  5. Month    6. Year    7. Other-specify (A45BPERSPEC. Specify. (String 100))

(WEB) On average, how much are these other utility expenses per month?

[HU or HUCS in FU: Please do not include amounts paid by [HU & HUCS: roommates, people living with you temporarily, or family living with you who do their own F.E.S. interview / HU only: roommates or people living with you temporarily / HUCS only: family living with you who do their own F.E.S. interview].]

$ 1 – 997 .00 per 5. Month 6. Year

CHECK: Please enter a number from 1 to 997.

SIGNAL: Please select a unit of time.
A40. (CATI) How is your [A4=APT: apartment / A4=MOBILE: mobile home / ALL OTHERS: home] heated - with gas, electricity, oil or what?
   • ENTER all that apply
   • PROBE: Any others?


97. Other-specify (A40SPEC. Specify. (String 100))

(Web) How is your [A4=APT: apartment / A4=MOBILE: mobile home / ALL OTHERS: home] heated?
Please select all that apply.


97. Other - Please specify: (A40SPEC)

A46. (CATI) There are government programs that give money to people to help them pay for heating and cooling their homes. Did you receive help from such a program last year ([PYEAR])?

1. Yes  5. No → GO TO A57CKPT

GO TO A46A

(Web) There are government programs that give money to people to help them pay for heating and cooling their homes. Did you receive help from such a program last year ([PYEAR])?

1. Yes  5. No → GO TO A57CKPT

GO TO A46A

A46A, A46APER, A46APCT. (CATI) About how much did that amount to altogether?

• If R gives a percentage, PROBE: Could you convert that into an amount? If YES, ENTER amount; If NO, PRESS [Enter] to record percentage
• ENTER dollar amount here, then SELECT unit of time on next screen (Month, Year) OR PRESS [Enter] to enter percentage

[ENTER]  ↓  ↓

$ 1 – 9,997 DK/RF → GO TO A57CKPT

(What percent did that amount to altogether?)

• ENTER a percentage from 1.0 to 100.0
• SELECT the unit of time below

1.0 – 100.0 %

5. Month  6. Year  7. Other-specify (A46APERSPEC. Specify. (String 100))

CHECK: Please enter a percentage from 1.0 to 100.0.

(Web) About how much did that amount to altogether?
Please provide an amount or a percent.

A46A, A46APER. Default

To enter a percent (%) instead, click here.

$ 1 – 9,997 .00 per

CHECK: Please enter a number from 1 to 9997.

A46APCT. Alternate

To enter an amount ($) instead, click here.

1.0 – 100.0 %

CHECK: Please enter a percentage from 1.0 to 100.0.

A57CKPT. CAI Checkpoint: Who is Respondent

1. R=Proxy (RESPONDENT=7) → GO TO RESIDENCE SECTION  5. R=RP, SP, OFUM (RESPONDENT=1, 2, 3, 4)
Device & Internet Use

SECTION_A.A57[1..2] [1]=Reference Person, [2]=Spouse-Partner
AQSN. AQSN of Reference Person (Spouse-Partner). Assigned.

A57A. (CATI) [CYNAMF] [CYNAML], [CYAQRTH], [CYFUHU], AGE [AGEIWDATE] [(Respondent)]
[Do you / Does [REFERENCE PERSON] / Does [SPOUSE-PARTNER]] have a computer, laptop, or tablet that [you / he / she] can use at home?
- If needed: Include devices that [you / he / she] might bring home to do work related to [your / his / her] job.
- If needed: A tablet is used by touching the screen, like the Apple iPad, Samsung Galaxy Tab, or Amazon Fire.

1. Yes    5. No

GO TO A57E

(WEB) [Do you / Does [REFERENCE PERSON] / Does [SPOUSE-PARTNER]] have a computer, laptop, or tablet that [you / he / she] can use at home? Include devices that might be brought home to do work related to a job. A tablet is used by touching the screen, like the Apple iPad, Samsung Galaxy Tab, or Amazon Fire.

1. Yes    5. No

GO TO A57E

A57E. (CATI) [CYNAMF] [CYNAML], [CYAQRTH], [CYFUHU], AGE [AGEIWDATE] [(Respondent)]
[Do you / Does [REFERENCE PERSON] / Does [SPOUSE-PARTNER]] have a smartphone that [you / he / she] can use to go on the internet?

1. Yes    5. No → GO TO A57J

GO TO A57
END RULE

(WEB) [Do you / Does [REFERENCE PERSON] / Does [SPOUSE-PARTNER]] have a smartphone that [you / he / she] can use to go on the internet?

1. Yes    5. No → GO TO A57J

GO TO A57
END RULE

A57J. (CATI) [CYNAMF] [CYNAML], [CYAQRTH], [CYFUHU], AGE [AGEIWDATE] [(Respondent)]
[Do you / Does [REFERENCE PERSON] / Does [SPOUSE-PARTNER]] have a cell phone?

1. Yes    5. No

(WEB) [Do you / Does [REFERENCE PERSON] / Does [SPOUSE-PARTNER]] have a cell phone?

1. Yes    5. No

A57 END RULE: Whether Spouse-Partner in FU (CYAQRTH=201-222, CYFUHU=FU, FUMI)

Spouse-Partner → REPEAT A57A - A57J; Then
No Spouse-Partner

GO TO RESIDENCE SECTION

End A57
End SECTION_A
Section Residences

PLDRESCKPT. CAI Checkpoint: Whether Eligible for Dependent Interviewing

Current Reference Person=Preloaded Reference Person

1. Eligible: Preloaded Residence Valid (NEWPRELOAD[1] RESADDR, RESCITY, RESST, or RESYR = Response)

2. Ineligible: Preloaded Residence Not Valid (NEWPRELOAD[1] RESADDR, RESCITY, RESST, or RESYR <> Response)

GO TO RESDETAILS[1]

3. Ineligible: Current Reference Person is not Preloaded Reference Person

(Assign RESDETAILS[1] ADDRESS & START DATE=NEWPRELOAD)

PLDRESCURR. (CATI) [REFERENCE PERSON]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

These next questions are about places [you have / [REFERENCE PERSON] has] lived during the past two years. In [P2YEAR], the street address of [your / [REFERENCE PERSON]’s] residence was recorded as [PRELOADED ADDRESS]. Is this [your / [REFERENCE PERSON]’s] current address?

- If R says never lived at this address, ENTER [7]
- If needed, PROBE: If [you have / [REFERENCE PERSON] has] more than one residence (for example, a summer home and a winter home), please tell us where [you are / [REFERENCE PERSON] is] currently living.

1. Yes 5. No 7. Never lived at this address (VOL) DK/RF

GO TO RESDETAILS[1].CURRRESCKPT

(WEB) These next questions are about places [you have / [REFERENCE PERSON] has] lived during the past two years. In [P2YEAR], the street address of [your / [REFERENCE PERSON]’s] residence was recorded as [PRELOADED ADDRESS]. Is this [your / [REFERENCE PERSON]’s] current address?

If [you have / [REFERENCE PERSON] has] more than one residence (for example, a summer home and a winter home), please tell us where [you are / [REFERENCE PERSON] is] CURRENTLY living.

1. Yes 5. No 7. Never lived at this address NA

GO TO RESDETAILS[1].CURRRESCKPT

SECTION_RESIDENCE.RESDETAILS[1..6] [1..6]=Which residence

COUNTRY (CTRYNAME), ADDRESS, CITY, STATE (STABBR), ZIP.

(CATI) [REFERENCE PERSON]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

[RESDETAILS[1] & PLDRESCKPT=2, 3; These next questions are about places [you have / [REFERENCE PERSON] has] lived during the past two years.]

What is the street address of [RESDETAILS[1] & PLDRESCKPT=2, 3; or RESDETAILS[2] & PLDRESCURR<>YES: [your / [REFERENCE PERSON]’s] current / ALL OTHERS: that] residence?

- Country
  - [RESDETAILS[1] & PLDRESCKPT=2, 3; or RESDETAILS[2] & PLDRESCURR<>YES: If needed, PROBE: If [you have / [REFERENCE PERSON] has] more than one residence (for example, a summer home and a winter home), please tell us where [you are / [REFERENCE PERSON] is] currently living.]
  - ENTER [185 UNITED STATES] for Puerto Rico, U.S. Virgin Islands, Guam, American Samoa or the Northern Mariana Islands

Select V 1 – 193 (Defaults to 185/US)
What is the street address of your / [REFERENCE PERSON]'s current / that residence?

**Street Address**
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 40

What is the street address of your / [REFERENCE PERSON]'s current / that residence?

**City**
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 40

**State** (For COUNTRY=185)

What is the street address of your / [REFERENCE PERSON]'s current / that residence?

Select 1 – 57 (Assigned 57/FC if Country<>185)

What is the street address of your / [REFERENCE PERSON]'s current / that residence?

**[Zip / Postal] Code**
- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER all [0]'s

String 10

(WEB) [RESDETAILS[1] & PLDRESCKPT=2, 3]: These next questions are about places you have / [REFERENCE PERSON] has lived during the past two years.

What is the street address of [RESDETAILS[1] & PLDRESCKPT=2, 3; or RESDETAILS[2] & PLDRESCURR<>YES]: your / [REFERENCE PERSON]'s CURRENT / ALL OTHERS: that residence?

[RESDETAILS[1] & PLDRESCKPT=2, 3; or RESDETAILS[2] & PLDRESCURR<>YES]: If you have / [REFERENCE PERSON] has more than one residence (for example, a summer home and a winter home), please tell us where you are / [REFERENCE PERSON] is CURRENTLY living.

**Country**

United States includes Puerto Rico, U.S. Virgin Islands, Guam, American Samoa and the Northern Mariana Islands

Select 1 – 193 (Defaults to 185/US)

**Address Line 1**

String 40

**City**

String 40

**State**

Select 1 – 57 (Assigned 57/FC if Country<>185)

**[Zip / Postal] Code**

String 10
SYEAR, SMONTH, SDAY. [CATI] [REFERENCE PERSON]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

When did [you / [REFERENCE PERSON]] start living at this residence?
• ENTER Year
• If necessary: What would be your best estimate?
• Ctrl-D and Ctrl-R not allowed

- 1920 – [P3YEAR] [P2YEAR] – [CYEAR]

GO TO CURRRESCKPT

GO TO CURRRESCKPT

(When did [you / [REFERENCE PERSON]] start living at this residence?)
• ENTER Month or Season (Enter Day at next screen)
• PROBE DK month: Do you know what season it was?

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

GO TO CURRRESCKPT

(When did [you / [REFERENCE PERSON]] start living at this residence?)
• ENTER Day or Part of the Month
• PROBE DK day: Was it the beginning of the month, the middle, or the end (of the month)?

<table>
<thead>
<tr>
<th>Select</th>
<th>1 – 31</th>
<th>41. Beginning of the month</th>
<th>42. Middle of the month</th>
<th>43. End of the month</th>
</tr>
</thead>
</table>

(WEB) When did [you / [REFERENCE PERSON]] start living at this residence?
if you do not know the month, please select the season.
if you do not know the day, please select the part of the month.

- 1920 – [CYEAR]
- 0 9996. [P2YEAR]-[CYEAR] but don’t know which year (SP_0B)
- 0 9997. Before [P2YEAR] but don’t know exact year (SP_0A)

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

<table>
<thead>
<tr>
<th>Select</th>
<th>Day or Part of the Month</th>
<th>For SYEAR=[P2YR-CYR] &amp; SMONTH=1-12 only</th>
<th>1 – 31</th>
<th>41. Beginning of the month</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>42. Middle of the month</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>43. End of the month</td>
<td></td>
</tr>
</tbody>
</table>

CHECK: Please enter a date before today.
SIGNAL for SYEAR=NA: Please enter a YEAR so that you are asked the correct follow up questions. If you can’t remember the exact year, please select “[P2YEAR]-[CYEAR] but don’t know which year” or “Before [P2YEAR] but don’t know exact year”.
CURRRESCKPT. CAI Checkpoint: Whether Current Residence

<table>
<thead>
<tr>
<th>Preloaded Residence Valid (PLDRESCKPT=1)</th>
<th>No Preloaded Residence or Not Valid (PLDRESCKPT=2, 3)</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Assign CURRRES=Yes &amp; END DATE=Today)</td>
<td>(Assign CURRRES=Yes &amp; END DATE=Today)</td>
</tr>
<tr>
<td>GO TO A51</td>
<td>GO TO A51</td>
</tr>
<tr>
<td>(Assign CURRRES=No)</td>
<td>(Assign CURRRES=No)</td>
</tr>
<tr>
<td>GO TO EYEAR</td>
<td>GO TO EYEAR</td>
</tr>
<tr>
<td>(Assign CURRRES=No)</td>
<td>(Assign CURRRES=No)</td>
</tr>
<tr>
<td>GO TO EYEAR</td>
<td>GO TO A51</td>
</tr>
<tr>
<td>(Assign CURRRES=Yes &amp; END DATE=Today)</td>
<td>(Assign CURRRES=Yes &amp; END DATE=Today)</td>
</tr>
<tr>
<td>GO TO A51</td>
<td>GO TO A51</td>
</tr>
<tr>
<td>(Assign CURRRES=No)</td>
<td>(Assign CURRRES=No)</td>
</tr>
<tr>
<td>GO TO EYEAR</td>
<td>GO TO EYEAR</td>
</tr>
</tbody>
</table>

CURRRES. Assigned; not asked.


A51. (CATI) [REFERENCE PERSON]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
Do you think [you / [REFERENCE PERSON]] might move in the next couple of years?
1. Yes  5. No  → GO TO MORERES
GO TO A52

(WEB) Do you think [you / [REFERENCE PERSON]] might move in the next couple of years?
1. Yes  5. No  → GO TO MORERES
GO TO A52

A52. (CATI) [REFERENCE PERSON]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
Would you say [you / [REFERENCE PERSON]] definitely will move, probably will move, or are you more uncertain?
1. Definitely will move  2. Probably will move  3. Are more uncertain

(WEB) Would you say [you / [REFERENCE PERSON]] ...?
1. Definitely will move  2. Probably will move  3. Are more uncertain

A53. (CATI) [REFERENCE PERSON]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
Why [will / might] [you / [REFERENCE PERSON]] move?
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 200
GO TO MORERES

(WEB) Why [will / might] [you / [REFERENCE PERSON]] move?

String 200
GO TO MORERES
EYEAR, EMONTH, EDAY. (CATI) [REFERENCE PERSON]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

When did [you / [REFERENCE PERSON]] stop living at that address?

- ENTER Year
- If necessary: What would be your best estimate?
- Ctrl-D and Ctrl-R not allowed

Select \( \succ \) \([P2YEAR] – [CYEAR]\) 9996. \([P2YEAR] - [CYEAR]\) but don’t know which year

\( \downarrow \) GO TO A50

(When did [you / [REFERENCE PERSON]] stop living at that address?)

- ENTER Month or Season (Enter Day at next screen)
- PROBE DK month: Do you know what season it was?

Select \( \succ \)

\( \downarrow \) GO TO A50

(When did [you / [REFERENCE PERSON]] stop living at that address?)

- ENTER Day or Part of the Month
- PROBE DK day: Was it the beginning of the month, the middle, or the end (of the month)?

Select \( \succ \)
| 1 – 31 | 41. Beginning of the month |
| 42. Middle of the month |
| 43. End of the month |

(WEB) When did [you / [REFERENCE PERSON]] stop living at that address?

If you do not know the month, please select the season.
If you do not know the day, please select the part of the month.

Select \( \succ \)
| Year | \([P2YEAR] – [CYEAR]\); 9996. \([P2YEAR] - [CYEAR]\) but don’t know which year |

Select \( \succ \)
| Month or Season only | For EYEAR=P2YR-CYR |

Select \( \succ \)
| Day or Part of the Month | For EYEAR=P2YR-CYR & EMONTH=1-12 only |
| 1 – 31 | 41. Beginning of the month |
| 42. Middle of the month |
| 43. End of the month |

CHECK: Please enter a date before today.
SIGNAL for EYEAR=NA: Please select a YEAR so that you are asked the correct follow up questions. If you can’t remember the exact year, please select “\([P2YEAR] - [CYEAR]\) but don’t know which year”.
**A50. (CATI) [REFERENCE PERSON]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]**

Why did [you / [REFERENCE PERSON]] move?

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

1. Took a job or stopped school
2. Wanted to be nearer to work
3. Wanted more space or a better place
4. Wanted a smaller or less expensive place
5. Got own home or got married
6. Wanted to live in a better area or closer to family
7. Got divorced, or had a job transfer
8. Other - Please specify: (A50OTHER. Specify. (String 200))

**WEB** Why did [you / [REFERENCE PERSON]] move? Please select all that apply.

1. Took a job or stopped school
2. Wanted to be nearer to work
3. Wanted more space or a better place
4. Wanted a smaller or less expensive place
5. Got own home or got married
6. Wanted to live in a better area or closer to family
7. Got divorced, or had a job transfer
8. Other - Please specify: (A50OTHER)

**MORERESCRIPT. CAI Checkpoint: Whether Preloaded Residence is Response and Current**

<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Preloaded Residence Current (PLDRESCURR=Yes)</td>
<td>4. No Preloaded Residence or Not Valid (PLDRESCKPT=2, 3)</td>
</tr>
<tr>
<td>(Assign MORERES=Yes)</td>
<td></td>
</tr>
<tr>
<td>GO TO RESDETAILS[2]</td>
<td></td>
</tr>
</tbody>
</table>

**MORERES. (CATI) [REFERENCE PERSON]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]**

Have you / Has [REFERENCE PERSON] lived anywhere else since January [P2YEAR]?

1. Yes → REPEAT ADDRESS - A50; Max=6; Then GO TO SECTION BC
5. No

**WEB** Have you / Has [REFERENCE PERSON] lived anywhere else since January [P2YEAR]?

1. Yes → REPEAT ADDRESS - A50; Max=6; Then GO TO SECTION BC
5. No

End RESDETAILS
End SECTION_RESIDENCE
Section BC: Employment

Employment Status

BCDE1. *(CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [Respondent]*

We would like to know about what [you do / [REFERENCE PERSON] does / [SPOUSE-PARTNER] does]. [Are you / Is [REFERENCE PERSON] / Is [SPOUSE-PARTNER]] working now, looking for work, retired, keeping house, a student, or what?

- If R says “Unemployed/Not working”, PROBE: [Are you / Is [REFERENCE PERSON] / Is [SPOUSE-PARTNER]] 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: Anything else?

1. Working now, including serving in the military
2. Only temporarily laid off or on sick or maternity leave
3. Looking for work, unemployed
4. Retired
5. Permanently or temporarily disabled
6. Keeping house
7. A student
8. Other-specify *(BCDE1SPEC. Please tell me what [you /are / he is / she is] doing now. (String 100))*


Please select all that apply.

If [you are / he is / she is] employed and currently working, please select “Working now, including serving in the military”.

If [you are / he is / she is] employed but currently on maternity or sick leave, or laid off for any reason, please select “Employed, but temporarily laid off or on sick or maternity leave”.

If [you are / he is / she is] unemployed, please tell us whether [you are / he is / she is] looking for work or not looking for work.

1. Working now, including serving in the military
2. Employed, but temporarily laid off or on sick or maternity leave
3. Unemployed and looking for work
4. Retired
5. Permanently or temporarily disabled
6. Keeping house
7. A student
8. Other - Please specify: *(BCDE1SPEC)*

*(WEB)* Check for 1, 2 selected with 3, 9: “Working now” or “Temporarily laid off” cannot be selected with “Unemployed (looking or not looking)”.

*(WEB)* Check for 3 and 9 selected together: “Unemployed and looking” cannot be selected with “Unemployed and not looking”.

*(WEB)*
BCDE2 RULE: Whether Retired

- Retired (BCDE1=4)
- All Others

\[ \downarrow \] GO TO BCDE3 RULE

BCDE2. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [Respondent]
In what year did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] (last) retire?
1901 – [CYEAR]

(WEB) In what year did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] (last) retire?
1901 – [CYEAR] Year

BCDE3 RULE: Whether Working or Temporarily Laid Off or On Maternity Leave

- Working, Temp Laid Off, Maternity Leave (BCDE1=1, 2)
- All Others

\[ \downarrow \] GO TO PLDCKPT

BCDE3. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [Respondent]
[Are you / Is [REFERENCE PERSON] / Is [SPOUSE-PARTNER]] doing any work for money now?
1. Yes \[ \rightarrow \] GO TO PLDCKPT

5. No

GO TO BCDE3A

(WEB) [Are you / Is [REFERENCE PERSON] / Is [SPOUSE-PARTNER]] doing any work for money now?
1. Yes \[ \rightarrow \] GO TO PLDCKPT

5. No

GO TO BCDE3A

BCDE3A. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [Respondent]
[Have you / Has [REFERENCE PERSON] / Has [SPOUSE-PARTNER]] done any work for money since January 1, [P2YEAR]? Please include any type of work, no matter how small.
1. Yes

5. No

(WEB) [Have you / Has [REFERENCE PERSON] / Has [SPOUSE-PARTNER]] done any work for money since January 1, [P2YEAR]? Please include any type of work, no matter how small.
1. Yes

5. No
PLDCKPT. CAI Checkpoint: Whether Eligible for Dependent Interviewing

Currently Working or Worked Since P2YEAR (BCDE1=1, 2 or BCDE3=Yes or BCDE3A=Yes)

<table>
<thead>
<tr>
<th>Case</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Currently Working (BCDE1=1, 2 or BCDE3=Yes)</td>
<td>(Assign EMPLOYMENT[1] EMPLOYER &amp; START DATE = NEWPRELOAD) GO TO EMPLOYMENT[1].EMPLOYER</td>
</tr>
<tr>
<td>2. Worked Since P2YEAR (BCDE3A=Yes)</td>
<td>(Assign EMPLOYMENT[1] EMPLOYER &amp; START DATE = NEWPRELOAD &amp; Assign PLDCURR=No) GO TO EMPLOYMENT[1].EMPLOYER</td>
</tr>
<tr>
<td>3. Ineligible: Current RP (SP) is Not Preloaded RP (SP) (Valid, Not Valid or No Preloaded CMJ)</td>
<td>(Assign PRELOAD CMJ &amp; CMJYR = Response) GO TO EMPLOYMENT[1].EMPLOYER</td>
</tr>
<tr>
<td>4. Ineligible: No Preloaded CMJ or Not Valid (NEWPRELOAD CMJ or CMJYR &lt;&gt; Response)</td>
<td>5. No Work Since P2YEAR (BCDE1&lt;&gt;1, 2 &amp; BCDE3&lt;&gt;Yes &amp; BCDE3A&lt;&gt;Yes)</td>
</tr>
</tbody>
</table>

PLDLCURR. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

These next questions are about all of the work for money that [you have / [REFERENCE PERSON] has / [SPOUSE-PARTNER] has] done since January 1, [P2YEAR]. This includes self-employment and any other kind of work that [you have / he has / she has] done for pay. In [P2YEAR], [your / his / her] employer was recorded as [PRELOADED CMJ].

[Are you / Is he / Is she] still employed by this employer?

- If R says “Never employed by this employer”, ENTER [7]
- If R says still employed with this employer but the employer’s name has changed (e.g., due to a merger or was bought by another company) or is spelled incorrectly, ENTER [1] and PROBE: Thank you, we’ll be able to make those changes next

1. Yes 5. No 7. Never employed by this employer (VOL) DK/RF

GO TO EMPLOYMENT[1].EMPLOYER

(WEB) These next questions are about all of the work for money that [you have / [REFERENCE PERSON] has / [SPOUSE-PARTNER] has] done since January 1, [P2YEAR]. This includes self-employment and any other kind of work that [you have / he has / she has] done for pay. In [P2YEAR], [your / his / her] employer was recorded as [PRELOADED CMJ].

[Are you / Is he / Is she] still employed by this employer?

If still employed with this employer but the employer’s name has changed (e.g., due to a merger or was bought by another company), or is spelled incorrectly, please select “1” - you will be able to make any name changes next

1. Yes 5. No 7. Never employed by this employer NA

GO TO EMPLOYMENT[1].EMPLOYER

<table>
<thead>
<tr>
<th>Employment [P2YEAR] – [CYEAR]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employer Name</td>
</tr>
</tbody>
</table>

EMPLOYER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

[EMPLOYMENT[1] & PLDCKPT=1 & PLDCURR=Yes]: IWER: Confirm employer name and spelling - ask question if needed

[EMPLOYMENT[1] & PLDCKPT<>1]: These next questions are about all of the work for money that [you have / [REFERENCE PERSON] has / [SPOUSE-PARTNER] has] done since January 1, [P2YEAR]. This includes self-employment and any other kind of work that [you have / he has / she has] done for pay.


- If [Reference Person / Spouse-Partner] has more than one employer, PROBE: You will be able to give us information about each employer as we go on
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 100

(WEB) [EMPLOYMENT[1]: The calendar at the top of the screen will highlight each employer reported and the dates of employment. The purpose of the calendar is to help you remember what you have reported and may not accurately reflect the exact time period actually worked for each employer. The calendar will appear on several of the following screens.]

[EMPLOYMENT[1] & PLDCKPT=1 & PLDCURR=Yes]: Please make any necessary edits to the employer name, then click Next to continue.

[EMPLOYMENT[1] & PLDCKPT<>1]: These next questions are about all of the work for money that [you have / [REFERENCE PERSON] has / [SPOUSE-PARTNER] has] done since January 1, [P2YEAR]. This includes self-employment and any other kind of work that [you have / he has / she has] done for pay.


If you prefer not to enter the employer’s name, please enter a nickname or anything that will identify this employer to you.

If [you have / he has / she has] more than one employer, you will be able to report each one separately.

String 100

SYEAR RULE. Whether Preloaded CMJ is Current [Note: EMPLOYMENT[1] & Preloaded CMJ Not current already skipped to CURRCKPT]

- GO TO CURRCKPT
- EMPLOYMENT[1] & No Preloaded CMJ or Not Same RP/SP (PLDCKPT=2, 3); or EMPLOYMENT[2..10]
SYEAR, SMONTH, SDAY. \((\text{CATI} \ [\text{CYNAMF}] \ [\text{CYNAML}]: [\text{CYAQRTH}], [\text{CYFUHU}], \text{Age} \ [\text{AGEIWDATE}] \ [[\text{Respondent}]])\)

When did \([\text{you} / \ [\text{REFERENCE PERSON}] / \ [\text{SPOUSE-PARTNER}]\] start working for this employer \([\text{EMPLOYER}] / \ [\text{Employer} \ [1-10]]\)?

- ENTER Year
- If necessary: What would be your best estimate?
- Ctrl-D and Ctrl-R not allowed

<table>
<thead>
<tr>
<th>1920 – [P3YEAR]</th>
<th>[P2YEAR] – [CYEAR]</th>
<th>o 9996. [P2YEAR]-[CYEAR] but don’t know which year (SP_0B)</th>
<th>o 9997. Before [P2YEAR] but don’t know exact year (SP_0A)</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO CURRCKPT</td>
<td>↓</td>
<td>GO TO CURRCKPT</td>
<td></td>
</tr>
</tbody>
</table>

(When did \([\text{you} / \ [\text{REFERENCE PERSON}] / \ [\text{SPOUSE-PARTNER}]\] start working for this employer \([\text{EMPLOYER}] / \ [\text{Employer} \ [1-10]]\)?)

- ENTER Month or Season (Enter Day at next screen)
- PROBE DK month: Do you know what season it was?

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

| 1 – 31 | 41. Beginning of the month |
| 42. Middle of the month |
| 43. End of the month |

GO TO CURRCKPT

(When did \([\text{you} / \ [\text{REFERENCE PERSON}] / \ [\text{SPOUSE-PARTNER}]\] start working for this employer \([\text{EMPLOYER}] / \ [\text{Employer} \ [1-10]]\)?)

- ENTER Day or Part of the Month (Enter Year at next screen)
- PROBE DK day: Was it the beginning of the month, the middle, or the end (of the month)?

<table>
<thead>
<tr>
<th>Select v</th>
<th>1 – 31</th>
<th>41. Beginning of the month</th>
</tr>
</thead>
<tbody>
<tr>
<td>42. Middle of the month</td>
<td></td>
<td></td>
</tr>
<tr>
<td>43. End of the month</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

GO TO CURRCKPT

(WEB) When did \([\text{you} / \ [\text{REFERENCE PERSON}] / \ [\text{SPOUSE-PARTNER}]\] start working for this employer \([\text{EMPLOYER}] / \ [\text{Employer} \ [1-10]]\)?)

*If you do not know the month, please select the season.*

*If you do not know the day, please select the part of the month.*

<table>
<thead>
<tr>
<th>1920 – [CYEAR]</th>
<th>Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>o 9996. [P2YEAR]-[CYEAR] but don’t know which year (SP_0B)</td>
<td></td>
</tr>
<tr>
<td>o 9997. Before [P2YEAR] but don’t know exact year (SP_0A)</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Select v</th>
<th>Month or Season</th>
<th>For SYEAR= P2YR-CYR only</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Select v</th>
<th>Day or Part of the Month</th>
<th>For SYEAR= P2YR-CYR &amp; SMonth=1-12 only</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 – 31</td>
<td>41. Beginning of the month</td>
<td></td>
</tr>
<tr>
<td>42. Middle of the month</td>
<td></td>
<td></td>
</tr>
<tr>
<td>43. End of the month</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

CHECK: Please enter a date before today.

SIGNAL for SYEAR=NA: Please enter a YEAR so that you are asked the correct follow up questions. If you can’t remember the exact year, please select “[P2YEAR]-[CYEAR] but don’t know which year” or “Before [P2YEAR] but don’t know exact year”.
### CURRCKPT. CAI Checkpoint: Whether Currently Working; Whether There is a Preloaded CMJ

#### Currently Working (BCDE1=1, 2 or BCDE3=Yes)

<table>
<thead>
<tr>
<th>Preloaded CMJ Valid (PLDCKPT=1)</th>
<th>No Preloaded CMJ or Not Valid; or Not Same RP (SP) (PLDCKPT=2, 3)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Current (PLDCURR=Yes)</strong></td>
<td><strong>Not Current (PLDCURR =No, DK, RF, NA)</strong></td>
</tr>
<tr>
<td>1. EMPLOYMENT[1]</td>
<td>(Assign CURREMP=Yes &amp; END DATE=Today) GO TO CURREMP</td>
</tr>
<tr>
<td>2. EMPLOYMENT[2]</td>
<td>(Assign CURREMP=Yes &amp; END DATE=Today) GO TO CURREMP</td>
</tr>
<tr>
<td>3. EMPLOYMENT[1]</td>
<td>(Assign CURREMP=No) GO TO CURREMP</td>
</tr>
<tr>
<td><strong>Not Current (PLDCURR =No)</strong></td>
<td><strong>Denied (PLDCURR=7)</strong></td>
</tr>
<tr>
<td>4. EMPLOYMENT[1]</td>
<td>GO TO EYEAR</td>
</tr>
<tr>
<td>5. EMPLOYMENT[1]</td>
<td>GO TO EYEAR</td>
</tr>
<tr>
<td>6. EMPLOYMENT[1]</td>
<td>GO TO MORECKPT</td>
</tr>
<tr>
<td>21. EMPLOYMENT[2..10]</td>
<td>GO TO CURREMP</td>
</tr>
<tr>
<td>22. EMPLOYMENT[2]</td>
<td>GO TO CURREMP</td>
</tr>
<tr>
<td>23. EMPLOYMENT[2..10]</td>
<td>GO TO CURREMP</td>
</tr>
<tr>
<td>24. EMPLOYMENT[2..10]</td>
<td>GO TO CURREMP</td>
</tr>
<tr>
<td>25. EMPLOYMENT[2..10]</td>
<td>GO TO CURREMP</td>
</tr>
</tbody>
</table>

#### Worked Since P2YEAR (BCDE3A=Yes)

<table>
<thead>
<tr>
<th>Preloaded CMJ Valid (PLDCKPT=4)</th>
<th>No Preloaded CMJ or Not Valid; or Not Same RP (SP) (PLDCKPT=2, 3)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Preloaded CMJ Valid</strong></td>
<td><strong>Preloaded CMJ Valid</strong></td>
</tr>
<tr>
<td>4. EMPLOYMENT[1]</td>
<td>(Assign CURREMP=Yes &amp; END DATE=Today) GO TO MORECKPT</td>
</tr>
<tr>
<td>5. EMPLOYMENT[1]</td>
<td>(Assign CURREMP=Yes &amp; END DATE=Today) GO TO MORECKPT</td>
</tr>
<tr>
<td><strong>Not Preloaded CMJ or Not Valid; or Not Same RP (SP)</strong></td>
<td><strong>Not Preloaded CMJ or Not Valid; or Not Same RP (SP)</strong></td>
</tr>
<tr>
<td>24. EMPLOYMENT[2..10]</td>
<td>GO TO CURREMP</td>
</tr>
<tr>
<td>25. EMPLOYMENT[2..10]</td>
<td>GO TO CURREMP</td>
</tr>
</tbody>
</table>

### CURREMP. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

- Are you / Is [REFERENCE PERSON] / Is [SPOUSE-PARTNER] currently employed with this employer ([EMPLOYER] / Employer [1-10])?

1. **Yes** → GO TO MORECKPT

2. **No** → GO TO EYEAR

### WEB [Are you / Is [REFERENCE PERSON] / Is [SPOUSE-PARTNER] currently employed with this employer ([EMPLOYER] / Employer [1-10])?

1. **Yes** → GO TO WEB ASSIGNMENT RULE; Then GO TO MORECKPT

2. **No** → GO TO EYEAR
When did [you / [REFERENCE PERSON]] stop working for this employer ([EMPLOYER] / Employer [1-10])?

- **ENTER Year**
- **If necessary: What would be your best estimate?**
- **Ctrl-D and Ctrl-R not allowed**

Select \( \vee \) \([\text{P2YEAR}] - [\text{CYEAR}]\) 9996. \([\text{P2YEAR}] - [\text{CYEAR}]\) but don’t know which year \( \text{DK/RF} \) Go To Moreckpt

(When did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] stop working for this employer ([EMPLOYER] / Employer [1-10])?)

- **ENTER Month or Season (Enter Day at next screen)**
- **PROBE DK month: Do you know what season it was?**

Select \( \vee \) 1. January  5. May  9. September  21. Winter (Dec-Feb) \( \text{DK/RF} \)

Go To Moreckpt

(When did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] stop working for this employer ([EMPLOYER] / Employer [1-10])?)

- **ENTER Day or Part of the Month (Enter Year at next screen)**
- **PROBE DK day: Was it the beginning of the month, the middle, or the end (of the month)?**

Select \( \vee \) 1 – 31 41. Beginning of the month
  42. Middle of the month
  43. End of the month

Go To Moreckpt

(\( \text{WEB} \)) When did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] stop working for this employer ([EMPLOYER] / Employer [1-10])?

*If you do not know the month, please select the season.*

*If you do not know the day, please select the part of the month.*

Select \( \vee \) Year \([\text{P2YEAR}] - [\text{CYEAR}]\) 9996. \([\text{P2YEAR}] - [\text{CYEAR}]\) but don’t know which year

Select \( \vee \) Month or Season \( \text{For EYEAR} = \text{P2YR-CYR} \) only
  4. April  10. October  24. Fall (Sep-Nov)
  5. May  11. November
  6. June  12. December

Select \( \vee \) Day or Part of the Month \( \text{For EYEAR} = \text{P2YR-CYR} & \text{EMONTH} = 1-12 \) only 1 – 31 41. Beginning of the month
  42. Middle of the month
  43. End of the month

CHECK: Please enter a date before today. CHECK should not trigger if \( \text{DAY} = 41-43 \)

SIGNAL for \( \text{EYEAR} = \text{NA} \): Please select a YEAR so that you are asked the correct follow up questions. If you can’t remember the exact year, please select “\([\text{P2YEAR}] - [\text{CYEAR}]\) but don’t know which year”.

CHECK: Please enter a date before today. CHECK should not trigger if \( \text{DAY} = 41-43 \)

SIGNAL for \( \text{EYEAR} = \text{NA} \): Please select a YEAR so that you are asked the correct follow up questions. If you can’t remember the exact year, please select “\([\text{P2YEAR}] - [\text{CYEAR}]\) but don’t know which year”.

CHECK: Please enter a date before today. CHECK should not trigger if \( \text{DAY} = 41-43 \)

SIGNAL for \( \text{EYEAR} = \text{NA} \): Please select a YEAR so that you are asked the correct follow up questions. If you can’t remember the exact year, please select “\([\text{P2YEAR}] - [\text{CYEAR}]\) but don’t know which year”.

CHECK: Please enter a date before today. CHECK should not trigger if \( \text{DAY} = 41-43 \)

SIGNAL for \( \text{EYEAR} = \text{NA} \): Please select a YEAR so that you are asked the correct follow up questions. If you can’t remember the exact year, please select “\([\text{P2YEAR}] - [\text{CYEAR}]\) but don’t know which year”.

CHECK: Please enter a date before today. CHECK should not trigger if \( \text{DAY} = 41-43 \)

SIGNAL for \( \text{EYEAR} = \text{NA} \): Please select a YEAR so that you are asked the correct follow up questions. If you can’t remember the exact year, please select “\([\text{P2YEAR}] - [\text{CYEAR}]\) but don’t know which year”.

CHECK: Please enter a date before today. CHECK should not trigger if \( \text{DAY} = 41-43 \)

SIGNAL for \( \text{EYEAR} = \text{NA} \): Please select a YEAR so that you are asked the correct follow up questions. If you can’t remember the exact year, please select “\([\text{P2YEAR}] - [\text{CYEAR}]\) but don’t know which year”.

CHECK: Please enter a date before today. CHECK should not trigger if \( \text{DAY} = 41-43 \)

SIGNAL for \( \text{EYEAR} = \text{NA} \): Please select a YEAR so that you are asked the correct follow up questions. If you can’t remember the exact year, please select “\([\text{P2YEAR}] - [\text{CYEAR}]\) but don’t know which year”.

CHECK: Please enter a date before today. CHECK should not trigger if \( \text{DAY} = 41-43 \)

SIGNAL for \( \text{EYEAR} = \text{NA} \): Please select a YEAR so that you are asked the correct follow up questions. If you can’t remember the exact year, please select “\([\text{P2YEAR}] - [\text{CYEAR}]\) but don’t know which year”.

CHECK: Please enter a date before today. CHECK should not trigger if \( \text{DAY} = 41-43 \)

SIGNAL for \( \text{EYEAR} = \text{NA} \): Please select a YEAR so that you are asked the correct follow up questions. If you can’t remember the exact year, please select “\([\text{P2YEAR}] - [\text{CYEAR}]\) but don’t know which year”.

CHECK: Please enter a date before today. CHECK should not trigger if \( \text{DAY} = 41-43 \)

SIGNAL for \( \text{EYEAR} = \text{NA} \): Please select a YEAR so that you are asked the correct follow up questions. If you can’t remember the exact year, please select “\([\text{P2YEAR}] - [\text{CYEAR}]\) but don’t know which year”.

CHECK: Please enter a date before today. CHECK should not trigger if \( \text{DAY} = 41-43 \)

SIGNAL for \( \text{EYEAR} = \text{NA} \): Please select a YEAR so that you are asked the correct follow up questions. If you can’t remember the exact year, please select “\([\text{P2YEAR}] - [\text{CYEAR}]\) but don’t know which year”.

CHECK: Please enter a date before today. CHECK should not trigger if \( \text{DAY} = 41-43 \)

SIGNAL for \( \text{EYEAR} = \text{NA} \): Please select a YEAR so that you are asked the correct follow up questions. If you can’t remember the exact year, please select “\([\text{P2YEAR}] - [\text{CYEAR}]\) but don’t know which year”.

CHECK: Please enter a date before today. CHECK should not trigger if \( \text{DAY} = 41-43 \)

SIGNAL for \( \text{EYEAR} = \text{NA} \): Please select a YEAR so that you are asked the correct follow up questions. If you can’t remember the exact year, please select “\([\text{P2YEAR}] - [\text{CYEAR}]\) but don’t know which year”.
### WEB ASSIGNMENT Rule. Assignment of Missing Data (WEB)

<table>
<thead>
<tr>
<th>SYEAR=NA &amp; CURREMP&lt;&gt;Yes &amp; EYEAR=NA</th>
<th>Assign SYEAR=9996 &amp; assign EYEAR=9996</th>
</tr>
</thead>
<tbody>
<tr>
<td>SYEAR=NA &amp; CURREMP&lt;&gt;Yes &amp; EYEAR=Response</td>
<td>Assign SYEAR=EYEAR</td>
</tr>
<tr>
<td>SYEAR=NA &amp; CURREMP=Yes</td>
<td>Assign SYEAR=CYEAR &amp; assign EYEAR/EMONTH/EDAY=Current date</td>
</tr>
<tr>
<td>SYEAR=9996, 9997, &lt;CYEAR &amp; CURREMP&lt;&gt;Yes &amp; EYEAR=NA</td>
<td>Assign EYEAR=9996</td>
</tr>
<tr>
<td>SYEAR=CYEAR &amp; CURREMP&lt;&gt;Yes &amp; EYEAR=NA</td>
<td>Assign EYEAR=CYEAR</td>
</tr>
<tr>
<td>SYEAR=Response &amp; CURREMP=Yes</td>
<td>Assign EYEAR/EMONTH/EDAY= Current date</td>
</tr>
</tbody>
</table>

### MORECKPT. CAI Checkpoint: Whether Currently Working; Whether There is a Preloaded CMJ


5. All Others

### MOREEMP. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

Is there any other work for money that [you have / [REFERENCE PERSON] has / [SPOUSE-PARTNER] has] done since January 1, [P2YEAR]? Please include self-employment and any other kind of work that [you have / he has / she has] done for pay.

1. Yes → REPEAT EMPLOYER - EYEAR; Max=10; Then GO TO BCDE14ACKPT

5. No → GO TO BCDE14ACKPT

(WEB) Is there any other work for money that [you have / [REFERENCE PERSON] has / [SPOUSE-PARTNER] has] done since January 1, [P2YEAR]? Please include self-employment and any other kind of work that [you have / he has / she has] done for pay.

1. Yes → REPEAT EMPLOYER - EYEAR; Max=10; Then GO TO BCDE14ACKPT

5. No → GO TO BCDE14ACKPT

### End EMPLOYMENT

<table>
<thead>
<tr>
<th>SYEAR (DK/RF not allowed)</th>
<th>CURREMP</th>
<th>EYEAR (DK/RF not allowed)</th>
<th>P2YEAR Job?</th>
<th>PYEAR Job?</th>
<th>CYEAR Job?</th>
<th>Current Job?</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;P2YEAR, 9997</td>
<td>Yes</td>
<td>not asked (assign CYEAR)</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>9996</td>
<td>No, NA</td>
<td>NA (assign 9996)</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>P2YEAR</td>
<td>No, NA</td>
<td>NA (assign 9996)</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>PYEAR</td>
<td>No, NA</td>
<td>NA (assign 9996)</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>CYEAR</td>
<td>No, NA</td>
<td>NA (assign CYEAR)</td>
<td>N</td>
<td>N</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>NA (assign CYEAR)</td>
<td>Yes</td>
<td>not asked (assign CYEAR)</td>
<td>N</td>
<td>N</td>
<td>Y</td>
<td>Y (WEB ONLY)</td>
</tr>
<tr>
<td>&lt;P2YEAR, 9997</td>
<td>No, NA</td>
<td>NA (assign 9996)</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>9996</td>
<td>No, NA</td>
<td>NA (assign 9996)</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>P2YEAR</td>
<td>No, NA</td>
<td>NA (assign 9996)</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>PYEAR</td>
<td>No, NA</td>
<td>NA (assign 9996)</td>
<td>N</td>
<td>N</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>CYEAR</td>
<td>No, NA</td>
<td>NA (assign CYEAR)</td>
<td>N</td>
<td>N</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>NA (assign EYEAR)</td>
<td>No, NA</td>
<td>9996</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>N (WEB ONLY)</td>
</tr>
</tbody>
</table>

(P2YEAR Job? stands for Previous Year Job)
<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
<th>Employment Timeline Text Fill</th>
<th>Equivalence for TOTWKSJOB, TOTWKSJOB2</th>
</tr>
</thead>
<tbody>
<tr>
<td>EMPLOYER</td>
<td>Response</td>
<td>[EMPLOYER]</td>
<td></td>
</tr>
<tr>
<td>EMPLOYER</td>
<td>Non response</td>
<td>Employer [1 – 10]</td>
<td></td>
</tr>
<tr>
<td>SYEAR, EYEAR</td>
<td>CYEAR (&amp; CURREMP=Yes)</td>
<td>Present</td>
<td>XSYEAR, XEYEAR = [CYEAR]</td>
</tr>
<tr>
<td>SYEAR, EYEAR</td>
<td>CYEAR (&amp; CURREMP&lt;&gt;Yes)</td>
<td>[CYEAR]</td>
<td>XSYEAR, XEYEAR = [CYEAR]</td>
</tr>
<tr>
<td>SYEAR, EYEAR</td>
<td>9996. [P2YEAR]-[CYEAR] DK which</td>
<td>[P2YEAR]-[CYEAR]</td>
<td>XSYEAR, XEYEAR = [P2YEAR]</td>
</tr>
<tr>
<td>SMONTH, EMONTH</td>
<td>21. Winter (Dec-Feb)</td>
<td>Win/</td>
<td>XSMONTH, XEMONTH = 1 (Jan)</td>
</tr>
<tr>
<td>SMONTH, EMONTH</td>
<td>22. Spring (Mar-May)</td>
<td>Spr/</td>
<td>XSMONTH, XEMONTH = 4 (Apr)</td>
</tr>
<tr>
<td>SMONTH, EMONTH</td>
<td>23. Summer (Jun-Aug)</td>
<td>Sum/</td>
<td>XSMONTH, XEMONTH = 7 (Jul)</td>
</tr>
<tr>
<td>SMONTH, EMONTH</td>
<td>24. Fall (Sep-Nov)</td>
<td>Fal/</td>
<td>XSMONTH, XEMONTH = 10 (Oct)</td>
</tr>
<tr>
<td>SMONTH, EMONTH</td>
<td>DK, RF, NA</td>
<td>n/a not displayed</td>
<td>XSMONTH, XEMONTH = 99</td>
</tr>
<tr>
<td>SDAY, EDAY</td>
<td>1 – 31</td>
<td>not displayed</td>
<td>XSDAY, XEDAY = 1 – 31</td>
</tr>
<tr>
<td>SDAY, EDAY</td>
<td>41. Beginning of the month</td>
<td>not displayed</td>
<td>XSDAY, XEDAY = 5</td>
</tr>
<tr>
<td>SDAY, EDAY</td>
<td>42. Middle of the month</td>
<td>not displayed</td>
<td>XSDAY, XEDAY = 15</td>
</tr>
<tr>
<td>SDAY, EDAY</td>
<td>43. End of the month</td>
<td>not displayed</td>
<td>XSDAY, XEDAY = 25</td>
</tr>
<tr>
<td>SDAY, EDAY</td>
<td>DK, RF, NA</td>
<td>not displayed</td>
<td>XSDAY, XEDAY = 1</td>
</tr>
</tbody>
</table>

Section_BC[1..2].EmployEHC.Employment[1..10].TOTWKSJOB (0 – 52, 99)
Section_BC[1..2].EmployEHC.Employment[1..10].TOTWKSJOB2 (0 – 52, 99)

<table>
<thead>
<tr>
<th>CALCULATIONS</th>
<th>TOTWKSJOB2</th>
<th>TOTWKSJOB</th>
</tr>
</thead>
<tbody>
<tr>
<td>XSMONTH, XEMONTH =99</td>
<td>99</td>
<td>99</td>
</tr>
<tr>
<td>XSMONTH &amp; XEMONTH = RESPONSE and...</td>
<td></td>
<td></td>
</tr>
<tr>
<td>XSYEAR&lt; P2YEAR &amp; XEYEAR= CYEAR</td>
<td>52</td>
<td>52</td>
</tr>
<tr>
<td>XSYEAR&amp;lt P2YEAR &amp; XEYEAR= P2YEAR</td>
<td>52</td>
<td>#WKS 1/1/P2YR – XEM/XED/P2YR</td>
</tr>
<tr>
<td>XSYEAR&amp;lt P2YEAR &amp; XEYEAR= P2YEAR</td>
<td>52</td>
<td>#WKS 1/1/PYR – XEM/XED/PYR</td>
</tr>
<tr>
<td>XSYEAR&amp;lt P2YEAR &amp; XEYEAR= CYEAR</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>XSYEAR&amp;lt P2YEAR &amp; XEYEAR= P2YEAR</td>
<td>0</td>
<td>#WKS XSM/XSD/PYR – XEM/XED/PYR</td>
</tr>
<tr>
<td>XSYEAR= P2YEAR &amp; XEYEAR= CYEAR</td>
<td>0</td>
<td>52</td>
</tr>
<tr>
<td>XSYEAR= P2YEAR &amp; XEYEAR= P2YEAR</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>XSYEAR= CYEAR &amp; XEYEAR= CYEAR</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>
Section_BC[1..2].EmployEHC1.PYTOTWKS (0 – 52, 99)
a) Establish which weeks 1-52 were worked by each job in PYEAR
b) Count the number of weeks worked by more than one job in PYEAR (concurrent)
c) Count the number of weeks worked by just one job in PYEAR (unique)
d) Add #concurrent weeks + #unique weeks in PYEAR = PYTOTWKS

Section_BC[1..2].EmployEHC1.P2YTOTWKS (0 – 52, 99)
a) Establish which weeks 1-52 were worked by each job in P2YEAR
b) Count the number of weeks worked by more than one job in P2YEAR (concurrent)
c) Count the number of weeks worked by just one job in P2YEAR (unique)
d) Add #concurrent weeks + #unique weeks worked in P2YEAR = P2YTOTWKS

PYear Weeks Worked & Hours per Week Worked

BCDEDKJOBSPY. Whether the number of weeks worked in PYEAR can be computed based on start and end dates of jobs.
BCDEDKJOBSPY=1 if PYEAR number of weeks worked cannot be computed.
If BCDEDKJOBSPY=1 then BCDE14ACKPt=3/Can't Compute Weeks.

BCDE14ACKPT. CAI Checkpoint: Whether Had Job in PYEAR

1. No Jobs PYEAR (BCDEWTRPY=0 For All Jobs)
GO TO BCDE14DCKPT

Jobs PYEAR (BCDEWTRPY=1 For Any Job)

3. Can’t Compute Weeks Worked (BCDEDKJOBSPY=1)
5. Weeks Worked Computed (BCDEDKJOBSPY=0)
GO TO BCDE14B

BCDE14A. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
From the information you have given me on [2 JOBS: both of / >2 JOBS: all of] [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] [1 JOB: job / 2+ JOBS: jobs], [you were / he was / she was] employed approximately [PYTOTWKS] out of 52 weeks in [PYEAR]. Does this sound correct?
1. Yes ➙ GO TO BCDE14BB 5. No

GO TO BCDE14B

(WEB) From the information you have given me on [2 JOBS: both of / >2 JOBS: all of] [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] [1 JOB: job / 2+ JOBS: jobs], [you were / he was / she was] employed approximately [PYTOTWKS] out of 52 weeks in [PYEAR]. Does this sound correct?
1. Yes ➙ GO TO BCDE14BB 5. No

GO TO BCDE14B

BCDE14B. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
Thinking about [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] work in [PYEAR], how many weeks did [you / he / she] actually work on [all of] [your / his / her] job / jobs in [PYEAR], not counting time off for vacations, sick time, and unemployment?
0 ➙ GO TO BCDE14C 1 – 52 [DK/RF
GO TO BCDE14BB

(WEB) Thinking about [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] work in [PYEAR], how many weeks did [you / he / she] actually work on [all of] [your / his / her] job / jobs in [PYEAR], not counting time off for vacations, sick time, and unemployment?
0 ➙ GO TO BCDE14C 1 – 52 Weeks NA
GO TO BCDE14BB

CHECK: Please enter a number from 0 to 52.
On average, how many hours a week did [you / he / she] work on [all of] [your / his / her] [job / 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

On average, how many hours per week did [you / he / she] work on [all of] [your / his / her] [job / jobs] during [PYEAR]?

1 – 112 Hours per week NA → GO TO BCDE14DCKPT

CHECK: Please enter a number from 1 to 112.

Did [you / he / she] work any overtime which isn’t included in that?

1. Yes 5. No → GO TO BCDE14DCKPT

Did [you / he / she] work any overtime which is NOT included in that?

1. Yes 5. No → GO TO BCDE14DCKPT

How many hours did that overtime amount to (on [all of] [your / his / her] [job / 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

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. Specify. (String 100))

How many hours did that overtime amount to on [all of] [your / his / her] [job / jobs] in [PYEAR]?

1 – 3760 Hours per 3. Week 4. Two weeks 5. Month 6. Year

CHECK: Please enter a number from 1 to 3760.

SIGNAL: Please select a unit of time.

GO TO BCDE14DCKPT
BCDE14C. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

IWER: The EHC indicates that [[REFERENCE PERSON] / [SPOUSE-PARTNER]] had a job in [PYEAR], but BCDE14B is '00' for total weeks worked in [PYEAR]. Please explain why.

String 500

(WEB) You reported that [you were / [REFERENCE PERSON] was / [SPOUSE-PARTNER] was] employed in [PYEAR], but worked a total of 0 weeks. Could you please tell us more about that?

String 500

BCDEDKJOBSSPY. Whether the number of weeks worked in P2YEAR can be computed based on start and end dates of jobs.

BCDEDKJOBSSPY=1 if P2YEAR number of weeks worked cannot be computed.

If BCDEDKJOBSSPY=1 then BCDE14DCKP=3/ Can’t Compute Weeks.

BCDE14DCKP. CAI Checkpoint: Whether Had Job in P2YEAR

<table>
<thead>
<tr>
<th>1. No Jobs P2YEAR (BCDEWTRPPY=0 For All Jobs)</th>
<th>Jobs P2YEAR (BCDEWTRPPY=1 For Any Job)</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO BC15CKPT</td>
<td>3. Can’t Compute Weeks Worked (BCDEDKJOBSSPY=1)</td>
</tr>
<tr>
<td></td>
<td>5. Weeks Worked Computed (BCDEDKJOBSSPY=0)</td>
</tr>
</tbody>
</table>

GO TO BCDE14E

P2Year Weeks Worked & Hours per Week Worked

BCDE14D. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

For the year before last, [P2YEAR], from the information you have given me on [both of / all of] [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] [job / jobs], [you were / he was / she was] employed approximately [P2YTOTWKS] out of 52 weeks in [P2YEAR]. Does this sound correct?

1. Yes → GO TO BCDE14EE 5. No

GO TO BCDE14E

(WEB) For the year before last, [P2YEAR], from the information you have given me on [both of / all of] [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] [job / jobs], [you were / he was / she was] employed approximately [P2YTOTWKS] out of 52 weeks in [P2YEAR]. Does this sound correct?

1. Yes → GO TO BCDE14EE 5. No

GO TO BCDE14E

BCDE14E. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

Thinking about [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] work in [P2YEAR], how many weeks did [you / he / she] actually work on [all of] [your / his / her] [job / jobs] in [PYEAR], not counting time off for vacations, sick time, unemployment, etc.?

0 → GO TO BCDE14F 1 – 52 DK/RF

GO TO BCDE14EE

(WEB) Thinking about [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] work in [P2YEAR], how many weeks did [you / he / she] actually work on [all of] [your / his / her] [job / jobs] in [P2YEAR], not counting time off for vacations, sick time, and unemployment?

0 → GO TO BCDE14F 1 – 52 Weeks NA

GO TO BCDE14EE

CHECK: Please enter a number from 0 to 52.
BCDE14E. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

On average, how many hours a week did [you / he / she] work on [all of] [your / his / her] [job / 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 END EMPLOYEHC1

(WEB) On average, how many hours per week did [you / he / she] work on [all of] [your / his / her] [job / jobs] during [P2YEAR]?

1 – 112  Hours per week  →  GO TO END EMPLOYEHC1

CHECK: Please enter a number from 1 to 112.

BCDE14F. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

IWER: The EHC indicates that [[REFERENCE PERSON] / [SPOUSE-PARTNER]] had a job in [P2YEAR], but BCDE14E is '00' for total weeks worked in [P2YEAR]. Please explain why.

String 500

(WEB) You reported that [you were / [REFERENCE PERSON] was / [SPOUSE-PARTNER] was] employed in [P2YEAR], but worked a total of 0 weeks. Could you please tell us more about that?

String 500

End EMPLOYEHC1
<table>
<thead>
<tr>
<th>Field</th>
<th>Values</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AQSNOFU</td>
<td>1-24</td>
<td>AQSN of FU member</td>
</tr>
<tr>
<td>JobNum</td>
<td>1-10</td>
<td>Which job</td>
</tr>
<tr>
<td>EmpName</td>
<td></td>
<td>Employer name</td>
</tr>
<tr>
<td>JobType</td>
<td>1, 2, 3</td>
<td>1=CMJ, 2=MRMJ, 3=Other Job</td>
</tr>
<tr>
<td>SameCMJPreload</td>
<td>1, 5</td>
<td>1=This job same CMJ as last wave; 5=This job is not same CMJ or is MRMJ, Other</td>
</tr>
</tbody>
</table>

**SECTION_B[1..2].JOBS[1..10]**

<table>
<thead>
<tr>
<th>Field</th>
<th>Values</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AQSNOFU</td>
<td>1-24</td>
<td>AQSN of FU member</td>
</tr>
<tr>
<td>BCJobNum</td>
<td>1-10</td>
<td>Which job</td>
</tr>
<tr>
<td>BCEmpName</td>
<td></td>
<td>Employer name</td>
</tr>
<tr>
<td>BCWTRP2Year</td>
<td>0, 1</td>
<td>1=Worked this job in P2YEAR</td>
</tr>
<tr>
<td>BCWTRP1Year</td>
<td>0, 1</td>
<td>1=Worked this job in PYEAR</td>
</tr>
<tr>
<td>BCWTRCYear</td>
<td>0, 1</td>
<td>1=Worked this job in CYEAR</td>
</tr>
<tr>
<td>BCCur</td>
<td>0, 1</td>
<td>1=Job is current</td>
</tr>
<tr>
<td>BCMostRec</td>
<td>0, 1</td>
<td>1=Job is most recent</td>
</tr>
</tbody>
</table>

Select CMJ or MRMJ

BC15CKPT. CAI Checkpoint: Number and Types of Job

<table>
<thead>
<tr>
<th>Employers Reported (BCWTRWRK=1)</th>
<th>5. All Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. One Current Job</td>
<td>2. 2+ Current Jobs</td>
</tr>
<tr>
<td>3. One Most Recent Job</td>
<td>4. 2+ Most Recent Jobs</td>
</tr>
</tbody>
</table>

GO TO BC19CKPT

GO TO BC19CKPT

GO TO BC70

BC16. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

You have just told me that [you are / [REFERENCE PERSON] is / [SPOUSE-PARTNER] 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
- [Ctrl-D] and [Ctrl-R] not allowed

1 – 10. [EMPLOYER]

(Assign BC18.JOBTYPE=CMJ for selected job)

GO TO BC19CKPT

WEB Which one of these jobs [do you / does [REFERENCE PERSON] / does [SPOUSE-PARTNER]] consider to be [your / his / her] main job?

1 – 10. [EMPLOYER] / Employer [1-10]

(Assign BC18.JOBTYPE=CMJ for selected job)

GO TO BC19CKPT

BC17. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

You mentioned [#] 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
- [Ctrl-D] and [Ctrl-R] not allowed

1 – 10. [EMPLOYER]

(Assign BC18.JOBTYPE=MRMJ for selected job)

WEB Which one of these jobs [do you / does [REFERENCE PERSON] / does [SPOUSE-PARTNER]] consider to have been [your / his / her] main job?

1 – 10. [EMPLOYER] / Employer [1-10]

(Assign BC18.JOBTYPE=MRMJ for selected job)
Individual Job Information


BC19CKPT. CAI Checkpoint: Whether Worked This Job in PYEAR–CYEAR

1. Worked This Job PYEAR–CYEAR
   (BCWTRP1YEAR=1 or BCWTRCYEAR=1)  5. All Others → GO TO BC47CKPT

BC19BCKPT. CAI Checkpoint: Whether Eligible for Dependent Interviewing

1. Eligible: CMJ Same as Preloaded CMJ & Preloaded BCDE21A Valid (CMJ & REINT & SAME CMJ & SAME RP (SP) & NEWPRELOAD.BCDE21A=Response)
3. Ineligible: CMJ Not Same as Preloaded CMJ (CMJ & REINT & SAME RP (SP) - But Not Same CMJ)
4. Ineligible: CMJ Same as Preloaded CMJ but Preloaded BCDE21A Not Valid; or Different RP (SP); or Not Reinterview
   - But NEWPRELOAD.BCDE21A<>Response
   a. CMJ & REINT & SAME CMJ & SAME RP (SP)
   b. CMJ & REINT - But Not Same RP (SP)
   c. CMJ - But Not REINT)
5. All Others → GO TO BC20

CMJ

REINT: Same CMJ; ALL OTHER IWS: n/a

BC19B. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
EMPLOYER: [EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR])
Is this [your / his / her] current job title?
1. Yes NEWPRELOAD.BCDE20CODE<>Response → (Assign BC21A=NEWPRELOAD) GO TO BC20
   NEWPRELOAD.BCDE20CODE=Response → (Assign BC21A & BC20CODE=NEWPRELOAD) GO TO BC21CKPT
5. No → GO TO BC21A

(WEB) In [P2YEAR], [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] job title at [EMPLOYER / Employer [1-10]] was recorded as: [NEWPRELOAD.BCDE21A]
Is this [your / his / her] current job title?
1. Yes NEWPRELOAD.BCDE20CODE<>Response → (Assign BC21A=NEWPRELOAD) GO TO BC20
   NEWPRELOAD.BCDE20CODE=Response → (Assign BC21A & BC20CODE=NEWPRELOAD) GO TO BC21CKPT
5. No → GO TO BC21A

CMJ

REINT: Same CMJ & BC19B<>Yes, or CMJ Not Same, or CMJ Ineligible; ALL OTHER IWS: CMJ

BC21A. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
EMPLOYER: [EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR])
What is the official title of [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] job? (The title that [your / his / her] employer uses.)

String 200

(WEB) What is the official title of [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] job at [EMPLOYER / Employer [1-10]], that is, the title that [your / his / her] employer uses?

String 200
BC20 RULE: Whether Same CMJ as Last Wave (BC18 SAMECMJ/RELOAD); Whether Same Job Title as Last Wave (BC19B)

<table>
<thead>
<tr>
<th>CMJ Same as Preloaded CMJ But Title Not Same as Last Wave (CMJ &amp; REINT &amp; SAME CMJ &amp; SAME RP (SP) - But BC19B&lt;&gt;Yes)</th>
<th>All Others (incl CMJ &amp; REINT &amp; SAME CMJ &amp; SAME RP (SP) - But BC19B Not Asked (BC19BCKPT=3, 4))</th>
<th>→ GO TO BC20</th>
</tr>
</thead>
</table>

**CMJ**

**REINT:** Same CMJ & BC19B<>Yes; ALL OTHER IWS: n/a

BC20CKPT. (CATI) [CYNAMF] [CYNAML]: [CYAQRSTH], [CYFUHU]; Age [AGEIWDATE] [(Respondent)]

**EMPLOYER:** [EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR])

Interviewer Checkpoint: You entered that [[REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s job title for this job has changed from [PRELOAD BCDE21A] to [BC21A]. Did R mention that the sort of work [[REFERENCE PERSON] / [SPOUSE-PARTNER]] does - job duties and activities - are the same even though the job title has changed?

**ASK R if needed:** Are [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] duties and activities on your job with [EMPLOYER] the same even though [your / his / her] job title has changed?

| 1. Yes, job duties and activities are the same | 5. No, job duties and activities are different |
| NEWPRELOAD.BCDE20CODE<>Response → GO TO BC20 | GO TO BC20 |
| NEWPRELOAD.BCDE20CODE=Response → (Assign BC20CODE=NEWPRELOAD) GO TO BC21CKPT |

(WEB) At [[EMPLOYER] / Employer [1-10]], is the sort of work [you do / [REFERENCE PERSON] does / [SPOUSE-PARTNER] does] – job duties and activities – the same even though [your / his / her] job title has changed?

| 1. Yes, job duties and activities are the same | 5. No, job duties and activities are different |
| NEWPRELOAD.BCDE20CODE<>Response → GO TO BC20 | GO TO BC20 |
| NEWPRELOAD.BCDE20CODE=Response → (Assign BC20CODE=NEWPRELOAD) GO TO BC21CKPT |

**ALL JOBS PY-CY**

**REINT:** Same CMJ/Title Not Same, or CMJ Not Same, or CMJ Inel, or PY-CY MRMJ/Other; ALL OTHER IWS: CMJ or PY-CY MRMJ/Other

BC20. (CATI) [CYNAMF] [CYNAML]: [CYAQRSTH], [CYFUHU]; Age [AGEIWDATE] [(Respondent)]

**EMPLOYER:** [EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR])

(And) the job with [EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR]), ...

In [your / his / her] work for [EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR]), [CMJ]: what is [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] occupation? What sort of work [do you / does he / does she] do? What are [your / his / her] most important activities or duties? / MRMJ: what was [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] occupation? What sort of work did [you / he / she] do? What were [your / his / her] most important activities or duties? / OTHER JOB: what sort of work [CURRENT: do you / does he / does she] do / NOT CURRENT: did [you / he / she] do?]

- [CMJ, MRMJ: PROBE up to 3 times if needed]
- [MRMJ: If needed, PROBE for most recent occupation at this employer]
- [OTHER JOB: DO NOT PROBE]

Open End → GO TO BC21CKPT

(WEB) In [your / his / her] work for [[EMPLOYER] / Employer [1-10]], what [CMJ: is / MRMJ: was] [your / [REFERENCE PERSON/ SPOUSE-PARTNER]’s] occupation [MRMJ: when [you / he / she] left that employer]?

Open End

GO TO BC20A
BC20A. *(WEB ONLY)* In [your / his / her] work for [[EMPLOYER] / Employer [1-10]], what sort of work 

*CMJ:* do 

*MRMJ:* did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] do?

Open End

BC20B RULE: Whether this job is a CMJ, MRMJ, or Other

<table>
<thead>
<tr>
<th>CMJ, MRMJ (JOBTYPE=1, 2)</th>
<th>Other Job (JOBTYPE=3)</th>
<th>GO TO BC21CKPT</th>
</tr>
</thead>
</table>

BC20B. *(WEB ONLY)* In [your / his / her] work for [[EMPLOYER] / Employer [1-10]], what *CMJ:* are / *MRMJ:* were [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] most important activities or duties?

Open End

BC21CKPT. CAI Checkpoint: Whether Eligible for Dependent Interviewing

1. Eligible: CMJ Same as Preloaded CMJ & Preloaded 
   BCDE21CODE Valid
   (CMJ & REINT & SAME CMJ & SAME RP (SP) & NEWPRELOAD.
   BCDE21CODE = Response)
   (Assign BC21CODE=NEWPRELOAD)
   GO TO BC21BCKPT

3. Ineligible: CMJ Not Same as Preloaded CMJ
   (CMJ & REINT & SAME RP (SP) - But Not Same CMJ)

4. Ineligible: CMJ Same as Preloaded CMJ
   but Preloaded BCDE21CODE Not Valid; or
   Different RP (SP); or Not Reinterview
   a. CMJ & REINT & SAME CMJ & SAME RP (SP)
   - But NEWPRELOAD.BCDE21CODE<>Response
   b. CMJ & REINT - But Not Same RP (SP)
   c. CMJ - But Not REINT)

5. All Others

ALL JOBS PY-CY
REINT: CMJ Not Same, or CMJ Ineligible, or PY-CY MRMJ/Other; ALL OTHER IWS: CMJ, or PY-CY MRMJ/Other

BC21. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

EMPLOYER: [EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR])

((And) the job with [EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR]),...)

What kind of business or industry *CMJ:* is / *MRMJ:* was that in?

- [JOBTYPE=OTHER: DO NOT PROBE]

Open End

*(WEB)* What kind of business or industry *CMJ:* is / *MRMJ:* was that in at [[EMPLOYER] / Employer [1-10]]?

Open End

BC21BCKPT. CAI Checkpoint: Job Type

1. CMJ (JOBTYPE=1) 3. MRMJ (JOBTYPE=2) 5. Other Job (JOBTYPE=3) → GO TO BC22ACKPT
CMJ or PY-CY MRMJ

BC21B1. (CARI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
EMPLOYER: [EMPLOYER] [[SMONTH/SYEAR] – [EMONTH/EYEAR]]

[CMJ: Do / MRMJ: Did] [you / [REFERENCE PERSON] / [SPouse-PARTNER]] commute to work, [CMJ: do / MRMJ: did] [you / he / she] work from home, or both?

1. Commute to work only  2. Work from home only  3. Both commute and work from home  DK/RF

GO TO BC21B   GO TO BC22ACKPT   GO TO BC21B2

(WEB) For [your / his / her] job at [[EMPLOYER] / Employer [1-10]], [CMJ: do / MRMJ: did] [you / [REFERENCE PERSON] / [SPouse-PARTNER]]…?

1. Commute to work only  2. Work from home only  3. Both commute and work from home

GO TO BC21B   GO TO BC22ACKPT   GO TO BC21B2

BC21B2. (CARI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
EMPLOYER: [EMPLOYER] [[SMONTH/SYEAR] – [EMONTH/EYEAR]]

In a typical week, about how much of [your / his / her] work time [CMJ: is / MRMJ: was] spent working from home? Would you say more than half, about half, or less than half?

1. More than half  2. About half  3. Less than half

(WEB) In a typical week, about how much of [your / his / her] work time [CMJ: is / MRMJ: was] spent working from home?

1. More than half  2. About half  3. Less than half

BC21B. (CARI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
EMPLOYER: [EMPLOYER] [[SMONTH/SYEAR] – [EMONTH/EYEAR]]

On a typical day, [BC21B1=BOTH: when [you / he / she] [CMJ: commute[s] / MRMJ: commuted] to work,] how many minutes [CMJ: is / MRMJ: was] [your / his / her] round trip commute to and from work?

1 – 900 0996. Do not work at same location every day (SP_0B) 0995. Uses temporary lodging near work (VOL) (SP_OC)

(WEB) On a typical day, [BC21B1=BOTH: when [you / he / she] [CMJ: commute / MRMJ: commuted] to work,] how many minutes [CMJ: is / MRMJ: was] [your / [REFERENCE PERSON]’s / [SPouse-PARTNER]’s] ROUND-TRIP commute to and from [[EMPLOYER] / Employer [1-10]]?

1 – 900 0996. Do not work at same location every day (SP_0B)

CHECK: Please enter a number from 1 to 900.

BC22ACKPT. CAI Checkpoint: Whether Eligible for Dependent Interviewing

1. Eligible: CMJ Same as Preloaded CMJ & Preloaded BCDE22=SomeOne Else (CMJ & REINT & SAME CMJ & SAME RP (SP) & NEWPRELOAD. BCDE22=1)

(Assign BC22=NEWPRELOAD) GO TO BC24CKPT

3. Ineligible: CMJ Not Same as Preloaded CMJ (CMJ & REINT & SAME RP (SP) - But Not Same CMJ)

4. Ineligible: CMJ Same as Preloaded CMJ but Preloaded BCDE22<>SomeOne Else; or Different RP (SP); or Not Reinterview (a. CMJ & REINT & SAME CMJ & SAME RP (SP) - But NEWPRELOAD.BCDE22<>1 b. CMJ - REINT - But Not Same RP (SP) c. CMJ - But Not REINT)

5. All Others

↓
ALL JOBS PY-CY
REINT: CMJ Not Same, or CMJ Ineligible, or PY-CY MRMJ/Other; ALL OTHER IWS: CMJ, or PY-CY MRMJ/Other

BC22. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
EMPLOYER: [EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR])

[[Are / Were] you] / [Is / Was] [REFERENCE PERSON] / [SPOUSE-PARTNER]] self-employed, [[are / were] you / [is / was] he / [is / was] 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 BC25ACKPT

GO TO BC24CKPT  GO TO BC23

(WEB) At [[EMPLOYER] / Employer [1-10]], [[are / were] you / [is / was] [REFERENCE PERSON] / [SPOUSE-PARTNER]]...

1. Employed only by someone else  2. Employed both by someone else and [yourself / himself/ herself] (self-employed)  3. Self-employed only  NA → GO TO BC23

GO TO BC23

BC23. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
EMPLOYER: [EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR])

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

1. Unincorporated  2. Corporation

GO TO BC25ACKPT  GO TO BC23

(WEB) Is [[EMPLOYER] / Employer [1-10]] an unincorporated business or a corporation?

1. Unincorporated  2. Corporation

GO TO BC25ACKPT

BC24CKPT. CAI Checkpoint: Whether Eligible for Dependent Interviewing

1. Eligible: CMJ Same as Preloaded CMJ & Preloaded BCDE22=Someone Else Only & Preloaded BCDE24 Valid
(CMJ & REINT & SAME CMJ & SAME RP (SP) & NEWPRELOAD.BCDE22=1 & NEWPRELOAD.BCDE24=Response)

(Assign BC24=NEWPRELOAD)  GO TO BC25ACKPT

3. Ineligible: CMJ Not Same as Preloaded CMJ & BC22=Someone Else Only
(CMJ & REINT & SAME RP (SP) & BC22=1 - But Not Same CMJ)

4. Ineligible: CMJ Same as Preloaded CMJ & (Preloaded BCDE22=Someone Else Only but Preloaded BCDE24 Not Valid; or Preloaded BCDE22<>Someone Else Only & BC22=Someone Else Only); or Different RP (SP) & BC22=Someone Else Only; or Not Reinterview & BC22=Someone Else Only
(a. CMJ & REINT & SAME CMJ & SAME RP (SP) & NEWPRELOAD.BCDE22=1 - But NEWPRELOAD.BCDE24<>Response
b. CMJ & REINT & SAME CMJ & SAME RP (SP) & BC22=1 - But NEWPRELOAD.BCDE22<>1
c. CMJ & REINT & BC22=1 - But Not Same RP (SP)
d. CMJ & BC22=1 - But Not REINT)

5. All Others
ALL JOBS PY-CY and BC22=Someone Else Only
REINT: CMJ Not Same, or CMJ Ineligible, or PY-CY MRMJ/Other; ALL OTHER IWS: CMJ, or PY-CY MRMJ/Other

BC24. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
EMPLOYER: [EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR])
[Do / Did] you / [Does / Did] [REFERENCE PERSON] / [SPOUSE-PARTNER] work for the government or a private company?
- IF R says government PROBE: Is that the federal, state, or local government?
  1. Federal government
  2. State government
  3. Local government
  4. Private non-government
  7. Other-specify (BC24SPEC. Specify. (String 100)) (WEB) At [[EMPLOYER] / Employer [1-10]], [[do / did] you / [does / did] [REFERENCE PERSON] / [SPOUSE-PARTNER]] work for...?
    1. The federal government
    2. A state government
    3. A local government
    4. A private company
    7. Other - Please specify: (BC24SPEC)

BC25ACKPT. CAI Checkpoint: Whether Eligible for Dependent Interviewing

1. Eligible: CMJ Same as Preloaded CMJ & Preloaded BCDE25A Valid
   (CMJ & REINT & SAME CMJ & SAME RP (SP) & NEWPRELOAD.BCDE25A=Response)
   (Assign BC25A=NEWPRELOAD)
   GO TO BC26CKPT

3. Ineligible: CMJ Not Same as Preloaded CMJ
   (CMJ & REINT & SAME CMJ & SAME RP (SP) - But Not Same CMJ)

4. Ineligible: CMJ Same as Preloaded CMJ but Preloaded BCDE25A Not Valid; or Different RP (SP); or Not Reinterview
   (a. CMJ & REINT & SAME CMJ & SAME RP (SP) - But NEWPRELOAD.BCDE25A<>Response
   b. CMJ & REINT - But Not Same RP (SP)
   c. CMJ - But Not REINT)

5. All Others
   GO TO BC42CKPT

CMJ
REINT: CMJ Not Same, or CMJ Ineligible; ALL OTHER IWS: CMJ

BC25A. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
EMPLOYER: [EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR])
Including [yourself / [REFERENCE PERSON] / [SPOUSE-PARTNER]], about how many people are employed
[BC22=SOMEONE ELSE ONLY: (by [[EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR]])] at the location where
you work / [REFERENCE PERSON] works / [SPOUSE-PARTNER] works]?

1 – 999,999,997 → GO TO BC26CKPT
1 – 999,999,997 → GO TO BC26CKPT

(DK/RF) → GO TO BC25B

Number of employees NA → GO TO BC25B_BC25F

CHECK: Please enter a number from 1 to 999999997.
BC25B. *(CATI ONLY)* Are there 200 or more?

1. Yes
5. No DK/RF → GO TO BC26CKPT

BC25E. *(CATI ONLY)* 500 or more?  

BC25C. *(CATI ONLY)* 100 or more?

1. Yes
5. No DK/RF → GO TO BC26CKPT

BC25F. *(CATI ONLY)* 1000 or more?

BC25D. *(CATI ONLY)* 50 or more?

1. Yes
5. No DK/RF

GO TO BC26CKPT

BC25BBC25F._W. *(WEB ONLY)* What is your best estimate?

1. Less than 50 employees
2. 50 to less than 100 employees
3. 100 to less than 200 employees
4. 200 to less than 500 employees
5. 500 to less than 1000 employees
6. 1000 or more employees

BC26CKPT. CAI Checkpoint: Whether Eligible for Dependent Interviewing

1. Eligible: CMJ Same as Preloaded CMJ & Preloaded BCDE22=Someone Else Only & Title Same as Last Wave & Preloaded BCDE26/BCDE27 Valid (CMJ & REINT & SAME CMJ & SAME RP (SP) & BC22=Someone Else Only & BCDE26/BCDE27 Valid)

2. Ineligible: CMJ Same as Preloaded CMJ Wave & Preloaded BCDE22=Someone Else Only & Title Not Same as Last Wave (CMJ & REINT & SAME CMJ & SAME RP (SP) & BC22=1 - But BC19B<>Yes)

3. Ineligible: Not Same as Preloaded CMJ (CMJ & REINT & SAME RP (SP) & BC22=1 - But Not Same CMJ)

4. Ineligible: CMJ Same as Preloaded CMJ & (Preloaded BC22=Someone Else Only but Preloaded BCDE26/BCDE27 Not Valid; or Preloaded BCDE22<>Someone Else Only & BC22=Someone Else Only); or Different RP (SP) & BC22=Someone Else Only; or Not Reinterview & BC22=Someone Else Only (a. CMJ & REINT & SAME CMJ & SAME RP (SP) & BC19B=Yes & NEWPRELOAD.BCDE26<>Response or NEWPRELOAD.BCDE27<>Response; b. CMJ & REINT & SAME CMJ & SAME RP (SP) & BC19B=Yes & BC22=1 - But NEWPRELOAD.BCDE26<>Response or NEWPRELOAD.BCDE27<>Response; c. CMJ & REINT & BC22=1 - But Not Same RP (SP) & d. CMJ & BC22=1 - But Not REINT)

5. All Others GO TO BC28

**BC26. (CATI)** [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] 
EMPLOYER: [BC EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR])
Is [your / his / her] current job covered by a union contract?

1. Yes
5. No → GO TO BC28A

GO TO BC27

**WEB** Is [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] current job at [[EMPLOYER] / Employer [1-10]] covered by a union contract?

1. Yes
5. No → GO TO BC28A

GO TO BC27
BC27. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
EMPLOYER: [EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR])
[Do you / Does [REFERENCE PERSON] / Does [SPOUSE-PARTNER]] belong to that labor union?

1. Yes  5. No

GO TO BC28A

(WEB) [Do you / Does [REFERENCE PERSON] / Does [SPOUSE-PARTNER]] belong to that labor union?

1. Yes  5. No

GO TO BC28A

CMJ and BC22<>Someone Else Only

BC28. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
EMPLOYER: [EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR])
Interviewer Checkpoint:
Is [[REFERENCE PERSON] / [SPOUSE-PARTNER]] a farmer or rancher?
• Ask R only if you are unclear about the answer.

1. Yes  5. No

(WEB) [Are you / Is [REFERENCE PERSON] / Is [SPOUSE-PARTNER]] a farmer or rancher at [[EMPLOYER] / Employer [1-10]]?

1. Yes  5. No

CMJ

BC28A. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
EMPLOYER: [EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR])
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

(WEB) At [[EMPLOYER] / Employer [1-10]], how often does [your / [REFERENCE PERSON]/ SPOUSE-PARTNER]’s work require the use of a computer?

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

CMJ

BC29. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
EMPLOYER: [EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR])
On [your / his / her] main job for [[EMPLOYER]] ([SMONTH/SYEAR] – [EMONTH/EYEAR]), [are you / is [REFERENCE PERSON] / is [SPOUSE-PARTNER]] salaried, paid by the hour, or what?


GO TO BC30  6. Hourly + commission  GO TO BC38

GO TO BC33
BC38. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [Respondent]

**EMPLOYER: [EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR])**

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** (BC38SPEC. **Specify** (String 500))

(***WEB***) How [are you / is [REFERENCE PERSON] / is [SPOUSE-PARTNER]] paid on [your / his / her] main job at [[EMPLOYER] / Employer [1-10]]?

1. Piecework or hourly plus piecework
2. Commission
5. Self-employed, farmer, draw on profits
6. By the job, by the day, or by the mile
7. **Other - Please specify:** (BC38SPEC)

BC39. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [Respondent]

**EMPLOYER: [EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR])**

If [you / he / she] worked an extra hour, how much would [you / he / she] earn for that hour?

- **PER hour**
  - $0.00 – 999,997.00 → GO TO BC39ACKPT

(***WEB***) At [[EMPLOYER] / Employer [1-10]], if [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] worked an extra hour, how much would [you / he / she] earn for that hour?

$0.00 – 999,997.00 → GO TO BC39ACKPT

**CHECK:** Please enter a number from 0.0 to 999997.00.

**CMJ:** BC29=1. Salaried or 2. Salary + commission

BC30, BC30PER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [Respondent]

**EMPLOYER: [EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR])**

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 – 9,999,997.00 DK/RF → GO TO BC31

  ↓

  - **The salary amount entered is:** [BC30] per ____
  - **SELECT the unit of time below**

7. **Other-specify** (BC30PERSPEC. **Specify**. (String 100))

(***WEB***) How much is [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] salary at [[EMPLOYER] / Employer [1-10]]?

$1.00 – 9,999,997.00 per 3. Week 4. Two weeks 5. Month 6. Year

**CHECK:** Please enter a number from 1.00 to 9999997.00.

**SIGNAL:** Please select a unit of time.
CMJ: BC29=1. Salaried or 2. Salary + commission

BC31. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
EMPLOYER: [EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR])
If [you / he / she] were to work more hours per week than usual, would [you / he / she] get paid for those extra hours of work?

1. Yes  5. No  → GO TO BC35CKPT

GO TO BC32

(WEB) At [[EMPLOYER] / Employer [1-10]], if [you were / [REFERENCE PERSON] was / [SPOUSE-PARTNER] was] to work more hours per week than usual, would [you / he / she] get paid for those extra hours of work?

1. Yes  5. No  → GO TO BC35CKPT

GO TO BC32

BC32. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
EMPLOYER: [EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR])
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 BC35CKPT  GO TO BC32A

(WEB) About how much would [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] make per hour for those extra hours?


GO TO BC35CKPT  GO TO BC32A

BC32A, BC32APER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
EMPLOYER: [EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR])
- SPECIFY amount
- ENTER amount here, then SELECT unit of time on next screen (Hour, Day, Week, Two weeks, Month, Year)

$ 1.00 – 9,999,997.00  DK/RF  → GO TO BC35CKPT

↓

- The amount entered is: [BC32A] per _____
- SELECT the unit of time below

7. Other-specify (BC32APER.SPEC. Specify. (String 100))

GO TO BC35CKPT

(WEB) What is that amount?

$ 1.00 – 9,999,997.00  per
CHECK: Please enter a number from 1.00 to 9999997.00.

7. Other - Please specify: (BC32APER.SPEC)

SIGNAL: Please select a unit of time.

GO TO BC35CKPT
CMJ: BC29=3. Hourly or 4. Hourly + tips or Hourly + commission

BC33. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
EMPLOYER: [EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR])
What is [your / his / her] hourly wage rate for [your / his / her] regular work time?
- PER hour

$1.00 – 997.00

(CATI) What is [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] hourly wage rate for [your / his / her] regular work time at [[EMPLOYER] / Employer [1-10]]?

$1.00 – 997.00

CHECK: Please enter a number from 1.00 to 997.00.

CMJ: BC29=3. Hourly or 4. Hourly + tips or Hourly + commission

BC34. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
EMPLOYER: [EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR])
What is [your / his / her] hourly wage rate for overtime?
- ENTER all that apply
- ENTER Refusal [Ctrl-R] for “does not work overtime”, “does not get overtime pay”
- If R says “Straight time”, PROBE: Do you mean [you are / he is / she is] paid the same rate for overtime as for regular hours?
- If R says “Comp time” or “compensation time”, PROBE: Do you mean [you receive / he receives / she receives] additional time off instead of overtime pay?

7. Other-specify (BC34SPEC. Specify other overtime wage rate. (String 100))

GO TO BC34A

GO TO BC35CKPT

(CATI) What is [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] hourly wage rate for overtime at [[EMPLOYER] / Employer [1-10]]?

Please select all that apply.


7. Other - Please specify: (BC34SPEC) NA GO TO BC34A

GO TO BC35CKPT

BC34A, BC34APER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
EMPLOYER: [EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR])
- SPECIFY overtime exact amount
- ENTER amount here, then SELECT unit of time on next screen (Hour, Day, Week, Two weeks, Month, Year)

$1.00 – 9999997.00 DK/RF → GO TO BC35CKPT

↓

- The amount entered is: [BC34A] per ______
- SELECT the unit of time below


7. Other - Please specify: (BC34APERSPEC. Specify. (String 100))

(WE) What is that overtime amount?

$1.00 – 9999997.00 per 1. Hour 2. Day 3. Week 4. Two weeks 5. Month 6. Year

7. Other - Please specify: (BC34APERSPEC)

CHECK: Please enter a number from 1.00 to 9999997.00.

SIGNAL: Please select a unit of time.
CMJ: BC29=2, 4 or 6 Tips and Commissions

BC35CKPT. CAI Checkpoint: Whether Receives Tips or Commissions

<table>
<thead>
<tr>
<th>1. Tips (BC29=4)</th>
<th>2. Commissions (BC29=2, 6)</th>
<th>5. All Others → GO TO BC39ACKPT</th>
</tr>
</thead>
</table>

GO TO BC37

BC36, BC36PER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
EMPLOYER: [EMPLOYER] [(SMONTH/SYEAR) – [EMONTH/EYEAR)]
How much are [your / his / her] tips, on average?
- ENTER amount here, then SELECT unit of time on next screen (Hour, Day, Week, Two weeks, Month, Year)

$1.00 – 99,997.00 DK/RF → GO TO BC39ACKPT

The amount entered is: [BC36] per _____
- SELECT the unit of time below

7. Other - specify (BC36PERSPEC. Specify. (String 100))

GO TO BC39ACKPT

(WEB) How much are [your / REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s tips on average at [[EMPLOYER] / Employer [1-10]]?

$1.00 – 99,997.00 Per

CHECK: Please enter a number from 1.00 to 99997.00.

7. Other - Please specify: (BC36PERSPEC)

SIGNAL: Please select a unit of time.

GO TO BC39ACKPT

BC37, BC37PER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
EMPLOYER: [EMPLOYER] [(SMONTH/SYEAR) – [EMONTH/EYEAR)]
How much is [your / his / her] commission on average?
- ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)

$1 – 9,999,997.00 DK/RF → GO TO BC39ACKPT

The amount entered is: [BC37] per _____
- SELECT the unit of time below

7. Other - specify (BC37ERSPEC. Specify. (String 100))

(WEB) How much is [your / REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s commission on average at [[EMPLOYER] / Employer [1-10]]?

$1 – 9,999,997.000 per

CHECK: Please enter a number from 1 to 9999997.

7. Other - Please specify: (BC37ERSPEC)

SIGNAL: Please select a unit of time.
**BC39ACKPT. CAI Checkpoint: Number of Current Jobs**

1. One Current Job (BCCUR=1 For Just One Job) → GO TO BC39B

**CMJ: Hours per Week Worked**

**BC39A. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

On average, how many hours a week do you / does [REFERENCE PERSON] / does [SPOUSE-PARTNER]] currently work on this job?

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

1 – 112

(WEB) On average, how many hours per week [do you / does [REFERENCE PERSON] / does [SPOUSE-PARTNER]] currently work on this job at [[EMPLOYER] / Employer [1-10]]?

1 – 112

Number of hours per week

CHECK: Please enter a number from 1 to 112.

**BC39B. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]


1. Employer decides
2. Worker decides
3. Employer and worker decide together
7. Other-specify (BC39BSPEC. Specify (String 100))


1. [Your/ his / her] employer decides
2. [ You decide / [REFERENCE PERSON] decides / [SPOUSE-PARTNER] decides]
3. [You / He / She] and [your / his / her] employer decide together
7. Other - Please specify: (BC39BSPEC)

**BC39C. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

EMPLOYER: [EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR])

On average, how far in advance [do you / does [REFERENCE PERSON] / does [SPOUSE-PARTNER]] know [your / his / her] work schedule?

- READ list
1. One day or less
2. 2-6 days
3. 1 week
4. 2 weeks
5. 3 weeks
6. 4 or more weeks
7. Work a fixed schedule

(WEF) On average, how far in advance [do you / does [REFERENCE PERSON] / does [SPOUSE-PARNTER]] know [your / his / her] work schedule?

1. One day or less
2. 2-6 days
3. 1 week
4. 2 weeks
5. 3 weeks
6. 4 or more weeks
7. Work a fixed schedule

BC39D. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
EMPLOYER: [EMPLOYER] ([SMONTHER/SYEAR] – [EMONTH/EYEAR])
[Do you / Does he / Does she] usually work a daytime schedule or some other schedule?
- IF necessary: By daytime, I mean a schedule in which most work is done between the hours of 6 a.m. and 6 p.m.

1. Daytime → GO TO BC40CKPT 2. Some other schedule

BC39E. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
EMPLOYER: [EMPLOYER] ([SMONTHER/SYEAR] – [EMONTH/EYEAR])
What hours [do you / does [REFERENCE PERSON] / does [SPOUSE-PARNTER]] usually work?
- IF necessary: [Do you / Does [REFERENCE PERSON] / Does [SPOUSE-PARNTER]] usually work evenings, nights, a rotating shift, a split shift, an irregular schedule, or some other shift?

1. An evening shift (2 p.m. – midnight)
2. A night shift (9 p.m. – 8 a.m.)
3. A rotating shift (sometimes days, evenings, or nights)
4. A split shift (two distinct periods a day)
5. An irregular schedule
6. Some other shift

(WEF) What hours [do you / does [REFERENCE PERSON] / does [SPOUSE-PARNTER]] usually work?
1. An evening shift (2 p.m. – midnight)
2. A night shift (9 p.m. – 8 a.m.)
3. A rotating shift (sometimes days, evenings, or nights)
4. A split shift (two distinct periods a day)
5. An irregular schedule
6. Some other shift

BC40CKPT. CAI Checkpoint: Whether Eligible for Dependent Interviewing

1. Eligible: CMJ Same as Preloaded CMJ & Preloaded BCDE22=Someone Else Only & Preloaded BCDE41 Valid
   (CMJ & REINT & SAME CMJ & SAME RP (SP) & NEWPRELOAD.BCDE22=1 & NEWPRELOAD.BCDE41=Response)

2. Ineligible: CMJ Not Same as Preloaded CMJ & Preloaded BCDE22=Someone Else Only
   (CMJ & REINT & SAME RP (SP) & BC22=1 - But Not Same CMJ)

3. Ineligible: CMJ Same as Preloaded CMJ & Preloaded BCDE22=Someone Else Only & Preloaded BCDE41 Not Valid
   (CMJ & REINT & SAME CMJ & SAME RP (SP) & NEWPRELOAD.BCDE22=1 & BUT NEWPRELOAD.BCDE41 <>Response)

4. Ineligible: CMJ Same as Preloaded CMJ & Preloaded BCDE22=Someone Else Only but Preloaded BCDE41 Not Valid; or Preloaded BCDE22<>Someone Else Only & BC22=Someone Else Only; or Different RP (SP) & BC22= Someone Else Only; or Not Reinterview & BC22= Someone Else Only
   (a. CMJ & REINT & SAME CMJ & SAME RP (SP) & NEWPRELOAD.BCDE22=1 - But NEWPRELOAD.BCDE41 <>Response
   b. CMJ & REINT & SAME CMJ & SAME RP (SP) & BC22=1 - But NEWPRELOAD.BCDE22 <>1
   c. CMJ & REINT & BC22=1 - But Not Same RP (SP)
   d. CMJ & BC22=1 - But Not REINT)

5. All Others (BC22<>Someone Else Only)

GO TO BC42CKPT

(Assign BC41 = NEWPRELOAD + 2 Years)
GO TO BC42CKPT

↓
CMJ: BC22=1. Someone Else Only
REINT: CMJ Not Same, or CMJ Ineligible; ALL OTHER IWS: CMJ


YEARS, MONTHS, WEEKS. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

EMPLOYER: [EMPLOYER] [[SMONTH/SYEAR] – [EMONTH/EYEAR]]

How many years’ experience [do you / does [REFERENCE PERSON] / does [SPOUSE-PARTNER]] have altogether with [your / his / her] present employer?
- ENTER as number of Years, Months, and Weeks
- [0] not allowed, PRESS [Enter]
- 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

1 – 65 Years
1 – 12 Months
1 – 52 Weeks

CHECK: You must enter either years, months, or weeks.

(WEB) How much experience [do you / does [REFERENCE PERSON] / does [SPOUSE-PARTNER]] have altogether with [[EMPLOYER] / Employer [1-10]]?

Please enter as a number of years, months, and/or weeks; for "0" please leave the box empty - do not enter "0". For less than one week, please enter “1” for Number of Weeks.

1 – 65 Number of years
1 – 12 Number of months
1 – 52 Number of weeks

CHECK: Please enter a number from 1 to [65 / 12 / 52].

End BC41

BC42CKPT. CAI Checkpoint: Whether Worked Job in PYEAR; Whether PYEAR Weeks or Hours/Week Can Be Computed

<table>
<thead>
<tr>
<th>Worked Job During [PYEAR] (BCWTRP1YEAR=1)</th>
<th>5. All Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>&gt;1 Job (BCDEWTRPYCOUNT&gt;1)</td>
<td>GO TO BC47CKPT</td>
</tr>
</tbody>
</table>

1. Can’t Compute Weeks Worked (BCDEDKJOBSP1YR=1)

2. Can’t Compute Hours/Week (BCDEDKJOBSP1YR=0 & BCDEDKHOURSP1YR=0)

3. Hours/Week Computed (BCDEDKJOBSP1YR=0 & BCDEDKHOURSP1YR=0)

GO TO BC43

GO TO BC43CKPT
PYear Job: BCDEDkJobsP1Yr=1
*BC42A used to calculate ‘total weeks worked’; not included in public use data

BC42A. (CATI) [CYNAMF][CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE][[Respondent]]
EMPLOYER: [EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR])
((And) the job with [EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR]),...
How many weeks out of the year did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] actually work on this job in [PYEAR], not including any time off that you told me about earlier?

1.0 – 52.0 97.0. Every week except what was already reported for vacation, sick, strike, or layoff (SP_0A)

(WEB) How many weeks out of the year did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] actually work at
[[EMPLOYER] / Employer [1-10]] in [PYEAR], not including any time off that you already reported?
There are 52 weeks in a year.

1.0 – 52.0 97.0. Number of weeks
Every week except what was already reported for vacation, sick, strike, or layoff (SP_0A)
CHECK: Please enter a number from 1.0 to 52.0.

BC43CKPT. CAI Checkpoint: Whether PYEAR Hours/Week Can Be Computed

1. Weeks Computed; Can’t Compute Hours/Week
(BCDEDKJOBSP1YR=0 & BCDEDKHOURLSP1YR=1)
2. Can’t Compute Weeks or Hours/Week
(BCDEDKJOBSP1YR=1 & BCDEDKHOURLSP1YR=1)
5. All Others
GO TO BC44CKPT

PYear Job: BCDEDkHoursP1Yr=1

BC43. (CATI) [CYNAMF][CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE][[Respondent]]
EMPLOYER: [EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR])
((And) the job with [EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR]),...
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

(WEB) On average, how many hours per week did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] work at
[[EMPLOYER] / Employer [1-10]] in [PYEAR]?
There are 52 weeks in a year.
A full time job is typically 40 hours a week.

1 – 112 Number of hours per week
CHECK: Please enter a number from 1 to 112.

BC44CKPT. CAI Checkpoint: Whether PYEAR Overtime Can Be Computed

1. Can’t Compute Overtime (BCDEDKOTP1YR=1)
5. All Others
GO TO BC46
BC44. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

EMPLOYER: [EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR])

((And) the job with [EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR])...) 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 BC46

GO TO BC45

(WEB) Did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] work any overtime at [[EMPLOYER] / Employer [1-10]] in [PYEAR] which isn’t included in the hours you already reported?

1. Yes 5. No  → GO TO BC45

GO TO BC45

BC45, BC45PER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

EMPLOYER: [EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR])

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 – 9,997 DK/RF  → GO TO BC46

↓

- The amount entered is: [BC45] per ______
- SELECT the unit of time below

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

7. Other-specify (BC45PERSPEC: Specify. (String 100))

(WEB) How many hours did that overtime amount to in that period during [PYEAR]?

1 – 9,997 per ______

CHECK: Please enter a number from 1 to 9997.

SIGNAL: Please select a unit of time.
**PYear Job**

BC46, BC46PER. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[(Respondent)]

**EMPLOYER**: [EMPLOYER] [(SMMONTH/SYEAR) – (EMMONTH/EYEAR)]

((And) the job with [EMPLOYER] [(SMMONTH/SYEAR) – (EMMONTH/EYEAR)],...)

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)

  $ 1.00 – 9,999,997.00 [DK/RF] → GO TO BC47CKPT

  ↓

- The amount entered is: [BC46] per ______
- SELECT the unit of time below

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

*(WEB)* About how much did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] make at [[EMPLOYER] / Employer [1-10]] in [PYEAR]? $ 1.00 – 9,999,997.00 per

**CHECK**: Please enter a number from 1.00 to 9999997.00.

**SIGNAL**: Please select a unit of time.

---

**BC47CKPT. CAI Checkpoint: Whether Worked Job in P2YEAR; Whether P2YEAR Weeks or Hours/Week Can Be Computed**

<table>
<thead>
<tr>
<th>Worked Job During [P2YEAR] (BCWTRP2YEAR=1)</th>
<th>5. All Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Can’t Compute Weeks Worked (BCDEDKJOBSP2YR=1)</td>
<td>4. One Job</td>
</tr>
</tbody>
</table>

↓

<table>
<thead>
<tr>
<th>Weeks Worked Computed</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Can’t Compute Hours/Week (BCDEDKJOBSP2YR=0 &amp; BCDEDKHOURS2YR=1)</td>
</tr>
<tr>
<td>3. Hours/Week Computed (BCDEDKJOBSP2YR=0 &amp; BCDEDKHOURS2YR=0)</td>
</tr>
</tbody>
</table>

GO TO BC48

P2Year Job: BCDEDkJobsP2Yr=1

BC47A. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[(Respondent)]

**EMPLOYER**: [EMPLOYER] [(SMMONTH/SYEAR) – (EMMONTH/EYEAR)]

((And) the job with [EMPLOYER] [(SMMONTH/SYEAR) – (EMMONTH/EYEAR)],...)

How many weeks out of the year did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] actually work on this job in [P2YEAR]?

1.0 – 52.0 [97.0. Every week except for vacation, sick, strike, or layoff (SP_0A)]

*(WEB)* How many weeks out of the year did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] actually work at [[EMPLOYER] / Employer [1-10]] in [P2YEAR]?

There are 52 weeks in a year.

1.0 – 52.0 [97.0. Every week except for vacation, sick, strike, or layoff (SP_0A)]

**CHECK**: Please enter a number from 1.0 to 52.0.
BC48CKPT. CAI Checkpoint: Whether P2YEAR Hours/Week Can Be Computed

1. Weeks Computed; Can’t Compute Hours/Week (BCDEDKJOBS2YR=0 & BCDEDKHOURSP2YR=1)
2. Can’t Compute Weeks or Hours/Week (BCDEDKJOBS2YR=1 & BCDEDKHOURSP2YR=1)
5. All Others
   GO TO BC19ACKPT

P2Year Job: BCDEDkHoursP2Yr=1

BC48. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
   EMPLOYER: [EMPLOYER] [[SMONTH/SYEAR] – [EMONTH/EYEAR]]
   ((And) the job with [EMPLOYER] [[SMONTH/SYEAR] – [EMONTH/EYEAR]],...)
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

(WEB) On average, how many hours per week did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] work at
   [[EMPLOYER] / Employer [1-10]] in [P2YEAR]? There are 52 weeks in a year.
   A full time job is typically 40 hours a week.
   1 – 112
   Number of hours per week
   CHECK: Please enter a number from 1 to 112.

BC19ACKPT. CAI Checkpoint: Whether Eligible for Dependent Interviewing

1. Eligible: CMJ Same as Preloaded CMJ & Preloaded BCDE22= Someone Else Only & Preloaded BCDE19A Valid (CMJ & REINT & SAME CMJ & SAME RP (SP) & NEWPRELOAD.BCDE22=1 & NEWPRELOAD.BCDE19A= Response)
   (Assign BC19A - BC19PHONE= NEWPRELOAD)
   GO TO BC50CKPT
2. Ineligible: MRMJ Worked PY-CY & BC22=Someone Else Only (MRMJ & REINT & SAME RP (SP) & BC22=1)
3. Ineligible: CMJ Not Same as Preloaded CMJ & BC22=Someone Else Only (CMJ & REINT & SAME RP (SP) & BC22=1 - But Not Same CMJ)
4. Ineligible: CMJ Same as Preloaded CMJ & (Preloaded BCDE22=Someone Else Only but Preloaded BCDE19A Not Valid; or Preloaded BCDE22<>Someone Else Only & BC22=Someone Else Only); or Different RP (SP) & BC22=Someone Else Only; or Not Reinterview & BC22=Someone Else Only (a. CMJ & REINT & SAME CMJ & SAME RP (SP) & NEWPRELOAD.BCDE22=1 - But NEWPRELOAD.BCDE19A<>Response
   b. CMJ & REINT & SAME CMJ & SAME RP (SP) & BC22=1 - But NEWPRELOAD.BCDE22<>1
d. CMJ & REINT & BC22=1 - But Not Same RP (SP)
   e. CMJ & BC22=1 - But Not REINT)
5. All Others
   GO TO BC50CKPT
CMJ or PY-CY MRMJ: BC22=Someone Else Only
REINT: CMJ Not Same, or CMJ Ineligible, or PY-CY MRMJ; ALL OTHER IWS: CMJ, or PY-CY MRMJ

BC19A. (CATI ONLY) [CYANMF] [CYANML] [CYAQRTH] [CYFUHU], Age [AGEIWDATE] [(Respondent)]
EMPLOYER: [EMPLOYER] [(SMONTH/SYEAR) – (EMONTH/EYEAR)]

[REFERENCE PERSON LOOP: We would like to obtain information about characteristics of employers of our study members, such as benefits offered to employees. In order to do this, we need the full address of the place where [you work / [REFERENCE PERSON] works / [SPOUSE-PARTNER] works] for [EMPLOYER]. As you know, the information we collect is confidential, and that includes maintaining confidentiality in collecting information about employers. / SPOUSE-PARTNER LOOP: As we mentioned earlier, we would like to obtain information about employer characteristics, such as benefits offered to employees. In order to do this, we need the full address of the place where [you work / [SPOUSE-PARTNER] works] for [EMPLOYER].]

- If needed: We would use the employer address to collect general information about [your / her employer, such as number of workers or benefits offered to employees.]
- If needed: The information we collect is confidential, and that includes maintaining confidentiality in collecting information about employers.
- If R knows just part of the address, ENTER [1]
- If R knows none of the address, ENTER [Ctrl-D]

1. Continue [DK/RF] → GO TO BC50CKPT

↓

BC19CNTRY (BC19CTRNAME), BC19ADDR1, BC19ADDR2, BC19CITY, BC19STATE (BC19STABB), BC19ZIP, BC19PHONE, BC19PHONEFOR.

(CATI) [CYANMF] [CYANML] [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
EMPLOYER: [EMPLOYER] [(SMONTH/SYEAR) – (EMONTH/EYEAR)]

Country
What is the mailing address?
- Country if different from USA
- ENTER [185 UNITED STATES] for Puerto Rico, U.S. Virgin Islands, Guam, American Samoa or the Northern Mariana Islands

Select V 1 – 193 (Defaults to 185/US)

Address 1
(What is the mailing address?)
- Enter street address here
- Enter PO Box at next screen
- Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 40

Address 2
(What is the mailing address?)
- Enter PO Box here
- If none, PRESS [Enter] to continue
- Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 40

City
(What is the mailing address?)
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 40

State (For COUNTRY=185)
(What is the mailing address?)

Select V 1 – 57 (Assigned 57/FC if Country<>185)
[Zip / Postal] Code
• Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER all [0]'s

String 10

Area Code and Telephone Number
(And) the area code and phone number?
• Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER all [0]'s

String 10 / String 20

(WEB) We would like to obtain information about characteristics of employers of our study members, such as benefits offered to employees. In order to do this, we need the full address of the place where [you work / [REFERENCE PERSON] works / [SPOUSE-PARTNER] works] for [[EMPLOYER] / Employer [1-10]].

What is the mailing address and telephone number?
The employer address would be used to collect general information about employers, such as number of workers or benefits offered to employees.
The information we collect is confidential, and that includes maintaining confidentiality in collecting information about employers.

Country
Select 1 – 193 (Defaults to 185/US)

United States includes Puerto Rico, U.S. Virgin Islands, Guam, American Samoa and the Northern Mariana Islands

Address Line 1
Address Line 2
City
State
[Zip / Postal] Code
Phone Number

BC50CKPT. CAI Checkpoint: Whether Job Ended in P2YEAR-CYEAR

1. Stopped Job P2YEAR or Later
   ((BCCUR=0, or JOBTYPE=MRMJ, or JOBTYPE=Other & BCCUR=0) & PLDCURR<>Denied))

5. All Others → GO TO BC52CKPT

↓

Job Ended P2Year-CYear

BCS1. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
   EMPLOYER: [EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR])
   ((And) the job with [EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR]),...)
   Why did [you / he / she] stop working for [EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR])? Did the company go out of business, [were you / was he / was she] laid off, did [you / he / she] quit, or what?
   String 500

(WEB) Why did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] stop working for [[EMPLOYER] / Employer [1-10]]? Did the company go out of business, [were you / was he / was she] laid off, did [you / he / she] quit, or something else?
   String 500
BC52CKPT. CAI Checkpoint: Whether More Jobs Reported

1. More Jobs → REPEAT BC19CKPT - BC51; Max=10;
   Then GO TO BC70
5. No More Jobs

End BCJOBS

Certifications & Licenses

BC70. (CATI) [Do you / Does [REFERENCE PERSON] / Does [SPOUSE-PARTNER]] have a professional certification or a state or industry license that was obtained or used since [IWTYPE=REINT: our last interview in [P2YEAR] / ALL OTHERS: January 1, [P2YEAR]] or is currently active?

1. Yes 5. No

→ GO TO BC60ACKPT
GO TO BC71

(WEB) [Do you / Does [REFERENCE PERSON] / Does [SPOUSE-PARTNER]] have a professional certification or a state or industry license that was obtained or used since [IWTYPE=REINT: our last interview in [P2YEAR] / ALL OTHERS: January 1, [P2YEAR]] or is currently active?

1. Yes 5. No

→ GO TO BC60ACKPT
GO TO BC71


BC71. (CATI) What is the primary subject or field of study for this certification or license?

String 500

(WEB) What is the primary subject or field of study?

String 500

BC72MO, BC72YR. (CATI) In what month and year did [you / he / she] receive this certification or license?

• SELECT Month or Season (Enter Year at next screen)
• PROBE DK month: Do you know what season it was?

Select


(In what month and year did [you / he / she] receive this certification or license?)
The month entered is: [BC72MO]

• ENTER the year below

1901 – [CYEAR]

(WEB) When did [you / he / she] receive this certification or license?

Select

Month or Season


1901 – [CYEAR] Year

CHECK: Please enter a date before today.
BC73. (CATI) Who issued this certification or license?
- READ list
  1. Federal, state, or local government,
  2. A community college,
  3. A vocational, technical, trade, or business school,
  4. A professional or trade association, or
  5. A business or company?
  7. Other group or organization - Specify (DO NOT READ) (BC73SPEC. Specify (String 100))

(WEB) Who issued this certification or license?
  1. Federal, state, or local government
  2. A community college
  3. A vocational, technical, trade, or business school
  4. A professional or trade association
  5. A business or company
  7. Other group or organization – Please specify: (BC73SPEC (String 100))

BC74. (CATI) Is this certification or license still valid?
  1. Yes
  5. No → GO TO BC76

GO TO BC75

(WEB) Is this certification or license still valid?
  1. Yes
  5. No → GO TO BC76

GO TO BC75

BC75. (CATI) Why [do you / does he / does she] currently hold this certification or license?
- READ list
- IF R gives more than one selection, PROBE: Which of those would you say is the main reason?
  1. To begin a career,
  2. To improve skills or knowledge in a current job,
  3. To advance in a current job,
  4. To change to a different job or career,
  5. It was required by an employer or job,
  6. To start own business,
  7. For personal interest?
  97. Other - Specify: (BC75SPEC (String 100))

(WEB) What is the MAIN reason [you / he / she] currently hold[s] this certification or license?
  1. To begin a career
  2. To improve skills or knowledge in a current job
  3. To advance in a current job
  4. To change to a different job or career
  5. It was required by an employer or job
  6. To start own business
  7. For personal interest
  97. Other – Please specify: (BC75SPEC (String 100))

BC76. (CATI) [Do you / Does [REFERENCE PERSON] / Does [SPOUSE-PARTNER]] have any other certifications or licenses?
  1. Yes → REPEAT BC71 - BC76; Max=5; Then GO TO BC60ACKPT
  5. No → GO TO BC60ACKPT

(WEB) [Do you / Does [REFERENCE PERSON] / Does [SPOUSE-PARTNER]] have any other certifications or licenses?
  1. Yes → REPEAT BC71 - BC76; Max=5; Then GO TO BC60ACKPT
  5. No → GO TO BC60ACKPT

End BC71_BC76
Time Use at Work

BC60ACKPT. CAI Checkpoint: Whether Currently Working

1. Currently Working (BCCUR=1 For Any Job)  5. All Others → GO TO BC10CKPT

BC60A. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
Current Employers:
[List of Current Employers from EHC]
These next questions are about the time [you spend / [REFERENCE PERSON] spends / [SPOUSE-PARTNER] spends] working in a typical week.
In a typical week, how many hours [do you / does he / does she] spend working for pay?
• IF R reports hours other than weekly, PROBE: About how many hours per week would you say that is?
• IF R reports a range, PROBE: Within that range, what is your best estimate?
• ROUND DOWN for fractions less than ½ (0.5)
• ROUND UP for fractions ½ (0.5) or more
0 None
1 – 111 Actual hours
112 112 Hours or more

0 – 112
(WEB) These next questions are about the time [you spend / [REFERENCE PERSON] spends / [SPOUSE-PARTNER] spends] working IN A TYPICAL WEEK. In a typical week, how many hours [do you / does he / does she] spend working for pay?
0 – 112 Hours
CHECK: Please enter a number from 0 to 112.

BC60B. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
Current Employers:
[List of Current Employers from EHC]
While [you are / he is / she is] working, how often [do you / does he / does she] interact with other people, including on the phone, in person, and online? Would you say never, rarely, sometimes, often, or almost always?

BC60C. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
Current Employers:
[List of Current Employers from EHC]
While [you are / he is / she is] working, how often [do you / does he / does she] perform physically demanding activities, for example, those that require strength or physical effort for long periods of time? Would you say never, rarely, sometimes, often, or almost always?
BC60D. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

Current Employers:
[List of Current Employers from EHC]
(While [you are / he is / she is] working,...)

How often [do you / does he / does she] perform mentally demanding activities, for example, analyzing information, learning new material, or solving complex problems?
(Would you say never, rarely, sometimes, often, or almost always?)


BC60E. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

Current Employers:
[List of Current Employers from EHC]
(While [you are / he is / she is] working,...)

How often [do you / does he / does she] feel rushed or pressed for time?
(Would you say never, rarely, sometimes, often, or almost always?)


BC60B-BC60E GRID. (WEB) IN A TYPICAL WEEK, while [you are / he is / she is] working, how often [do you / does [REFERENCE PERSON] / does [SPOUSE-PARTNER]]:

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>BC60B</td>
<td></td>
<td>o</td>
<td>o</td>
<td>o</td>
<td>o</td>
</tr>
<tr>
<td>BC60C</td>
<td></td>
<td>o</td>
<td>o</td>
<td>o</td>
<td>o</td>
</tr>
<tr>
<td>BC60D</td>
<td></td>
<td>o</td>
<td>o</td>
<td>o</td>
<td>o</td>
</tr>
<tr>
<td>BC60E</td>
<td></td>
<td>o</td>
<td>o</td>
<td>o</td>
<td>o</td>
</tr>
</tbody>
</table>

Time Away in PYear

BC10CKPT. CAI Checkpoint: Whether Worked Any Job in PYEAR

1. Worked in PYEAR (BCWTRP1YEAR=1 For Any Job)  
5. All Others (BCWTRP1YEAR=0 For All Jobs)  
GO TO BC7BCKPT
Employer | Time Away Timeline Text Fill
Response | [EMPLOYER]
Not Response | Employer [1 – 10]

<table>
<thead>
<tr>
<th>MonthSeason</th>
<th>Equivalence for Calculations</th>
<th>Timeline Text Fill</th>
<th>Time Away Timeline “X”</th>
</tr>
</thead>
<tbody>
<tr>
<td>22. Spring (Mar-May)</td>
<td>4. April</td>
<td>Spr</td>
<td>March, April, May</td>
</tr>
<tr>
<td>23. Summer (Jun-Aug)</td>
<td>7. July</td>
<td>Sum</td>
<td>June, July, August</td>
</tr>
<tr>
<td>24. Fall (Sep-Nov)</td>
<td>10. October</td>
<td>Fal</td>
<td>September, October, November</td>
</tr>
<tr>
<td>DK, RF, NA</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
</tbody>
</table>

Employers in [PYEAR]

[EMPLOYER] / Employer [1 – 10]

Time Away from Work in [PYEAR]

Someone else was sick
Self was sick
Vacation
On strike
Temporary layoff

AQSNS. AQSNS of Reference Person (Spouse-Partner). Assigned.

BC10A. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
While [you were / [REFERENCE PERSON] was / [SPOUSE-PARTNER] was] employed during [PYEAR], did [you / he /she] miss any work because someone else was sick?

1. Yes 5. No → GO TO BC10B
GO TO BC10AMTH

(WEB) The information you report will be highlighted in the calendar at the top of the screen. The purpose of the calendar is to help you remember what you have reported and will appear on several of the following screens. While [you were / [REFERENCE PERSON] was / [SPOUSE-PARTNER] was] employed during [PYEAR], did [you / he /she] miss any work because SOMEONE ELSE was sick?

1. Yes 5. No → GO TO BC10B
GO TO BC10AMTH
How much work did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] miss in [PYEAR] because someone else was sick?

- **ENTER as number of Months, Weeks, and Days**
- **[0] not allowed, PRESS [Enter]**

| 1 – 12 | Months |
| 1 – 52 | Weeks |
| 1 – 365 | Days |

CHECK: You must enter either months, weeks or days.

CHECK: You cannot enter more than ONE YEAR in total.

(WEB) How much work did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] miss in [PYEAR] because SOMEONE ELSE was sick?

Please enter as a number of months, weeks and/or days; for "0" please leave the box empty - do not enter "0".

| 1 – 12 | Number of months |
| 1 – 52 | Number of weeks |
| 1 – 365 | Number of days |

CHECK: Please enter a number from 1 to [12 / 52 / 365].
CHECK: You cannot enter more than ONE YEAR in total.

SIGNAL for NA: This information is important. Please give us your best estimate.

How much of that time in [PYEAR] was **paid time off**? Would you say all of it, about half, none, or something else?

1. All of it  2. About half of it  3. None of it
7. Something else-specify (BC10APTOSPEC. Specify. (String 100))

(WEB) How much of that time in [PYEAR] was **PAID TIME OFF**?

Reported Time Away in [PYEAR] for Someone Else Sick (READ if needed)

Number of Months: [BC10AMTH]
Number of Weeks: [BC10AWK]
Number of Days: [BC10ADY]

Reported Time Away in [PYEAR] (Someone Else Sick)

Number of Months: [BC10AMTH]
Number of Weeks: [BC10AWK]
Number of Days: [BC10ADY]

1. All of it  2. About half of it  3. None of it  7. Something else - Please specify: (BC10APTOSPEC)
BC10AMOS. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

Reported Time Away in [PYEAR] for Someone Else Sick (READ if needed)
Number of Months: [BC10AMTH]
Number of Weeks: [BC10AWK]
Number of Days: [BC10ADY]
During which months of [PYEAR] was that (when [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] missed work because someone else was sick)?
  • ENTER all that apply
  • PROBE: Any others?
  • Do not include months when [[REFERENCE PERSON] / [SPOUSE-PARTNER]] was not employed

Select All  Clear All
1. January
2. February
3. March
4. April
5. May
6. June
7. July
8. August
9. September
10. October
11. November
12. December

(Web) During which months of [PYEAR] was that when [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] missed work because SOMEONE ELSE was sick?
Number of Months: [BC10AMTH]
Number of Weeks: [BC10AWK]
Number of Days: [BC10ADY]
Please select all that apply.
Do not include months when [you were / [REFERENCE PERSON] was / [SPOUSE-PARTNER] was] not employed.

Select All  Clear All
1. January
2. February
3. March
4. April
5. May
6. June
7. July
8. August
9. September
10. October
11. November
12. December

BC10B. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

While [you were / [REFERENCE PERSON] was / [SPOUSE-PARTNER] was] employed during [PYEAR], did [you / he / she] miss any work because [you were / he was / she was] sick?

1. Yes  5. No  → GO TO BC10C

GO TO BC10BMTH

(Web) While [you were / [REFERENCE PERSON] was / [SPOUSE-PARTNER] was] employed during [PYEAR], did [you / he / she] miss any work because [YOU were / HE was / SHE was] sick?

1. Yes  5. No  → GO TO BC10C

GO TO BC10BMTH
BC10BMTH, BC10BWK, BC10BDY. *(CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] *(Respondent)*

How much work did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] miss in [PYEAR] because [you were / he was / she was] sick?

- ENTER as number of Months, Weeks, and Days
- [0] not allowed, PRESS [Enter]

1 – 12 Months
1 – 52 Weeks
1 – 365 Days

CHECK: You must enter either months, weeks or days.
CHECK: You cannot enter more than ONE YEAR in total.

*(WEB)* How much work did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] miss in [PYEAR] because [YOU were / HE was / SHE was] sick?

Please enter as a number of months, weeks and/or days; for "0" please leave the box empty - do not enter "0".

1 – 12 Number of months
1 – 52 Number of weeks
1 – 365 Number of days

CHECK: Please enter a number from 1 to [12 / 52 / 365].
CHECK: You cannot enter more than ONE YEAR in total.
SIGNAL for NA: This information is important. Please give us your best estimate.

BC10BPTO. *(CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] *(Respondent)*

Reported Time Away in [PYEAR] for Self Sick (READ if needed)
Number of Months: [BC10BMTH]
Number of Weeks: [BC10BWK]
Number of Days: [BC10BDY]

How much of that time in [PYEAR] was paid time off? Would you say all of it, about half, none, or something else?

1. All of it 2. About half of it 3. None of it
7. Something else-specify (BC10BPTOSPEC. Specify. (String 100))

*(WEB)* Reported Time Away in [PYEAR] (Self Sick)
Number of Months: [BC10BMTH]
Number of Weeks: [BC10BWK]
Number of Days: [BC10BDY]

How much of that time in [PYEAR] was PAID TIME OFF?

1. All of it 2. About half of it 3. None of it 7. Something else - Please specify: (BC10BPTOSPEC)
BC10BMOS. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

Reported Time Away in [PYEAR] for Self Sick (READ if needed)
Number of Months: [BC10BMTH]
Number of Weeks: [BC10BWK]
Number of Days: [BC10BDY]

During which months of [PYEAR] was that (when [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] missed work because [you were / he was / she was] sick)?
• ENTER all that apply
• PROBE: Any others?
• Do not include months when [[REFERENCE PERSON] / [SPOUSE-PARTNER]] was not employed

<table>
<thead>
<tr>
<th>Select All</th>
<th>Clear All</th>
</tr>
</thead>
</table>

(WEB) Reported Time Away in [PYEAR] (Self Sick)
Number of Months: [BC10BMTH]
Number of Weeks: [BC10BWK]
Number of Days: [BC10BDY]

During which months of [PYEAR] was that when [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] missed work because [YOU were / HE was / SHE was] sick?
Please select all that apply.
Do not include months when [you were / [REFERENCE PERSON] was / [SPOUSE-PARTNER] was] not employed.

<table>
<thead>
<tr>
<th>Select All</th>
<th>Clear All</th>
</tr>
</thead>
</table>

BC10C. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

While [you were / [REFERENCE PERSON] was / [SPOUSE-PARTNER] was] employed during [PYEAR], did [you / he / she] miss any work for a vacation or time off?

1. Yes 5. No → GO TO BC10D

GO TO BC10CMTH

(WEB) While [you were / [REFERENCE PERSON] was / [SPOUSE-PARTNER] was] employed during [PYEAR], did [you / he / she] miss any work for a vacation or time off?

1. Yes 5. No → GO TO BC10D

GO TO BC10CMTH
BC10CMTH, BC10CWK, BC10CDY. *(CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] ([Respondent])

How much work did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] miss in [PYEAR] for a vacation or time off?
- ENTER as number of Months, Weeks, and Days
- [0] not allowed, PRESS [Enter]

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1 – 12</td>
<td>Months</td>
</tr>
<tr>
<td>1 – 52</td>
<td>Weeks</td>
</tr>
<tr>
<td>1 – 365</td>
<td>Days</td>
</tr>
</tbody>
</table>

CHECK: You must enter either months, weeks or days.
CHECK: You cannot enter more than ONE YEAR in total.

(WEB) How much work did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] miss in [PYEAR] for a vacation or time off?
*Please enter as a number of months, weeks and/or days; for "0" please leave the box empty - do not enter "0".*

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1 – 12</td>
<td>Number of months</td>
</tr>
<tr>
<td>1 – 52</td>
<td>Number of weeks</td>
</tr>
<tr>
<td>1 – 365</td>
<td>Number of days</td>
</tr>
</tbody>
</table>

CHECK: Please enter a number from 1 to [12 / 52 / 365].
CHECK: You cannot enter more than ONE YEAR in total.
*SIGNAL for NA: This information is important. Please give us your best estimate.*

BC10CPTO. *(CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] ([Respondent])

Reported Time Away in [PYEAR] for Vacation (READ if needed)

Number of Months: [BC10CMTH]
Number of Weeks: [BC10CWK]
Number of Days: [BC10CDY]

How much of that time in [PYEAR] was paid time off? Would you say all of it, about half, none, or something else?

1. All of it  2. About half of it  3. None of it

7. Something else-specify (BC10CPTOSPEC. Specify. (String 100))

(WEB) Reported Time Away in [PYEAR] (Vacation)

Number of Months: [BC10CMTH]
Number of Weeks: [BC10CWK]
Number of Days: [BC10CDY]

How much of that time in [PYEAR] was PAID TIME OFF?

1. All of it  2. About half of it  3. None of it  7. Something else - Please specify: (BC10CPTOSPEC)
BC10CMOS. *(CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

**Reported Time Away in [PYEAR] for Vacation (READ if needed)**

Number of Months: [BC10CMTH]
Number of Weeks: [BC10CWK]
Number of Days: [BC10CDY]

During which months of [PYEAR] was that (when [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] missed work for a vacation or time off)?
- ENTER all that apply
- PROBE: Any others?
- Do not include months when [[REFERENCE PERSON] / [SPOUSE-PARTNER]] was not employed

<table>
<thead>
<tr>
<th>Select All</th>
<th>Clear All</th>
</tr>
</thead>
</table>

*(WEB) Reported Time Away in [PYEAR] (Vacation)*

Number of Months: [BC10CMTH]
Number of Weeks: [BC10CWK]
Number of Days: [BC10CDY]

During which months of [PYEAR] was that when [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] missed work for a vacation or time off?
*Please select all that apply.*
*Do not include months when [you were / [REFERENCE PERSON] was / [SPOUSE-PARTNER] was] not employed.*

<table>
<thead>
<tr>
<th>Select All</th>
<th>Clear All</th>
</tr>
</thead>
</table>

BC10D. *(CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

While [you were / [REFERENCE PERSON] was / [SPOUSE-PARTNER] was] employed during [PYEAR], did [you / he / she] miss any work because [you were / he was / she was] on strike?

| 1. Yes | 5. No | → GO TO BC10E |

GO TO BC10DMTH

*(WEB)* While [you were / [REFERENCE PERSON] was / [SPOUSE-PARTNER] was] employed during [PYEAR], did [you / he / she] miss any work because [you were / he was / she was] on strike?

| 1. Yes | 5. No | → GO TO BC10E |

GO TO BC10DMTH
BC10DMTH, BC10DWK, BC10DDY. *(CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] *(Respondent)*

How much work did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] miss in [PYEAR] because [you were / he was / she was] on strike?

- ENTER as number of Months, Weeks, and Days
- [0] not allowed, PRESS [Enter]

<table>
<thead>
<tr>
<th>1 – 12</th>
<th>Months</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 – 52</td>
<td>Weeks</td>
</tr>
<tr>
<td>1 – 365</td>
<td>Days</td>
</tr>
</tbody>
</table>

**CHECK:** You must enter either months, weeks or days.
**CHECK:** You cannot enter more than ONE YEAR in total.

*(WEB)* How much work did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] miss in [PYEAR] because [you were / he was / she was] on strike?

*Please enter as a number of months, weeks and/or days; for "0" please leave the box empty - do not enter "0".*

<table>
<thead>
<tr>
<th>1 – 12</th>
<th>Number of months</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 – 52</td>
<td>Number of weeks</td>
</tr>
<tr>
<td>1 – 365</td>
<td>Number of days</td>
</tr>
</tbody>
</table>

**CHECK:** Please enter a number from 1 to [12 / 52 / 365].
**CHECK:** You cannot enter more than ONE YEAR in total.
**SIGNAL for NA:** This information is important. Please give us your best estimate.

BC10DMOS. *(CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] *(Respondent)*

**Reported Time Away in [PYEAR] for On Strike (READ if needed)**

**Number of Months:** [BC10DMTH]
**Number of Weeks:** [BC10DWK]
**Number of Days:** [BC10DDY]

During which months of [PYEAR] was that when [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] missed work because [you were / he was / she was] on strike?

- ENTER all that apply
- PROBE: Any others?
- Do not include months when [[REFERENCE PERSON] / [SPOUSE-PARTNER]] was not employed

**Select All**  **Clear All**

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

*(WEB)* **Reported Time Away in [PYEAR] (On Strike)**

**Number of Months:** [BC10DMTH]
**Number of Weeks:** [BC10DWK]
**Number of Days:** [BC10DDY]

During which months of [PYEAR] was that when [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] missed work because [you were / he was / she was] on strike?

**Please select all that apply.**
**Do not include months when [you were / [REFERENCE PERSON] was / [SPOUSE-PARTNER] was] not employed**

**Select All**  **Clear All**

|------------|-------------|----------|----------|--------|---------|
BC10E. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

While [you were / [REFERENCE PERSON] was / [SPOUSE-PARTNER] was] employed during [PYEAR], did [you / he / she] miss any work because [you were / he was / she was] temporarily laid off from work?

1. Yes  5. No → GO TO BC7BCKPT

GO TO BC10EMTH

(WEB) While [you were / [REFERENCE PERSON] was / [SPOUSE-PARTNER] was] employed during [PYEAR], did [you / he / she] miss any work because [you were / he was / she was] temporarily laid off from work?

1. Yes  5. No → GO TO BC7BCKPT

GO TO BC10EMTH

BC10EMTH, BC10EWK, BC10EDY. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

How much work did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] miss in [PYEAR] because [you were / he was / she was] temporarily laid off from work?

- ENTER as number of Months, Weeks, and Days
- [0] not allowed, PRESS [Enter]

1 – 12 Months
1 – 52 Weeks
1 – 365 Days

CHECK: You must enter either months, weeks or days.
CHECK: You cannot enter more than ONE YEAR in total.

(WEB) How much work did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] miss in [PYEAR] because [you were / he was / she was] temporarily laid off from work?

Please enter as a number of months, weeks and/or days; for "0" please leave the box empty - do not enter "0".

1 – 12 Number of months
1 – 52 Number of weeks
1 – 365 Number of days

CHECK: Please enter a number from 1 to [12 / 52 / 365].
CHECK: You cannot enter more than ONE YEAR in total.
SIGNAL for NA: This information is important. Please give us your best estimate.
Reported Time Away in [PYEAR] for Temporary Layoff (READ if needed)

Number of Months: [BC10EMTH]
Number of Weeks: [BC10EWK]
Number of Days: [BC10EDY]

During which months of [PYEAR] was that (when [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] missed work because [you were / he was / she was] temporarily laid off from work)?

- ENTER all that apply
- PROBE: Any others?
- Do not include months when [[REFERENCE PERSON] / [SPOUSE-PARTNER]] was not employed

Select All   Clear All


(WEB) Reported Time Away in [PYEAR] (Temporary Layoff)

Number of Months: [BC10EMTH]
Number of Weeks: [BC10EWK]
Number of Days: [BC10EDY]

During which months of [PYEAR] was that when [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] missed work because [you were / he was / she was] temporarily laid off from work?

Please select all that apply.

Do not include months when [you were / [REFERENCE PERSON] was / [SPOUSE-PARTNER] was] not
employed.

Select All   Clear All


End TIMEAWAY

Not Working in P2Year

AQSNS. AQSNS of Reference Person (Spouse-Partner). Assigned.

BC7BCKPT. CAI Checkpoint: Number of Weeks Worked in P2YEAR

1. None or Part of Year (P2YTOTWKS=0-51, 99)  5. Entire Year (P2YTOTWKS=52)  → GO TO BC7DCKPT

↓
Next are questions about times during \([P2YEAR]\) in which \([\text{you were / [REFERENCE PERSON] was / [SPOUSE-PARTNER] was}]\) not employed, that is, not working at all for pay.

\([P2YTOTWKS=0]:\) Some people continue to look for a job, even if they are retired or otherwise not employed. Although \([\text{you were / [REFERENCE PERSON] was / [SPOUSE-PARTNER] was}]\) not employed in \([P2YEAR]\), were
\([P2YTOTWKS<>0]:\) Were there any times during \([P2YEAR]\) when \([\text{you were / he was / she was}]\) not employed and \([\text{you were / he was / she was}]\) looking for a job?

- 'Not employed' means not working for pay

\[1. \text{Yes} \quad 5. \text{No}\] \rightarrow \text{GO TO BC7DCKPT}

\(\text{WEB}\) Next are questions about times during \([P2YEAR]\) in which \([\text{you were / [REFERENCE PERSON] was / [SPOUSE-PARTNER] was}]\) NOT employed, that is, not working at all for pay.

\([P2YTOTWKS=0]:\) Some people continue to look for a job, even if they are retired or otherwise not employed. Although \([\text{you were / [REFERENCE PERSON] was / [SPOUSE-PARTNER] was}]\) not employed in \([P2YEAR]\), were
\([P2YTOTWKS<>0]:\) Were there any times during \([P2YEAR]\) when \([\text{you were / he was / she was}]\) NOT employed and \([\text{you were / he was / she was}]\) looking for a job?

Not employed' means not working for pay.

\[1. \text{Yes} \quad 5. \text{No}\] \rightarrow \text{GO TO BC7DCKPT}

\(\text{BC7BMTH, BC7BWK, BC7BDY. \(\text{(CATI)}\)}\)

\([\text{CYNAMF}] \ [\text{CYNAML}] \ [\text{CYAQRTH}] \ [\text{CYFUHU}] \ [\text{Age [AGEIWDATE]}] \ [\text{[Respondent]}]\)

How long \([\text{were you / was [REFERENCE PERSON] / was [SPOUSE-PARTNER]}]\) NOT employed and looking (for a job in \([P2YEAR]\))?

- ENTER as number of Months, Weeks, and Days
- [0] not allowed, PRESS [Enter]

\begin{tabular}{ll}
1 – 12 & Months \\
1 – 52 & Weeks \\
1 – 365 & Days \\
\end{tabular}

\(\text{CHECK:} \) You must enter either months, weeks or days.

\(\text{CHECK:} \) You cannot enter more than ONE YEAR in total.

\(\text{(WEB)}\) How long \([\text{were you / was [REFERENCE PERSON] / was [SPOUSE-PARTNER]}]\) NOT employed and looking for a job in \([P2YEAR]\)?

Please enter as a number of months, weeks and/or days; for "0" please leave the box empty - do not enter "0".

\begin{tabular}{ll}
1 – 12 & Number of months \\
1 – 52 & Number of weeks \\
1 – 365 & Number of days \\
\end{tabular}

\(\text{CHECK:} \) Please enter a number from 1 to \([12 / 52 / 365]\).

\(\text{CHECK:} \) You cannot enter more than ONE YEAR in total.

\(\text{SIGNAL for NA:} \) This information is important. Please give us your best estimate.
BC7BMOS. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

Reported Time Not Employed and Looking for a Job in [P2YEAR] (READ if needed)

Number of Months: [BC7BMTH]
Number of Weeks: [BC7BWK]
Number of Days: [BC7BDY]

During which months of [P2YEAR] was that when [you were / [REFERENCE PERSON] was / [SPOUSE-PARTNER] was] not employed and looking for a job?

- ENTER all that apply
- PROBE: Any others?

Select All Clear All


(WEB) Report Time Not Employed and Looking for a Job in [P2YEAR]

Number of Months: [BC7BMTH]
Number of Weeks: [BC7BWK]
Number of Days: [BC7BDY]

During which months of [P2YEAR] was that when [you were / [REFERENCE PERSON] was / [SPOUSE-PARTNER] was] NOT employed and LOOKING for a job?

Please select all that apply.

Select All Clear All


Not Working in PYEAR

BC7DCKPT. CAI Checkpoint: Number of Weeks Worked in PYEAR

1. None or Part of Year (PYTOTWKS=0-51, 99) 5. Entire Year (PYTOTWKS=52) → GO TO BC61CKPT

BC7D. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

Next are questions about times during [PYEAR] in which [you were / [REFERENCE PERSON] was / [SPOUSE-PARTNER] was] not employed, that is, not working at all for pay.

[PYTOTWKS=0 & PY2TOTWKS<>0]: Some people continue to look for a job, even if they are retired or otherwise not employed. [PYTOTWKS=0]: Although [you were / [REFERENCE PERSON] was / [SPOUSE-PARTNER] was] not employed in [PYEAR], were / PYTOTWKS<>0: Were there any times during [PYEAR] when [you were / he was / she was] not employed and [you were / he was / she was] looking for a job?

- ‘Not employed’ means not working for pay

1. Yes 5. No → GO TO BC61CKPT

GO TO BC7DMTH

(WEB) Next are questions about times during [PYEAR] in which [you were / [REFERENCE PERSON] was / [SPOUSE-PARTNER] was] NOT employed, that is, not working at all for pay.

[PYTOTWKS=0 & PY2TOTWKS<>0]: Some people continue to look for a job, even if they are retired or otherwise not employed. [PYTOTWKS=0]: Although [you were / [REFERENCE PERSON] was / [SPOUSE-PARTNER] was] not employed in [PYEAR], were / PYTOTWKS<>0: Were there any times during [PYEAR] when [you were / he was / she was] NOT employed and [you were / he was / she was] LOOKING FOR A JOB?

‘Not employed’ means not working for pay.

1. Yes 5. No → GO TO BC61CKPT

GO TO BC7DMTH
**BC7DMTH, BC7DWK, BC7DDY. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]**

How long were you / was [REFERENCE PERSON] / was [SPOUSE-PARTNER] not employed and looking for a job in [PYEAR]?

- ENTER as number of Months, Weeks, and Days
- [0] not allowed, PRESS [Enter]

<table>
<thead>
<tr>
<th></th>
<th>Months</th>
<th>Weeks</th>
<th>Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>1–12</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1–52</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1–365</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*CHECK:* You must enter either months, weeks or days.  
*CHECK:* You cannot enter more than ONE YEAR in total.

(WEB) How long were you / was [REFERENCE PERSON] / was [SPOUSE-PARTNER] NOT employed and LOOKING for a job in [PYEAR]?

Please enter as a number of months, weeks and/or days; for "0" please leave the box empty - do not enter "0".

<table>
<thead>
<tr>
<th></th>
<th>Number of months</th>
<th>Number of weeks</th>
<th>Number of days</th>
</tr>
</thead>
<tbody>
<tr>
<td>1–12</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1–52</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1–365</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*CHECK:* Please enter a number from 1 to [12 / 52 / 365].  
*CHECK:* You cannot enter more than ONE YEAR in total.  
*SIGNAL* for NA: This information is important. Please give us your best estimate.

**BC7DMOS. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]**

Reported Time Not Employed and Looking for a Job in [P2YEAR] (READ if needed)

Number of Months: [BC7BMTH]
Number of Weeks: [BC7BWK]
Number of Days: [BC7BDY]

During which months of [PYEAR] was that when you were / [REFERENCE PERSON] was / [SPOUSE-PARTNER] was not employed and looking for a job?

- ENTER all that apply
- PROBE: Any others?

<table>
<thead>
<tr>
<th>Select All</th>
<th>Clear All</th>
</tr>
</thead>
</table>

(WEB) Reported Time Not Employed and Looking for a Job in [PYEAR]

Number of Months: [BC7DMTH]
Number of Weeks: [BC7DWK]
Number of Days: [BC7DDY]

During which months of [PYEAR] was that when you were / [REFERENCE PERSON] was / [SPOUSE-PARTNER] was NOT employed and LOOKING for a job?

Please select all that apply.

<table>
<thead>
<tr>
<th>Select All</th>
<th>Clear All</th>
</tr>
</thead>
</table>

End NOTWORK
**No Work Since P2Year**

*REINT: No Work Since P2Y Ineligible; ALL OTHER IWS: No Work Since P2Y*

**BC61CKPT. CAI Checkpoint: Whether Eligible for Dependent Interviewing**

<table>
<thead>
<tr>
<th>No Work Since P2YEAR (BCWTRWRK=0)</th>
<th>5. Worked Since P2YEAR (BCWTRWRK=1)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Eligible: Preloaded BCDE62=Yes &amp; Preloaded BCDE63 Valid (REINT &amp; NEWPRELOAD.BCDE62 =Yes &amp; NEWPRELOAD.BCDE63=Response)</td>
<td>GO TO BC64</td>
</tr>
<tr>
<td>2. Ineligible: Preloaded BCDE62&lt;&gt;Yes (REINT But NEWPRELOAD.BCDE62&lt;&gt;Yes)</td>
<td></td>
</tr>
<tr>
<td>4. Ineligible: Preloaded BCDE62=Yes &amp; Preloaded BCDE63 Not Valid; or Different RP (SP); or Not Reinterview</td>
<td></td>
</tr>
<tr>
<td>a. REINT &amp; NEWPRELOAD.BCDE62 =Yes - But NEWPRELOAD.BCDE62&lt;&gt;Response</td>
<td></td>
</tr>
<tr>
<td>b. REINT - But Not Same RP (SP)</td>
<td></td>
</tr>
<tr>
<td>c. Not REINT</td>
<td></td>
</tr>
</tbody>
</table>

**(BCWTRWRK=0)**

(Assign BC62 & BC63=NEWPRELOAD)

GO TO BC64

---

**BC62. (CATI)** [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

- [Have you / Has [REFERENCE PERSON] / Has [SPOUSE-PARTNER]] ever done any work for money?
  - 1. Yes  
  - 5. No

GO TO BC63

**(WEB)** [Have you / Has [REFERENCE PERSON] / Has [SPOUSE-PARTNER]] ever done any work for money?

- 1. Yes  
- 5. No

GO TO BC63


**MONTH, YEAR.** (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

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

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

(In what month and year did [you / he / she] last work for money?)

**[MONTH], _____**

- **ENTER Year**
  - 1901 – [P3YEAR]  
  - 9997. Before [P2YEAR] but don’t know exact year (SP_0A)

**(WEB)** In what month and year did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] last work?

*If you do not know the month, please select the season.*

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

| 1901 – [P3YEAR] | Year | 9997. Before [P2YEAR] but don’t know exact year (SP_0A) |

**CHECK:** Please enter a year before [P2YEAR].

End BC63
**Looking for Work**

**BC64. (CATI)**  
[CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [((Respondent)]

[Have you / Has [REFERENCE PERSON] / Has [SPOUSE-PARTNER] been looking for [BCDE1=WORKING, LAID OFF or BCDE3=WORKING NOW: another job / ALL OTHERS: work] during the past four weeks?]

1. Yes  5. No  → GO TO BC68CKPT

GO TO BC65

**WEB**  
[Have you / Has [REFERENCE PERSON] / Has [SPOUSE-PARTNER] been looking for [BCDE1=WORKING, LAID OFF or BCDE3=WORKING NOW: another job / ALL OTHERS: work] during the past four weeks?]

1. Yes  5. No  → GO TO BC68CKPT

GO TO BC65

**BC65. (CATI)**  
[CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [((Respondent)]

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

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

<table>
<thead>
<tr>
<th>1. Checked with public employment agency</th>
<th>2. Checked with private employment agency</th>
</tr>
</thead>
<tbody>
<tr>
<td>3. Checked with current employer directly</td>
<td>4. Checked with other employer directly</td>
</tr>
<tr>
<td>5. Checked with friends or relatives</td>
<td>6. Placed or answered ads</td>
</tr>
<tr>
<td>9. Contacted school/university employment center</td>
<td>10. Checked union/professional registers</td>
</tr>
<tr>
<td>11. Sent out resumes/filled out applications</td>
<td>12. Attended job training programs/courses</td>
</tr>
<tr>
<td>13. Went on job interviews</td>
<td>14. Looked at ads or employers without applying</td>
</tr>
<tr>
<td>15. Used social media, e.g. Facebook, LinkedIn</td>
<td>17. Used online search engines, for example, Indeed.com</td>
</tr>
<tr>
<td>8. Nothing</td>
<td>7. <strong>Other-specify</strong> (BC65SPEC. Specify. (String 100))</td>
</tr>
</tbody>
</table>

**WEB**  
What [have you / has [REFERENCE PERSON] / has [SPOUSE-PARTNER]] been doing the last four weeks to find [another job / work]?  

*Please select all that apply.*

<table>
<thead>
<tr>
<th>1. Checking with public employment agency</th>
<th>2. Checking with private employment agency</th>
</tr>
</thead>
<tbody>
<tr>
<td>3. Checking with current employer directly</td>
<td>4. Checking with other employer directly</td>
</tr>
<tr>
<td>5. Checking with friends or relatives</td>
<td>6. Placing or answering ads</td>
</tr>
<tr>
<td>9. Contacting school or university employment centers</td>
<td>10. Checking union or professional registers</td>
</tr>
<tr>
<td>11. Sending out resumes or filling out applications</td>
<td>12. Attending job training programs or courses</td>
</tr>
<tr>
<td>13. Going on job interviews</td>
<td>14. Looking at ads or employers without applying</td>
</tr>
<tr>
<td>15. Using social media, e.g. Facebook, LinkedIn</td>
<td>17. Using online search engines, for example, Indeed.com</td>
</tr>
<tr>
<td>8. Nothing</td>
<td>7. <strong>Other - Please specify:</strong> (BC65SPEC)</td>
</tr>
</tbody>
</table>

**CHECK:** “Nothing” is not allowed with other responses.
BC65ACKPT. CAI Checkpoint: Methods Used to Look for Work

1. Nothing, or Social Media Only, or Not Response (BC65=8, 15, 17 ONLY, DK, RF, NA) → GO TO BC66CKPT

5. All Others

↓

BC65A. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

Methods Reported
[List of BC65 Selections]
ASK or CONFIRM: When [you / he / she] searched, did [you / he / she] use the Internet (such as sending email or visiting websites)?
• If needed: Did [you / he / she] use the internet for any of the methods you mentioned?
• If needed: We’re talking about the last 4 weeks

1. Yes 5. No → GO TO BC66CKPT

GO TO BC65B

WEB In the last 4 weeks, when [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] searched, did [you / he / she] use the Internet, such as sending email or visiting websites, for ANY of the methods you mentioned?

1. Yes 5. No → GO TO BC66CKPT

GO TO BC65B

BC65B. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

Methods Reported
[List of BC65 Selections]
[Were you / Was he / Was she] required to use the internet, or were other options available (such as visiting, calling, or mailing materials)?
• ENTER [1] if R says the internet was required for some but not others
• If needed: We’re talking about the last 4 weeks

1. Yes, required to use the internet 5. No, other options were available

WEB [Were you / Was [REFERENCE PERSON] / Was [SPOUSE-PARTNER]] REQUIRED to use the internet, or were other options available, such as visiting, calling, or mailing materials?
Please select “Yes” if the internet was required for some methods but not for others

1. Yes, required to use the internet 5. No, other options were available

BC66CKPT. CAI Checkpoint: Whether Currently Working

1. Not Currently Working (BC15CKPT=3, 4, 5) 5. All Others → GO TO BC68CKPT

↓

YEARS, MONTHS, WEEKS. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE]

[(Respondent)]

How long [have you / has he / has she] been looking for work?
- ENTER as number of Years, Months, and Weeks
- [0] not allowed, PRESS [Enter]
- 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

| 1 – 65 | Years |
| 1 – 12 | Months |
| 1 – 52 | Weeks |

CHECK: You must enter either years, months, or weeks.

(WEB) How long [have you / has [REFERENCE PERSON] / has [SPOUSE-PARTNER]] been looking for work?
Please enter as a number of years, months, and/or weeks; for "0" please leave the box empty - do not enter "0".
For less than one week, please enter "1" for Number of Weeks.

| 1 – 65 | Number of years |
| 1 – 12 | Number of months |
| 1 – 52 | Number of weeks |

CHECK: Please enter a number from 1 to [65 / 12 / 52].

End BC67

Not Working & Not Looking for Work

BC68CKPT. CAI Checkpoint: Whether Currently Working; Whether Looking for Work

1. Not Currently Working and Not Looking  5. All Others ➔ GO TO BC END RULE
   (BC15CKPT=3, 4, 5 & BC64<>Yes)
BC68. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[(Respondent)]

What is the main reason [you were / he was / she was] not looking for work during the last four weeks?

- If R gives multiple reasons, PROBE: Which of those would be the main reason?

1. Believe no work available in area that R likes
2. Couldn’t find any work
3. Lack necessary schooling/training
4. Employers think too young
5. Other types of discrimination
6. In school or training
7. Transportation problems
8. Family responsibilities
9. Can’t arrange child care
10. Disability
11. Retired

97. Other-specify (BC68SPEC. *Specify* (String 500))

*(WEB)* What is the MAIN reason [you were / [REFERENCE PERSON] was / [SPOUSE-PARTNER] was] not looking for work during the last four weeks?

1. Believed that no work was available in desired area
2. Couldn’t find any work
3. Lacked the necessary schooling or training
4. Employers thought too young
5. Other types of discrimination
6. Was in school or training
7. Transportation problems
8. Family responsibilities
9. Couldn’t arrange child care
10. Disability
11. Retired

97. Other - *Please specify:* (BC68SPEC)

BC END RULE: Whether Spouse-Partner in FU (CYAQRTH=201-222, CYFUHU=FU, FUMI)

- Spouse-Partner → REPEAT SECTION BC; Then GO TO SECTION F
- No Spouse-Partner → GO TO SECTION F

End SECTION_BC
Section F: Expenditures

F1. (CATI ONLY) Now I have a few questions about housework and food costs. [R=RP, SP, OFUM: For these questions, when I refer to “family”, I mean your family living there with you.]

- ENTER [1] to continue

1. Continue

F1ACKPT. CAI Checkpoint: Whether Single Reference Person or Reference Person + Spouse-Partner in FU

<table>
<thead>
<tr>
<th>1. Male Reference Person + Spouse-Partner</th>
<th>2. Male Reference Person, No Spouse-Partner</th>
</tr>
</thead>
<tbody>
<tr>
<td>((CYAQRTH=101 &amp; CYFUHU=FU, FUMI) AND</td>
<td>((CYAQRTH=101 &amp; CYFUHU=FU, FUMI))</td>
</tr>
<tr>
<td>(CYAQRTH=201-222 &amp; CYFUHU=FU, FUMI))</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>3. Female Reference Person, No Spouse-Partner</th>
<th>4. Female Reference Person + Spouse-Partner</th>
</tr>
</thead>
<tbody>
<tr>
<td>((CYAQRTH=102 &amp; CYFUHU=FU, FUMI))</td>
<td>((CYAQRTH=102 &amp; CYFUHU=FU or FUMI) AND</td>
</tr>
<tr>
<td></td>
<td>(CYAQRTH=202-222 &amp; CYFUHU=FU, FUMI))</td>
</tr>
</tbody>
</table>

Time Use Outside of Work

SECTION_F.F1A_F1K[1..2] [1]=Reference Person, [2]=Spouse-Partner

AQSN. AQSN of Reference Person (Spouse-Partner). Assigned.

F1A. (F2, F3) (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
These next few questions are about how [you spend/ [REFERENCE PERSON] spends / [SPOUSE-PARTNER] spends] [your / his / her] time [CURRENTLY WORKING: when [you are / he is / she is] not working].
In a typical week, how many hours [do you / does he / does she] spend doing housework, for example, cooking, cleaning, and other work around the house?
- IF R report hours other than weekly, PROBE: About how many hours per week would you say that is?
- IF R reports a range, PROBE: Within that range, what is your best estimate?
- ROUND DOWN for fractions less than ½ (0.5)
- ROUND UP for fractions ½ (0.5) or more

| 0 | None |
| 1 – 111 | Actual hours |
| 112 | 112 Hours or more |

0 – 112

F1B. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
(In a typical week, how many hours [do you / does he / does she] spend)
Doing personal care activities, for example, grooming, getting ready for the day, or taking care of [your / his / her] health needs?
- IF R report hours other than weekly, PROBE: About how many hours per week would you say that is?
- IF R reports a range, PROBE: Within that range, what is your best estimate?
- ROUND DOWN for fractions less than ½ (0.5)
- ROUND UP for fractions ½ (0.5) or more

| 0 | None |
| 1 – 111 | Actual hours |
| 112 | 112 Hours or more |

0 – 112
F1C. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEWDATE] [(Respondent)]
(In a typical week, how many hours [do you / does he / does she] spend)
Shopping, for example, buying groceries or clothes, or shopping online?
  • IF R report hours other than weekly, PROBE: About how many hours per week would you say that is?
  • IF R reports a range, PROBE: Within that range, what is your best estimate?
  • ROUND DOWN for fractions less than ½ (0.5)
  • ROUND UP for fractions ½ (0.5) or more
0   None
1 – 111  Actual hours
112  112 Hours or more
0–112

F1D. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEWDATE] [(Respondent)]
(In a typical week, how many hours [do you / does he / does she] spend)
Caring for or looking after children? [CURRENTLY WORKING: Exclude hours providing care if this is [your / his / her] job.]
  • IF R reports 24/7, ENTER [168]
  • IF R report hours other than weekly, PROBE: About how many hours per week would you say that is?
  • IF R reports a range, PROBE: Within that range, what is your best estimate?
  • ROUND DOWN for fractions less than ½ (0.5)
  • ROUND UP for fractions ½ (0.5) or more
0   None
1 – 168  Actual hours
0–168

F1D2. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEWDATE] [(Respondent)]
(In a typical week, how many hours [do you / does he / does she] spend)
Caring for or looking after an adult who needs assistance with daily activities? [CURRENTLY WORKING: Exclude hours providing care if this is [your / his / her] job.]
  • IF R reports 24/7, ENTER [168]
  • IF R report hours other than weekly, PROBE: About how many hours per week would you say that is?
  • IF R reports a range, PROBE: Within that range, what is your best estimate?
  • ROUND DOWN for fractions less than ½ (0.5)
  • ROUND UP for fractions ½ (0.5) or more
0   None
1 – 168  Actual hours
0–168

F1E. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEWDATE] [(Respondent)]
(In a typical week, how many hours [do you / does he / does she] spend)
Volunteering, for example, at religious organizations, schools, hospitals, charities, or community organizations?
  • IF R report hours other than weekly, PROBE: About how many hours per week would you say that is?
  • IF R reports a range, PROBE: Within that range, what is your best estimate?
  • ROUND DOWN for fractions less than ½ (0.5)
  • ROUND UP for fractions ½ (0.5) or more
0   None
1 – 111  Actual hours
112  112 Hours or more
0–112
F1F. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

(In a typical week, how many hours [do you / does he / does she] spend)
Doing educational activities, for example, taking classes, doing homework, or studying for exams? [>1 FU
MEMBER: Exclude time spent helping others with homework.]
  • IF R report hours other than weekly, PROBE: About how many hours per week would you say that is?
  • IF R reports a range, PROBE: Within that range, what is your best estimate?
  • ROUND DOWN for fractions less than ½ (0.5)
  • ROUND UP for fractions ½ (0.5) or more
  0 None
  1 – 111 Actual hours
  112 112 Hours or more
  0 – 112

F1G. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

(In a typical week, how many hours [do you / does he / does she] spend)
Doing leisure activities for enjoyment, for example, watching TV, doing physical activities that [you enjoy/ he enjoys / she enjoys], going online, or spending time with friends?
  • IF R report hours other than weekly, PROBE: About how many hours per week would you say that is?
  • IF R reports a range, PROBE: Within that range, what is your best estimate?
  • ROUND DOWN for fractions less than ½ (0.5)
  • ROUND UP for fractions ½ (0.5) or more
  0 None
  1 – 111 Actual hours
  112 112 Hours or more
  0 – 112

F1A-F1G GRID. (WEB) These next few questions are about how [you spend/ [REFERENCE PERSON] spends / [SPOUSE-PARTNER] spends] [your / his / her] time [CURRENTLY WORKING: when [you are / he is / she is] NOT WORKING].
In a TYPICAL WEEK, how many hours [do you / does he / does she] spend doing each of the following?
Please round to the nearest number of hours.

F1A. HOUSEWORK, for example, cooking, cleaning, and other work around the house. 0 – 112 Hours
F1B. PERSONAL CARE activities, for example, grooming, getting ready for the day, or taking care of your health needs. 0 – 112 Hours
F1C. SHOPPING, for example, buying groceries or clothes, or shopping online. 0 – 112 Hours
F1D. Caring for or looking after CHILDREN. 0 – 168 Hours
F1D2. Caring for or looking after an ADULT who needs assistance with daily activities. 0 – 168 Hours
F1E. VOLUNTEERING, for example, at religious organizations, schools, hospitals, charities, or community organizations. 0 – 112 Hours
F1F. EDUCATIONAL activities, for example, taking classes, doing homework, or studying for exams. Exclude time spent helping others with homework. 0 – 112 Hours
F1G. LEISURE activities for enjoyment, for example, watching TV, doing physical activities that [you enjoy / he enjoys / she enjoys], going online, or spending time with friends. 0 – 112 Hours

CHECK: Please enter a number from 0 to [112 / 168].
F1H. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [Respondent]

Now think about all the activities [you do / he does / she does] in a typical week [CURRENTLY WORKING: outside of work, that is, when [you are / he is / she is] not working].

[Currently working: Outside of work, how / All others: How] often [do you / does he / does she] interact with other people, including on the phone, in person, and online? Would you say never, rarely, sometimes, often, or almost always?

Never  Rarely  Sometimes  Often  Almost Always or Always

F1I. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [Respondent]

[Currently working: Outside of work, how / All others: How] often [do you / does he / does she] perform physically demanding activities, for example, those that require strength or physical effort for long periods of time? Would you say never, rarely, sometimes, often, or almost always?

Never  Rarely  Sometimes  Often  Almost Always or Always

F1J. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [Respondent]

[Currently working: Outside of work, how / All others: How] often [do you / does he / does she] perform mentally demanding activities, for example, analyzing information, learning new material, or solving complex problems?

(Would you say never, rarely, sometimes, often, or almost always?)

Never  Rarely  Sometimes  Often  Almost Always or Always

F1K. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [Respondent]

[Currently working: Outside of work, how / All others: How] often [do you / does he / does she] feel rushed or pressed for time?

(Would you say never, rarely, sometimes, often, or almost always?)

Never  Rarely  Sometimes  Often  Almost Always or Always

F1H-F1K GRID. (WEB) Now think about all the activities [you do / Reference person] does / [Spouse-partner] does in a TYPICAL WEEK [CURRENTLY WORKING: outside of work, that is, when [you are / he is / she is] NOT WORKING]. How often [do you / does he / does she]:


F1H. Interact with other people, including on the phone, in person, and online?

F1I. Perform PHYSICALLY demanding activities, for example, those that require strength or physical effort for long periods of time?

F1J. Perform MENTALLY demanding activities, for example, analyzing information, learning new material, or solving complex problems?

F1K. Feel RUSHED OR PRESSSED FOR TIME?

F1K END RULE: Whether Spouse-partner in FU (CYAQRTH=201-222, CYFUHU=FU, FUMI)

Spouse-partner → REPEAT F1A-F1K; No Spouse-partner
Then GO TO F4CKPT

End F1A_F1K
F4CKPT. CAI Checkpoint: Number of Current FU Members

1. 2+ FU Members (COVERSCREEN.COUNT.FUCOUNT>1)  5. All Others → GO TO F7CKPT

Family Meals

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

0 – 7

(WEB) How many days a week does the family sit down and eat the main meal of the day together?

0 – 7  Number of days

F7CKPT. CAI Checkpoint: Whether Children Age 5-18 in FU in PYEAR

1. Child Age 5-18 (FUP1YEAR.AGEIWDATE=5-18)  5. All Others → GO TO F6CCKPT

Child/Elder Care & Food

F6AB. (CATI) And during [PYEAR], did [1 CHILD: [CYNAMF] [CYNAML] / >1 CHILD: any child in your 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?

- If needed, CLARIFY: This includes meals distributed by schools to virtual and hybrid students; the meals could be eaten in school or outside of school.

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

(WEB) During [PYEAR], did any child in your family between 5 and 18 years old receive free or reduced-cost breakfasts or lunches at school?

This includes meals distributed by schools to virtual and hybrid students; the meals could be eaten in school or outside of school.

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

F6CCKPT. CAI Checkpoint: Whether Children Age 15 or Younger in FU in PYEAR

1. Child Age <16 (FUP1YEAR.AGEIWDATE<16)  5. All Others → GO TO F7B2CKPT
F7, F7PER. (CATI) How much did you [and your 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

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))

(WEB) How much did you [and your family living there] pay for child care in [PYEAR]?

$ 0 → GO TO F7A NA 1 – 999,997 .00 per

CHECK: Please enter a number from 0 to 999997. 3. Week 4. Two weeks 5. Month 6. Year

7. Other - Please specify: (F7PERSPEC)

SIGNAL: Please select a unit of time

F7MO. (CATI) For which months in [PYEAR] was that?

- ENTER all that apply
- PROBE: Any others?

Select All Clear All


(WEB) For which months in [PYEAR] was that? Please select all that apply.

Select All Clear All


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

1. Yes 5. No → GO TO F7B2CKPT

GO TO F7B

(WEB) Was any child enrolled in a day care center or family day care home in [PYEAR]?

1. Yes 5. No → GO TO F7B2CKPT

GO TO F7B

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

1. Yes 5. No → GO TO F7B2CKPT

GO TO F7B1

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

1. Yes 5. No → GO TO F7B2CKPT

GO TO F7B1
F7B1. (CATI) 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

(WEB) 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

F7B2CKPT. CAI Checkpoint: Whether Female Age 16-46 or Children Age 5 or Younger in FU in PYEAR

1. Female Age 16-46 or Child Age <6 (FUP1YEAR.AGEIWDATE=16-46; FUP1YEAR.AGEIWDATE<6)  5. All Others

GO TO F7CCKPT

F7B2. (CATI) And during [PYEAR], did anyone in your family get food through the WIC program?

1. Yes  5. No

(WEB) During [PYEAR], did anyone in your family get food through the Women, Infants, and Children (WIC) nutritional program?

1. Yes  5. No

F7CCKPT. CAI Checkpoint: Whether FU Member Age 61 or Older in FU in PYEAR

1. FU Member Age >60 (FUP1YEAR.AGEIWDATE>60)  5. All Others

GO TO F8

F7C. (CATI) During [PYEAR], did you [or anyone in your family] receive free or reduced-cost meals for the elderly?

1. Yes  5. No

(WEB) During [PYEAR], did you [or anyone in your family] receive free or reduced-cost meals for the elderly?

1. Yes  5. No

Food Stamps

F8. (CATI) Did you [or anyone else in your family] receive food stamp benefits, that is, either food stamps or a food stamp benefit card, at any time in [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

(WEB) Did you [or anyone else in your family] receive food stamp benefits, that is, either food stamps or a food stamp benefit card, at any time in [P2YEAR], two years ago?

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

1. Yes  5. No
F11. (CATI) Did you [or anyone else in your family] receive food stamp benefits, (that is, either food stamps or a food stamp benefit card,) at any time last year, in [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

GO TO F12

(WEB) Did you [or anyone else in your family] receive food stamp benefits, that is, either food stamps or a food stamp benefit card, at any time last year, in [PYEAR]?

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

GO TO F12

F12, F12PER. (CATI) How much did you receive (in food stamp benefits) in [PYEAR]?
  • If needed: Food stamp benefits are issued by SNAP, the federal Supplemental Nutrition Assistance Program, also called Food Stamp Program.
  • ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)

$ 1 – 999,997  DK/RF → GO TO F13

↓

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))

(WEB) How much did you receive in food stamp benefits in [PYEAR]?

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

$ 1 – 999,997 .00 per

CHECK: Please enter a number from 1 to 999997.

7. Other - Please specify: (F12PERSPEC)

SIGNAL: Please select a unit of time

F13. (CATI) During which months was that?
  • ENTER all that apply
  • PROBE: Any others?

Select All  Clear All


(WEB) During which months was that?

Please select all that apply.

Select All  Clear All


F14. (CATI) Did you [or anyone else now living in your family] use 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. Yes 5. No → GO TO F18F22

   GO TO F15

   (WEB) Did you [or anyone else now living in your family] use food stamp benefits last month?
   
   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

   GO TO F15

   F15. (CATI) How many members of your 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.

   1 – 97

   (WEB) How many members of your family were covered by food stamp benefits last month?
   
   Food stamp benefits are issued by SNAP, the federal Supplemental Nutrition Assistance Program, also called Food Stamp Program.

   1 – 97

   Number of family members

   CHECK: Please enter a number from 1 to 97.

   F16. (CATI) How much did you 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

   (WEB) How much did you receive in food stamp benefits last month?
   
   Food stamp benefits are issued by SNAP, the federal Supplemental Nutrition Assistance Program, also called Food Stamp Program.

   $ 1 – 999,997 .00

   CHECK: Please enter a number from 1 to 999997.

   F17. (CATI) In addition to what you buy with food stamp benefits, do you [or anyone else in your family] spend any money on food that you use at home?
   • 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 F19F23

   GO TO F18F22

   (WEB) In addition to what you buy with food stamp benefits, do you [or anyone else in your family] spend any money on food that you use at home?
   
   Food stamp benefits are issued by SNAP, the federal Supplemental Nutrition Assistance Program, also called Food Stamp Program.

   1. Yes 5. No → GO TO F19F23

   GO TO F18F22
Food

F18F22, F18F22PER. (CATI) [F14=YES: How much do you spend on that food in an average week? / ALL OTHERS: How much do you [and everyone else in your family] spend on food that you use at home in an average week?]

- [HU or HUCS in FU: IF R lives with non-FU members, PROBE: Is that only your (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  $ 1.00 – 99,997.00  DK/RF → GO TO F19F23

The amount entered is: [F18F22] per ____

- SELECT the unit of time below

<table>
<thead>
<tr>
<th>3. Week</th>
<th>4. Two weeks</th>
<th>5. Month</th>
<th>6. Year</th>
</tr>
</thead>
</table>

7. Other-specify (F18F22PERSPEC, Specify, (String 100))

(WEB) How much [F14=YES: do you spend on that food / ALL OTHERS: do you [and everyone else in your family] spend on food that you use at home] in an average week?

[HU or HUCS in FU: Please do not include amounts paid by [HU & HUCS: roommates, people living with you temporarily, or family living with you who do their own F.E.S. interview / HU only: roommates or people living with you temporarily / HUCS only: family living with you who do their own F.E.S. interview].]

$ [F17 NOT ASKED: 0.00]  NA  1.00 – 99,997.00 per  3. Week  4. Two weeks  5. Month  6. Year

GO TO F19F23

CHECK: Please enter a number from [0/1.00] to 99997.00.

7. Other - Please specify: (F18F22PERSPEC)

SIGNAL: Please select a unit of time

F19F23. (CATI) Do you have any food delivered to the door which isn’t included in that?

1. Yes  5. No → GO TO F21F25

GO TO F20F24

(WEB) Do you have any food delivered to the door which isn’t included in that?

1. Yes  5. No → GO TO F21F25

GO TO F20F24

F20F24, F20F24PER. (CATI) How much do you spend on that food?

- [HU or HUCS in FU: IF R lives with non-FU members, PROBE: Is that only your (FU’s) share of the food?]
- ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)

$ 1.00 – 99,997.00  DK/RF → GO TO F21F25

↓

The amount entered is: [F20F24] per ____

- SELECT the unit of time below

<table>
<thead>
<tr>
<th>3. Week</th>
<th>4. Two weeks</th>
<th>5. Month</th>
<th>6. Year</th>
</tr>
</thead>
</table>

7. Other-specify (F20F24PERSPEC, Specify, (String 100))

(WEB) How much do you spend on that food?

[HU or HUCS in FU: Please do not include amounts paid by [HU & HUCS: roommates, people living with you temporarily, or family living with you who do their own F.E.S. interview / HU only: roommates or people living with you temporarily / HUCS only: family living with you who do their own F.E.S. interview].]

$ 1.00 – 99,997.00 per  3. Week  4. Two weeks  5. Month  6. Year

CHECK: Please enter a number from 1.00 to 99997.00.

7. Other - Please specify: (F20F24PERSPEC)

SIGNAL: Please select a unit of time
F21F25, F21F25PER. (CATI) About how much do you [and everyone else in your family] spend eating out?
  • [HU or HUCS in FU: IF R lives with non-FU members, PROBE: Is that only your (FU’s) share of the food?]
  • ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)
    $ 0.00 \quad \text{GO TO FOOD1CKPT} \quad \$ 1.00 – 99,997.00 \quad \text{DK/RF} \quad \text{GO TO FOOD1CKPT}
  \downarrow
  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))
  \( \text{(WEB)} \) About how much do you [and everyone else in your family] spend eating out?
  \( \text{[HU or HUCS in FU: Please do not include amounts paid by [HU & HUCS: roommates, people living with you temporarily, or family living with you who do their own F.E.S. interview / HU only: roommates or people living with you temporarily / HUCS only: family living with you who do their own F.E.S. interview].]}
  \$ 0.00 \quad \text{NA} \quad 1.00 – 99,997.00 \quad \text{per}
  \quad \text{GO TO FOOD1CKPT}
  \quad \text{CHECK: Please enter a number from 0 to 99997.00.}
  3. Week 4. Two weeks 5. Month 6. Year
    7. Other - Please specify: (F21F25PERSPEC)
  \text{SIGNAL: Please select a unit of time}

Food Security

FOOD1CKPT. CAI Checkpoint: Who is Respondent

1. R=Proxy (RESPONDENT=7) \quad \text{GO TO F47} \quad 2. R=RP, SP, OFUM (RESPONDENT=1, 2, 3, 4)
  \downarrow

SECTION_F.FOOD

Household Stage 1

FOOD1. (CATI) Now I'm going to read you several statements that people have made about their food situation. For these statements, please tell me whether the statement was often true, sometimes true, or never true for [NO SPOUSE-PARTNER: you / SPOUSE-PARTNER: your household] in the last 12 months - that is, since last CURRMONTH.
The first statement is "[NO SPOUSE-PARTNER: I / SPOUSE-PARTNER: We] worried whether [my / our] food would run out before [I / we] got money to buy more."
Was that often true, sometimes true, or never true for [you / your household] in the last 12 months?
  1. Often true 2. Sometimes true 3. Never true

FOOD2. (CATI) "The food that [I / we] bought just didn't last, and [I / we] didn't have money to get more."
(Was that often, sometimes, or never true for [you / your household] in the last 12 months?)
  1. Often true 2. Sometimes true 3. Never true

FOOD3. (CATI) "[I / We] couldn't afford to eat balanced meals."
(Was that often, sometimes, or never true for [you / your household] in the last 12 months?)
  1. Often true 2. Sometimes true 3. Never true
FOOD1-FOOD3 GRID. (WEB) Below are several statements that people have made about their food situation. For these statements, please tell us whether the statement was often true, sometimes true, or never true for [NO SPOUSE-PARTNER: you / SPOUSE-PARTNER: your household] in the last 12 months, that is, since last [CURRMONTH].

FOOD1. "[NO SPOUSE-PARTNER: I / SPOUSE-PARTNER: We] worried whether [my / our] food would run out before [I / we] got money to buy more."

FOOD2. "The food that [I / we] bought just didn't last, and [I / we] didn't have money to get more."

FOOD3. "[I / We] couldn't afford to eat balanced meals."

1. Often true 2. Sometimes true 3. Never true

Household Stage 2

FOOD4 RULE: Whether Food1, Food2 or Food3 Endorsed As Often/Sometimes

One or More of FOOD1-FOOD3=1, 2 All Others → GO TO FOOD11CKPT

FOOD4. (CATI) In the last 12 months, since last [CURRMONTH], did [NO SPOUSE-PARTNER: you / SPOUSE-PARTNER: you or other adults in your household] ever cut the size of your meals or skip meals because there wasn't enough money for food?

1. Yes 5. No → GO TO FOOD6

GO TO FOOD5

(WEB) In the last 12 months, since last [CURRMONTH], did [NO SPOUSE-PARTNER: you / SPOUSE-PARTNER: you or other adults in your household] ever cut the size of your meals or skip meals because there wasn't enough money for food?

1. Yes 5. No → GO TO FOOD6

GO TO FOOD5

FOOD5. (CATI) How often did this happen - almost every month, some months but not every month, or in only 1 or 2 months?

1. Almost every month 2. Some months but not every month 3. Only 1 or 2 months

(WEB) How often did this happen?

1. Almost every month 2. Some months but not every month 3. Only 1 or 2 months

FOOD6. (CATI) In the last 12 months, (since last [CURRMONTH]), did you ever eat less than you felt you should because there wasn't enough money for food?

1. Yes 5. No

(WEB) In the last 12 months, since last [CURRMONTH], did you ever eat less than you felt you should because there wasn't enough money for food?

1. Yes 5. No
FOOD7. *(CATI)* In the last 12 months, (since last [CURRMONTH]), were you ever hungry but didn’t eat because there wasn’t enough money for food?

1. Yes
5. No

*(WEB)* In the last 12 months, since last [CURRMONTH], were you ever hungry but didn’t eat because there wasn’t enough money for food?

1. Yes
5. No

FOOD8. *(CATI)* In the last 12 months, did you lose weight because there wasn’t enough money for food?

1. Yes
5. No

*(WEB)* In the last 12 months, since last [CURRMONTH], did you lose weight because there wasn’t enough money for food?

1. Yes
5. No

**Household Stage 3**

FOOD9 **RULE:** Whether Food4, Food6, Food7, or Food8 Endorsed

One or More of FOOD4-FOOD8=1  All Others  → GO TO FOOD11CKPT

FOOD9. *(CATI)* In the last 12 months, (since last [CURRMONTH]), did \([NO SPOUSE-PARTNER: you \land SPOUSE-PARTNER: you \lor other adults in your household]\) ever not eat for a whole day because there wasn’t enough money for food?

1. Yes
5. No  → GO TO FOOD11CKPT

**GO TO FOOD10**

*(WEB)* In the last 12 months, since last [CURRMONTH], did \([NO SPOUSE-PARTNER: you \land SPOUSE-PARTNER: you \lor other adults in your household]\) ever not eat for a whole day because there wasn’t enough money for food?

1. Yes
5. No  → GO TO FOOD11CKPT

**GO TO FOOD10**

FOOD10. *(CATI)* How often did this happen - almost every month, some months but not every month, or in only 1 or 2 months?

1. Almost every month
2. Some months but not every month
3. Only 1 or 2 months

*(WEB)* How often did this happen?

1. Almost every month
2. Some months but not every month
3. Only 1 or 2 months

**Child Stage 1**

FOOD11CKPT. CAI Checkpoint: Whether Children Age 0-17 in FU

1. One or More Children in FU
\((CYAQRTH<>101-222, 881-882, 901-922 \land CYFUHU=FU, FUMI \land AGEIWDATE<18)\)
5. All Others  → GO TO F47

↓
FOOD11. (CATI) Now I’m going to read you several statements that people have made about the food situation of their children. For these statements, please tell me whether the statement was often true, sometimes true, or never true in the last 12 months for your [1 CHILD: child / >1 CHILD: children living in the household who are under 18 years old].

"[NO SPOUSE-PARTNER: I / SPOUSE-PARTNER: We] relied on only a few kinds of low-cost food to feed [my / our] [1 CHILD: child / >1 CHILD: children] because [I was / we were] running out of money to buy food."

Was that often, sometimes, or never true for [NO SPOUSE-PARTNER: you / SPOUSE-PARTNER: your household] in the last 12 months, (since last [CURRMOUTH])?

1. Often true  2. Sometimes true  3. Never true

FOOD12. (CATI) "[I / We] couldn’t feed [my / our] [child / children] a balanced meal, because [I / we] couldn’t afford that."

(Was that often, sometimes, or never true for [you / your household] in the last 12 months, (since last [CURRMOUTH])?)

1. Often true  2. Sometimes true  3. Never true

FOOD13. (CATI) "[My / Our] [child was / children were] not eating enough because [I / we] just couldn’t afford enough food."

(Was that often, sometimes, or never true for [you / your household] in the last 12 months, (since last [CURRMOUTH])?)

1. Often true  2. Sometimes true  3. Never true

FOOD11-FOOD13 GRID. (WEB) Below are several statements that people have made about the food situation of their children. For these statements, please tell us whether the statement was often true, sometimes true, or never true for your [1 CHILD: child / >1 CHILD: children living in the household who are under 18 years old] in the last 12 months, since last [CURRMOUTH].

FOOD11. "[NO SPOUSE-PARTNER: I / SPOUSE-PARTNER: We] relied on only a few kinds of low-cost food to feed [my / our] [1 CHILD: child / >1 CHILD: children] because [I was / we were] running out of money to buy food."

FOOD12. "[I / We] couldn’t feed [my / our] [child / children] a balanced meal, because [I / we] couldn’t afford that."

FOOD13. "[My / Our] [child was / children were] not eating enough because [I / we] just couldn’t afford enough food."

1. Often true  2. Sometimes true  3. Never true

Child Stage 2

FOOD14 RULE: Whether Food11, Food12 or Food13 Endorsed As Often/Sometimes

One or More of FOOD11-FOOD13=1, 2  All Others → GO TO F47
FOOD14.  

(CATI) In the last 12 months, since [CURRMONTH] of last year, did you ever cut the size of [1 CHILD: your child’s / >1 CHILD: any of the children’s] meals because there wasn’t enough money for food?

1. Yes  5. No

(WEB) In the last 12 months, since [CURRMONTH] of last year, did you ever cut the size of [1 CHILD: your child’s / >1 CHILD: any of the children’s] meals because there wasn’t enough money for food?

1. Yes  5. No

FOOD15.  

(CATI) In the last 12 months, (since last [CURRMONTH]), did [your child / any of the children] ever skip meals because there wasn’t enough money for food?

1. Yes  5. No → GO TO FOOD17

GO TO FOOD16

(WEB) In the last 12 months, since last [CURRMONTH], did [your child / any of the children] ever skip meals because there wasn’t enough money for food?

1. Yes  5. No → GO TO FOOD17

GO TO FOOD16

FOOD16.  

(CATI) How often did this happen?
(Would you say almost every month, some months but not every month, or in only 1 or 2 months?)

1. Almost every month  2. Some months but not every month  3. Only 1 or 2 months

(WEB) How often did this happen?

1. Almost every month  2. Some months but not every month  3. Only 1 or 2 months

FOOD17.  

(CATI) In the last 12 months, (since last [CURRMONTH]), [was your child / were the children] ever hungry but you just couldn’t afford more food?

1. Yes  5. No

(WEB) In the last 12 months, since last [CURRMONTH], [was your child / were the children] ever hungry but you just couldn’t afford more food?

1. Yes  5. No

FOOD18.  

(CATI) In the last 12 months, (since last [CURRMONTH]), did [your child / the children] ever not eat for a whole day because there wasn’t enough money for food?

1. Yes  5. No

(WEB) In the last 12 months, since last [CURRMONTH], did [your child / the children] ever not eat for a whole day because there wasn’t enough money for food?

1. Yes  5. No

End FOOD
Vehicles

F47. (CATI) These next questions are about personal vehicles and transportation. Do you [or anyone else in your family living there] own or lease a car or other vehicle for personal use?

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

1. Yes 5. No → GO TO F81A

GO TO F48

(WEB) Do you [or anyone else in your family living there] own or lease a car or other vehicle for personal use? This does not include motorcycles. Please do not include motorcycles. Please do not include vehicles used exclusively by family members who are not currently living with you [HU & HUCS in FU:; or roommates or people living with you temporarily, or family living with you who do their own F.E.S. interview / HU only in FU:; or roommates or people living with you temporarily / HUCS only in FU:; or family living with you who do their own F.E.S. interview].

1. Yes 5. No → GO TO F81A

GO TO F48

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

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

1 – 97 DK RF → GO TO F81A

GO TO F49A

(WEB) Altogether, how many vehicles do you [or anyone else in your family living there] own or lease for your personal use? Please do not include motorcycles. Please do not include vehicles used exclusively by family members who are not currently living with you [HU & HUCS in FU:; or roommates or people living with you temporarily, or family living with you who do their own F.E.S. interview / HU only in FU:; or roommates or people living with you temporarily / HUCS only in FU:; or family living with you who do their own F.E.S. interview].

1 – 97 Number of vehicles NA → GO TO F81A

GO TO F49A

SECTION_F.F49SERIES.F49[1..3] [1..3]=Which vehicle

F49A. (CATI) [LOOP 1: I would like to ask a few questions about [F48=1: that vehicle / F48=2-3: those vehicles, starting with the one most recently acquired / F48>3: the 3 vehicles most recently acquired].] What is the year [F48>1-LOOP 1: of the most recently acquired vehicle / F48>1-LOOP 2-3: of the next vehicle]?

- If needed, if R also tells you make and model: Thank you. We’ll talk about the make and model at the next question.

1901 – [NYEAR]

(WEB) [LOOP 1: The next questions are about [F48=1: that vehicle / F48=2-3: those vehicles, starting with the one most recently acquired / F48>3: the 3 vehicles most recently acquired]. What is the year [F48>1-LOOP 1: of the most recently acquired vehicle / F48>1-LOOP 2-3: of the next vehicle]?

1901 – [NYEAR] Year
F49B. *(CATI)* What is the make and model of the vehicle?
- PROBE if multiple models are listed with the same name
- PROBE for hybrid or non-hybrid as needed. If R doesn’t know, SELECT the non-hybrid model

String 50
*(Assign F49B (DESCRIPT), F49B1 (HYBRID) & F49C (MODEL8) from car database)*

*(WEB)* What is the make and model of the vehicle?
Type in the make or model name and select your vehicle from the options presented. If you don’t know the make or model of your vehicle, please type “OTHER” and select from the options presented.

String 50  Make and model
*(Assign F49B (DESCRIPT), F49B1 (HYBRID) & F49C (MODEL8) from car database)*

F49BCKPT. CAI Checkpoint: Whether Vehicle is Hybrid; Whether Vehicle Older Than 1999

<table>
<thead>
<tr>
<th>1. Hybrid <em>(F49B1=1)</em></th>
<th>2. Older Than 1999 <em>(F49A&lt;1999)</em></th>
<th>5. All Others <em>(incl F49A=DK, RF, NA)</em></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>GO TO F53 RULE</td>
<td></td>
</tr>
</tbody>
</table>

F49B2. *(CATI) [F49A F49B]*
Is this vehicle a hybrid, plug-in hybrid, electric-only, or alternative fuel use vehicle, or none of the above?
- If R says Yes, PROBE: Is it a hybrid, plug-in hybrid, electric, or alternative fuel?
  EV: Electric vehicle
  BEV: Battery electric vehicle
  CNG: Compressed natural gas
  LPG: Liquified petroleum gas

<table>
<thead>
<tr>
<th>1. Yes, hybrid</th>
<th>2. Yes, plug-in hybrid</th>
</tr>
</thead>
<tbody>
<tr>
<td>3. Yes, electric vehicle or battery electric vehicle (EV, BEV)</td>
<td></td>
</tr>
<tr>
<td>4. Yes, alternative fuel vehicle (CNG, LPG)</td>
<td></td>
</tr>
<tr>
<td>7. Other-specify *(F49B2SPEC. Specify. (String 100))</td>
<td></td>
</tr>
<tr>
<td>5. No; None of the above</td>
<td></td>
</tr>
</tbody>
</table>

*(WEB)* Is this vehicle a...?

<table>
<thead>
<tr>
<th>1. Hybrid</th>
<th>2. Plug-in hybrid</th>
</tr>
</thead>
<tbody>
<tr>
<td>3. Electric vehicle or battery electric vehicle (EV, BEV)</td>
<td></td>
</tr>
<tr>
<td>4. Alternative fuel vehicle (CNG, LPG)</td>
<td></td>
</tr>
<tr>
<td>7. Other - Please specify: <em>(F49B2SPEC)</em></td>
<td></td>
</tr>
<tr>
<td>5. None of the above</td>
<td></td>
</tr>
</tbody>
</table>

F53 RULE: Whether More Vehicles at F48

More Vehicles → REPEAT F49A - F49B2; Max=3; No More Vehicles

Then GO TO F53

End F49
SECTION_F.VEHICLE[1..3] [1..3]=Which vehicle

F53. (CATI) [YEAR MAKE-MODEL]
(And) for your [F49B=DK, RF, NA: [first / second / third] vehicle / ALL OTHERS: [F49B]], did you buy it, lease it, receive it as a gift, or what?

1. Bought  2. Leased  3. Received as a gift
7. Other-specify (F53SPEC. Specify. (String 100)) DK/RF → GO TO F75 RULE

GO TO F55

(WEB) For your [F49B=DK, RF, NA: [first / second / third] vehicle / ALL OTHERS: [F49B] ([F49A]), did you...?

1. Buy it  2. Lease it  3. Receive it as a gift
7. Other - Please specify: (F53SPEC. Specify. (String 100)) NA → GO TO F75 RULE

GO TO F55

F55. (CATI) [YEAR MAKE-MODEL]
In what year did you [F53=BOUGHT: buy / F53=LEASED: lease / F53=GIFT: receive / F53=OTHER: acquire] it?

1901 – [CYEAR]

(WEB) In what year did you [F53=BOUGHT: buy / F53=LEASED: lease / F53=GIFT: receive / F53=OTHER: acquire] it?

1901 – [CYEAR] Year

F57. (CATI) [YEAR MAKE-MODEL]
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

GO TO F58

(WEB) 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

GO TO F58

F58. (CATI) [YEAR MAKE-MODEL]
Is it used primarily for business purposes?

1. Yes  5. No

(WEB) Is it used primarily for business purposes?
“Primarily” means more than half of the miles driven per year are for business.

1. Yes  5. No

F60 RULE: Whether This Vehicle Bought or Leased in P2YEAR-CYEAR

Bought P2YEAR-CYEAR (F53=1 & F55≥P2YEAR)  Leased P2YEAR-CYEAR (F53=2 & F55≥P2YEAR)  All Others → GO TO F75 RULE

↓  GO TO F71 RULE
F61. **(CATI)** [YEAR MAKE-MODEL]

What was the total price of the $F49B=DK, RF, NA: [first / second / third] vehicle / ALL OTHERS: [F49B]]?

$ 1 – 999,997

*(WEB)* What was the total price of the $F49B=DK, RF, NA: [first / second / third] vehicle / ALL OTHERS: [F49B] ([F49A])?  

$ 1 – 999,997 .00  

CHECK: Please enter a number from 1 to 999997.

F64. **(CATI)** [YEAR MAKE-MODEL]

How much did you pay down in cash?  

• IF necessary: Over and above the value of your trade-in or sale.

$ 0 – 999,997

*(WEB)* How much did you pay down in cash, over and above the value of your trade-in or sale?  

$ 0 – 999,997 .00  

CHECK: Please enter a number from 0 to 999997.

F65. **(CATI)** [YEAR MAKE-MODEL]

Did you borrow or finance part of the total price?  

1. Yes  

5. No  

→ GO TO F75 RULE

GO TO F66

*(WEB)* Did you borrow or finance part of the total price?  

1. Yes  

5. No  

→ GO TO F75 RULE

GO TO F66

F66. **(CATI)** [YEAR MAKE-MODEL]

How much did you borrow, not including financing charges?  

$ 1 – 999,997

*(WEB)* How much did you borrow, not including financing charges?  

$ 1 – 999,997 .00  

CHECK: Please enter a number from 1 to 999997.
F67, F67PER. (CATI) [YEAR MAKE-MODEL]
How much are your current payments and how often are they made?
- ENTER [0] if paid off
- ENTER amount here, then SELECT unit of time on next screen (Two weeks, Month, Year)

\[
\begin{array}{c|c}
$0 & \text{GO TO F75 RULE} \\
1 - 999,997 & \text{GO TO F75 RULE}
\end{array}
\]

\[\downarrow\]

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))

GO TO F69

(WEB) How much are your current payments and how often are they made?
Please enter 0 if paid off.

\[
\begin{array}{c|c|c|c|c}
$ & NA & 1 - 999,997 & .00 per & 4. Two weeks / 5. Month / 6. Year \\
\text{GO TO F75 RULE} & & & \text{CHECK: Please enter a number from 0 to 999997.} & \text{7. Other - Please specify: (F67PERSPEC)} \\
& & & \text{SIGNAL: Please select a unit of time} & \text{GO TO F69}
\end{array}
\]

F69. (CATI) [YEAR MAKE-MODEL]
How many payments did you agree to make altogether?

\text{Monthly payments conversions}
- 3 years = 36
- 4 years = 48
- 5 years = 60

\[
\begin{array}{c|c}
1 - 200 &
\end{array}
\]

(WEB) How many payments did you agree to make altogether?

\[
\begin{array}{c|c}
1 - 200 & \text{Number of payments}
\end{array}
\]

F70. (CATI) [YEAR MAKE-MODEL]
How many payments have you made?

\text{Monthly payments conversions}
- 3 years = 36
- 4 years = 48
- 5 years = 60

\[
\begin{array}{c|c}
0 - 200 &
\end{array}
\]

(WEB) How many payments have you made?

\[
\begin{array}{c|c}
0 - 200 & \text{Number of payments}
\end{array}
\]

F71 RULE: Whether This Vehicle Leased in P2YEAR-CYEAR

\[
\begin{array}{c|c|c}
\text{Leased P2YEAR-CYEAR (F55=2 & F55≥P2YEAR) / All Others} & \text{GO TO F75 RULE} \\
\end{array}
\]

\[\downarrow\]
F71. (CATI) [YEAR MAKE-MODEL]
(And for your [F49B=DK, RF, NA: [first / second / third] vehicle / ALL OTHERS: [F49B]],)
how much was your initial outlay for that lease - including your down payment and any fees?

$ 0 – 999,997

(WEB) For your [F49B=DK, RF, NA: [first / second / third] vehicle / ALL OTHERS: [F49B]
([F49A]),) how much was your initial outlay for that lease, including your down payment
and any fees?

$ 0 – 999,997 .00

CHECK: Please enter a number from 0 to 999997.

F72, F72PER. (CATI) [YEAR MAKE-MODEL]
How much are your payments and how often are they made?

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

$ 1 – 999,997 DK/RF → GO TO F75 RULE

↓

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))

GO TO F73

(WEB) How much are your payments and how often are they made?

$ NA → GO TO F75 RULE 1 – 999,997 .00 per

CHECK: Please enter a number from 0 to 999997.

SIGNAL: Please select a unit of time

GO TO F73

F73. (CATI) [YEAR MAKE-MODEL]
How many payments did you agree to make altogether?

Monthly payments conversions
3 years = 36  6 years = 72
4 years = 48  7 years = 84
5 years = 60

1 – 200

(WEB) How many payments did you agree to make altogether?

1 – 200 Number of payments

F74. (CATI) [YEAR MAKE-MODEL]
How many payments have you made?

Monthly payments conversions
3 years = 36  6 years = 72
4 years = 48  7 years = 84
5 years = 60

0 – 200

(WEB) How many payments have you made?

0 – 200 Number of payments
F75 RULE: Whether More Vehicles at F48

<table>
<thead>
<tr>
<th>More Vehicles</th>
<th>→ REPEAT F53 - F74; Max=3;</th>
</tr>
</thead>
<tbody>
<tr>
<td>Then GO TO F76 RULE</td>
<td>No More Vehicles</td>
</tr>
</tbody>
</table>

End VEHICLE

Other Expenses

F76 RULE: Whether FU Has a Vehicle

| Owns/Leases a Vehicle (F47=Yes) | All Others | → GO TO F81A |
|-------------------------------|-------------|

F77, F77PER. (CATI) [ALL VEHICLES: YEAR MAKE-MODEL]

How much do you [and your family living there] pay for car insurance [F48=2+, DK: for all of your vehicles]?

- IF necessary: Please give me your best estimate.
- ENTER amount here, then SELECT unit of time on next screen (Every 6 months, Month, Year)

$ 0 → GO TO F80D

$ 1 – 999,997 DK/RF → GO TO F80D

The amount entered is: [F77] per ____

- SELECT the unit of time below

4. Every 6 months 5. Month 6. Year 7. Other-specify (F77PERSPEC, Specify, [String 100])

(WEB) How much do you [and your family living there] pay for car insurance [F48>1, NA: for all of your vehicles]?

$ 0 – 99,997 .00 per

CHECK: Please enter a number from 0 to 99997.

4. Every 6 months 5. Month 6. Year

7. Other - Please specify: (F77PERSPEC)

SIGNAL: Please select a unit of time

F80D. (CATI) How much did you [and your family living there] pay for car repairs and maintenance in the last 12 months?

- IF needed: We’re talking about the last 12 months
- ENTER to the nearest dollar.
- If None, ENTER [0]

$ 0 – 99,997

(WEB) How much did you [and your family living there] pay for car repairs and maintenance in the LAST 12 MONTHS?

$ 0 – 99,997 .00

CHECK: Please enter a number from 0 to 99997.

F78 RULE: Whether Any Vehicle Bought or Leased Before P2YEAR

| Vehicle Bought/Leased Before P2YEAR (F53=1-2 & F55<P2YEAR) | All Others | → GO TO F80B |
|-------------------------------------------------------------|-------------|

F79. (CATI) [Vehicles Bought/Leased < [P2YEAR]: YEAR MAKE-MODEL]
[ANY VEHICLE BOUGHT/LEASED P2YEAR OR LATER: Other than the car payments you already told me about, how / ALL OTHERS: How] much did you [and your family living there] pay in car payments in [LAST MONTH]?

- If needed: We’re talking about last month ([LAST MONTH])
- INCLUDE vehicle purchase and lease payments not already covered

$0 – 999,997

(WEB) [ANY VEHICLE BOUGHT/LEASED P2YEAR OR LATER: Other than the car payments you already reported, how / ALL OTHERS: How] much did you [and your family living there] pay in car payments in [LAST MONTH]?

$0 – 999,997.00

CHECK: Please enter a number from 0 to 999997.

F80B. (CATI) Altogether for the month of [LAST MONTH], how much did you [and your family living there] pay for each of these transportation related expenses. Do not include costs associated with trips and vacations, which we will ask about later.

Gasoline?
- If needed: We’re talking about last month ([LAST MONTH])
- ENTER to the nearest dollar.
- If None, ENTER [0]

$0 – 99,997

F80C. (CATI) Altogether for the month of [LAST MONTH], how much did you [and your family living there] 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?
- If needed: We’re talking about last month ([LAST MONTH])
- ENTER to the nearest dollar.
- If None, ENTER [0]

$0 – 99,997

F81A. (CATI) [F47=YES: Altogether for the month of [LAST MONTH], how much did you [and your family living there] pay for each of these transportation related expenses. Do not include costs associated with trips and vacations, which we will ask about later.] / [F47<>YES: Altogether for the month of [LAST MONTH], how much did you [you and your family living there] 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?
- If needed: We’re talking about last month ([LAST MONTH])
- ENTER to the nearest dollar.
- If None, ENTER [0]

$0 – 99,997

F81B. (CATI) (Altogether for the month of [LAST MONTH], how much did you [and your family living there] pay for each of these transportation related expenses. Do not include costs associated with trips and vacations, which we will ask about later.)

Taxicabs?
- If needed: Please include ride sharing services like Uber and Lyft
- If needed: We’re talking about last month ([LAST MONTH])
- ENTER to the nearest dollar.
- If None, ENTER [0]

$0 – 99,997
F81C. (CATI) (Altogether for the month of [LAST MONTH], how much did you [and your family living there] 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?
• If needed: We’re talking about last month ([LAST MONTH])
• ENTER to the nearest dollar.
• If None, ENTER [0]

$ 0 – 99,997

F80B-F81C GRID. (WEB) Altogether for the month of [LAST MONTH], how much did you [and your family living there] pay for each of these transportation-related expenses? Do not include costs associated with trips and vacations.

<table>
<thead>
<tr>
<th>F80B. Gasoline.</th>
<th>$ 0 – 99,997 .00</th>
</tr>
</thead>
<tbody>
<tr>
<td>F80C. Parking and carpool.</td>
<td>$ 0 – 99,997 .00</td>
</tr>
<tr>
<td>F81A. Bus fares and train fares.</td>
<td>$ 0 – 99,997 .00</td>
</tr>
<tr>
<td>F81B. Taxicabs.</td>
<td>$ 0 – 99,997 .00</td>
</tr>
<tr>
<td></td>
<td>Please include ride sharing services like Uber and Lyft.</td>
</tr>
<tr>
<td>F81C. Other transportation costs.</td>
<td>$ 0 – 99,997 .00</td>
</tr>
</tbody>
</table>

CHECK: Please enter a number from 0 to 99997.

F81CSPEC RULE: Whether There are Other Transportation Costs

Other Transportation Costs (F81C=1-99997) All Others → GO TO F82

F81CSPEC. (CATI) What were those other costs?
String 100

(WEB) What were those other transportation costs?
String 100

F82. (CATI) In [PYEAR], did you [and your family living there] 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 5. No → GO TO F86A

GO TO F83

(WEB) LAST YEAR, in [PYEAR], did you [and your family living there] 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, or
• Purchase or rental of books, supplies, uniforms, or equipment including computers and software?
1. Yes 5. No → GO TO F86A

GO TO F83
F83. *(CATI)* How much in total were these expenses?

$ 1 – 999,997

*(WEB)* How much in total were these expenses?

$ 1 – 999,997 .00

*CHECK:* Please enter a number from 1 to 999997.

F84. *(CATI)* In [PYEAR], were there any other school-related expenses not already covered in the previous question?

1. Yes 5. No → GO TO F85

*WEB* In [PYEAR], were there any other school-related expenses not already covered in the previous question?

1. Yes 5. No → GO TO F85

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

String 400

*WEB* What other types of school-related expenses did you have?

String 400

F86. *(CATI)* Altogether, how much were these other expenses?

$ 1 – 999,997

*(WEB)* Altogether, how much were these other expenses?

$ 1 – 999,997 .00

*CHECK:* Please enter a number from 1 to 999997.

F86A. *(CATI)* [F82=YES OR F84=YES]: Not including any amounts already reported, how / ALL OTHERS: How much did you [and your family living there] spend altogether in [PYEAR] on computers, laptops, tablets, cell phones, game players, and software for these devices?

- IF needed: Do not include cell phone or internet service

$ 0 – 999,997 → GO TO F87  DK/RF → GO TO F86A1

*(WEB)* [F82=YES OR F84=YES]: Not including any amounts already reported, how / ALL OTHERS: How much did you [and your family living there] spend altogether in [PYEAR] on computers, laptops, tablets, cell phones, game players, and software for these devices? Please do not include cell phone or internet service.

$ 0 – 999,997 .00 → GO TO F87  NA → GO TO F86A1F86A3_W

*CHECK:* Please enter a number from 1 to 999997.

F86A1. *(CATI ONLY)* Would it amount to $600 or more?

1. Yes 5. No ↘

F86A3. *(CATI ONLY)* Would it amount to $900 or more?

1. Yes 5. No  DK/RF → GO TO F87

F86A2. *(CATI ONLY)* Would it amount to $400 or more?

1. Yes 5. No  DK/RF → GO TO F87
What is your best estimate?

1. Less than $400
2. $400 to less than $600
3. $600 to less than $900
4. $900 or more

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]. How much did you [and your family living there] 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 → GO TO F87A

The amount entered is: [F87] per __

- SELECT the unit of time below

5. Month
6. Year
7. Other-specify (F87PERSPEC. Specify. (String 100))

GO TO F88
F88, F88PER. *(CATI)* (How much did you [and your family living there] 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 | → GO TO F88A |

The amount entered is: [F88] per __

- SELECT the unit of time below

5. Month 6. Year 7. Other-specify *(F88PERSPEC. Specify. (String 100))*

GO TO F89

*(WEB)* How much did you [and your family living there] spend altogether in [PYEAR] on household furnishings and equipment, including household textiles, furniture, floor coverings, major appliances, small appliances, and miscellaneous housewares?

| $ 0 – 999,997 | .00 per | 5. Month | 6. Year | NA | → GO TO F88AF88C_W |

CHECK: Please enter a number from 0 to 999997.

SIGNAL: Please select a unit of time

GO TO F89

F88A. *(CATI ONLY)* Would it amount to $500 or more?

| 1. Yes | 5. No | DK/RF | → GO TO F89 |

↓

F88B. *(CATI ONLY)* $1,500 or more?

| 1. Yes | 5. No | DK/RF | → GO TO F89 |

F88C. *(CATI ONLY)* $100 or more?

| 1. Yes | 5. No | DK/RF | → GO TO F89 |

F88AF88C_W. *(WEB ONLY)* What is your best estimate?

| 1. Less than $100 | 2. $100 to less than $500 |
| 3. $500 to less than $1,500 | 4. $1,500 or more |

F89, F89PER. *(CATI)* (How much did you [and your family living there] 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 | → GO TO F90 | $ 1 – 999,997 | DK/RF | → GO TO F89A |

The amount entered is: [F89] per __

- SELECT the unit of time below

5. Month 6. Year 7. Other-specify *(F89PERSPEC. Specify. (String 100))*

GO TO F90

*(WEB)* How much did you [and your family living there] spend altogether in [PYEAR] on clothing and apparel, including footwear, outerwear, and products such as watches or jewelry?

| $ 0 – 999,997 | .00 per | 5. Month | 6. Year | NA | → GO TO F89AF89C_W |

CHECK: Please enter a number from 0 to 999997.

SIGNAL: Please select a unit of time

GO TO F90
F89A. *(CATI ONLY)* Would it amount to $700 or more?  
1. Yes  5. No  DK/RF  → GO TO F90

F89B. *(CATI ONLY)* $1,500 or more?  
1. Yes  5. No  DK/RF  → GO TO F90

1. Yes  5. No  DK/RF  → GO TO F90

F89C. *(CATI ONLY)* $200 or more?  
1. Yes  5. No  DK/RF  → GO TO F90

F90, F90PER. *(CATI)* *(How much did you [and your family living there] 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  → GO TO F91  $ 1 – 999,997  DK/RF  → GO TO F90A

The amount entered is: [F90] per ___  
- SELECT the unit of time below  
5. Month  6. Year  7. Other-specify *(F90PERSPEC. Specify. (String 100))*  
GO TO F91

*WEB* How much did you [and your family living there] spend altogether in [PYEAR] on trips and vacations, including transportation, accommodations, and recreational expenses on trips?  
$ 0 – 999,997 .00 per  5. Month  6. Year  NA  → GO TO F90A

CHECK: Please enter a number from 0 to 999997.  
SIGNAL: Please select a unit of time  
GO TO F91

F90A. *(CATI ONLY)* Would it amount to $500 or more?  
1. Yes  5. No  DK/RF  → GO TO F91

F90B. *(CATI ONLY)* $1,500 or more?  
1. Yes  5. No  DK/RF  → GO TO F90

1. Yes  5. No  DK/RF  → GO TO F90

F90C. *(CATI ONLY)* $200 or more?  
1. Yes  5. No  DK/RF  → GO TO F90

F90AF90C_W. *(WEB ONLY)* What is your best estimate?  
1. Less than $200  2. $200 to less than $700  3. $700 to less than $1,500  4. $1,500 or more

F90AF90C_W. *(WEB ONLY)* What is your best estimate?  
1. Less than $200  2. $200 to less than $500  3. $500 to less than $1,500  4. $1,500 or more
F91, F91PER. *(CATI)* (How much did you [and your family living there] 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: 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 → GO TO SECTION G  $1–999,997 DK/RF → GO TO F91A

  The amount entered is: [F91] per __

- SELECT the unit of time below

  5. Month  6. Year  7. Other-specify (F91PERSPEC. Specify. (String 100))

  GO TO SECTION G

*(WEB)* How much did you [and your family living there] spend altogether in [PYEAR] on recreation and entertainment, including tickets to movies, and sporting events; and performing arts and hobbies, including exercise, bicycles, trailers, camping, photography, and reading materials? [F90<>0: Do not include costs associated with the trips and vacations you already reported.]

  $0–999,997 .00 per  5. Month  6. Year  NA → GO TO F91AF91C_W

  CHECK: Please enter a number from 0 to 999997.

  SIGNAL: Please select a unit of time

  GO TO SECTION G

F91A. *(CATI ONLY)* Would it amount to $500 or more?

  1. Yes

  ↓

  5. No DK/RF → GO TO SECTION G

F91B. *(CATI ONLY)* $1,500 or more?

  1. Yes

  ↓

F91C. *(CATI ONLY)* $200 or more?

  1. Yes  5. No DK/RF

  GO TO SECTION G

F91AF91C_W. *(WEB ONLY)* What is your best estimate?

  1. Less than $200  2. $200 to less than $500

  3. $500 to less than $1,500  4. $1,500 or more

  GO TO SECTION G

End SECTION_F
Section G: Income; OFUM Education

G1. *(CATI ONLY)* Now I have some questions about finances and income.

- ENTER [1] to continue
- 1. Continue

PYear Farm Income

G1A. CAI Checkpoint: Whether Reference Person or Spouse-Partner is a Farmer or Rancher on Current Main Job

<table>
<thead>
<tr>
<th>Farmer/Rancher (JOBTYPE=CMJ &amp; BC28=Yes)</th>
<th>5. All Others → GO TO G5</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Reference Person Only</td>
<td>2. Spouse-Person Only</td>
</tr>
</tbody>
</table>

G2. *(CATI)* What were [\(R=RP\): [your / your (and [SPOUSE-PARTNER]’s)] / [\(R=SP\): [your / your (and [REFERENCE PERSON]’s)] / [\(R=OFUM\), PROXY: [[REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s / [REFERENCE PERSON]’s and [SPOUSE-PARTNER]’s] total receipts from farming in [PYEAR], including soil bank payments and commodity credit loans?

$ 0 – 9,999,997

G3. *(CATI)* What were [\(R=RP\): [your / your (and [SPOUSE-PARTNER]’s)] / [\(R=SP\): [your / your (and [REFERENCE PERSON]’s)] / [\(R=OFUM\), PROXY: [[REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s / [REFERENCE PERSON]’s and [SPOUSE-PARTNER]’s] total operating expenses in [PYEAR], not counting living expenses?

$ 0 – 9,999,997

G2-G3 GRID. *(WEB)* These next questions are about finances and income. What were [\(R=RP\): [your / your (and [SPOUSE-PARTNER]’s)] / [\(R=SP\): [your / your (and [REFERENCE PERSON]’s)] / [\(R=OFUM\), PROXY: [[REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s / [REFERENCE PERSON]’s and [SPOUSE-PARTNER]’s] total receipts and operating expenses from in [PYEAR]? Please include soil bank payments and commodity credit loans. Do not include living expenses.

G2. Receipts. $ 0 – 9,999,997 .00

G3. Expenses. $ 0 – 9,999,997 .00

CHECK: Please enter a number from 0 to 9999997.

G4CKPT. CAI Checkpoint: Whether G2 or G3 is Not Response

| 1. G2=DK, RF, NA or G3=DK, RF, NA | 5. All Others → (Assign G4=G2 minus G3) GO TO G5 |

G4. *(CATI)* (And) what was the net income from farming in [PYEAR]?
- Receipts: [Don’t Know / Refused / $[G2]]
- Expenses: [Don’t Know / Refused / $[G3]]

$ -999,999 – 9,999,997

*(WEB)* What was the net income from farming in [PYEAR]?

*For amounts less than $0.00, enter the minus symbol (-) and then the amount. For example: Enter “-500” to indicate a loss of $500.00.*
$ \text{\textdollar} \quad 999,999 - 9,999,997 \quad .00$

CHECK: Please enter a number from 999,999 to 9999997.

PYear Businesses

G5. (CATI) Did [you / [REFERENCE PERSON]] [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 \quad \rightarrow \text{GO TO G12}

GO TO G6

(WEB) [G1A=5: These next questions are about finances and income.] Did [you / [REFERENCE PERSON]] [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 \quad \rightarrow \text{GO TO G12}

GO TO G6

G6. (CATI) How many businesses or financial interests did [you / [REFERENCE PERSON]] [or anyone else in the family there] have in [PYEAR]?

1. One \quad \rightarrow \text{GO TO G7A}
2. Two
3. Three
4. Four
5. Five or more
dk/rf \quad \rightarrow \text{GO TO G12}

GO TO G7

(WEB) How many businesses or financial interests did [you / [REFERENCE PERSON]] [or anyone else in the family there] have in [PYEAR]?

1. One
2. Two
3. Three
4. Four
5. Five or more
NA \quad \rightarrow \text{GO TO G12}

GO TO G7A

SECTION_G.G7_G11[1..5] [1..5]=Which business

G7. (CATI ONLY) [LOOP 1: 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. (CATI) Business #[1..5]

What kind of business was that?

String 500

(WEB) [G6>1-LOOP 1: The next series of questions are about each business separately / G6>1-LOOP 2-5: And now some questions about the next business].

What kind of business was [G6>1: that / G6>1: the [first / second / third / fourth / fifth] one]?
G7B. **(CATI)** 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)

**(WEB)** What was the name of that business?
*If you prefer not to enter the name of the business, please enter a nickname or anything that will identify this business to you.*
The information we collect is confidential, and that includes maintaining confidentiality in collecting information about businesses.

(String 25)

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

1 – 24. [CYNAMF] [CYNAML], [CYAQRTH], [CYFUHU]  
97. Owner not on family list (G8SPEC. Who was that? (String 100))

**(WEB)** Who in the family living there owned that business?  
*Please select all that apply.*

1 – 24. [CYNAMF] [CYNAML]. (age [AGEIWDATE])  
97. Someone else - *Please specify:* (G8SPEC)

**SECTION_G.G7_G11[1..5].G9_G10[1..2]**  
G9AQSN. AQSN of Current Reference Person (Spouse-Partner). Assigned.

G9A. **(CATI)** Business #[1..5]: [G7B] - [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] ([Respondent])
Did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] put in any work time for this business in [PYEAR]?
- **PROBE** if inconsistent with employment section

1. Yes 5. No → GO TO G9 RULE  
GO TO G9B

**(WEB)** Did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] put in any work time for this business in [PYEAR]?

1. Yes 5. No → GO TO G9 RULE  
GO TO G9B
G9B. (CATI) Business #[1..5]: [G7B] - [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
Did you tell me about this work earlier, including jobs we already talked about?
- [ANY JOB BCWTRP1YEAR=1: If needed, PROBE: Let me remind you of the jobs reported for [PYEAR] (READ LIST):
[List of PYEAR Employers from Section BC)]

1. Yes, these work hours were reported → GO TO G9 RULE
5. No, these work hours were not reported DK/RF → GO TO G9 RULE

(WEB) [ANY JOB BCWTRP1YEAR=1: [PYEAR] employers/jobs reported earlier:
[List of PYEAR Employers from Section BC]]
Have you already reported this work, including jobs already reported for [PYEAR]?
1. Yes → GO TO G9 RULE
5. No → GO TO G9J3H
NA → GO TO G9 RULE

G9J1H. (CATI ONLY) Business #[1..5]: [G7B] - [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
Then I would like to ask you some questions now about this business and [your / [REFERENCE PERSON]'s / [SPOUSE-PARTNER]'s] work in it.
- ENTER [1] to continue

1. Continue

G9J3H. (CATI) Business #[1..5]: [G7B] - [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
What sort of work did [you / he / she] do?
- DO NOT PROBE

(WEB) The following questions are about this business and [your / [REFERENCE PERSON]'s / [SPOUSE-PARTNER]'s] work in it. What sort of work did [you / he / she] do?

String 500

G9J3AH. (CATI) Business #[1..5]: [G7B] - [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
What was the official title of [your / [REFERENCE PERSON]'s / [SPOUSE-PARTNER]'s] job? (The title that the business used.)
- DO NOT PROBE

(WEB) What was the official title of [your / [REFERENCE PERSON]'s / [SPOUSE-PARTNER]'s] job, that is, the title that the business used?

String 200
G9J4H. (CATI) Business #[1..5]: [G7B] - [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] ([Respondent])
And, how many weeks did [you / he / she] work at this business in [PYEAR]?
1 – 52

(WEB) How many weeks did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] work at this business in [PYEAR]?
1 – 52 Number of weeks
CHECK: Please enter a number from 1 to 52.

G9J5H. (CATI) Business #[1..5]: [G7B] - [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] ([Respondent])
On average, how many hours a week did [you / he / she] work at this business in [PYEAR]?
• ROUND DOWN for fractions less than ½ (0.5)
• ROUND UP for fractions ½ (0.5) or more
1 – 168

(WEB) On average, how many hours a week did [you / he / she] work at this business in [PYEAR]?
1 – 168 Number of hours per week
CHECK: Please enter a number from 1 to 168.

G9J6HMO, G9J6HYR. (CATI) Business #[1..5]: [G7B] - [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] ([Respondent])
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?


• The month entered is: [G9J6HMO]
• ENTER the year below
1901 – [PYEAR] Actual year
1901 – [PYEAR] 0-9997. Before [PYEAR] but don’t know exact year (SP_0A)

(WEB) In what month and year did [you / he / she] start working at this business?
If you do not know the month, please select the season.

4. April 10. October 24. Fall (Sep-Nov)
5. May 11. November
6. June 12. December

1901 – [PYEAR] Year
0-9997. Before [PYEAR] but don’t know exact year (SP_0A)
CHECK: Please enter a date before today.
CHECK: Please enter a year earlier than [CYEAR].
G9J7H. (CATI) Business #[1..5]: [G7B] - [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

In which months during [PYEAR] [were you / was he / was she] working at this business?

- ENTER all that apply
- PROBE: Any others?

Select All | Clear All
--- | ---

WEB) In which months during [PYEAR] [were you / was he / was she] working at this business?
Please select all that apply.

Select All | Clear All
--- | ---

G9J8H. (CATI) Business #[1..5]: [G7B] - [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

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

1. Yes 5. No → GO TO G9 RULE

GO TO G9J9HMO

WEB) [Have you / Has he / Has she] stopped working at this business?

1. Yes 5. No → GO TO G9 RULE

GO TO G9J9HMO
G9J9HMO, G9J9HYR. (CATI) Business #[1..5]: [G7B] - [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

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?

Select


The month entered is: [G9J9HMO]
- ENTER the year below

[PYEAR] – [CYEAR] 0 9996. [PYEAR]–[CYEAR], DK which year (SP_0B)

(WEB) In what month and year was that?
If you do not know the month, please select the season.

Select

Month

4. April        10. October 24. Fall (Sep-Nov)

Season

5. May        11. November
6. June       12. December

[PYEAR] – [CYEAR] Year
0 9996. [PYEAR]–[CYEAR] but don’t know which year (SP_0B)

CHECK: Please enter a year from [PYEAR] to [CYEAR].
CHECK: Please enter a date after your start date ([G9J6MO], [G9J6YR]).
CHECK: Please enter a date before today.

G9J10H. (CATI) Business #[1..5]: [G7B] - [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

What happened - did it go out of business, did [you / he / she] quit, or what?

String 500

(WEB) What happened - did it go out of business, did [you / he / she] quit, or something else?

String 500

G9 RULE: Whether Spouse-Partner in FU (CYAQRTH=201-222, CYFUHU=FU, FUMI)

Spouse-Partner → REPEAT G9A - G9J10H; No Spouse-Partner
Then GO TO G10

End G9_G10

G10. (CATI) Business #[1..5]: [G7B] - [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

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

1. Corporation → GO TO G11DCKPT
2. Unincorporated → GO TO G11
7. Other-specify (G10SPEC. Specify (String 100)) DK/RF

(WEB) Was this business a...?

1. Corporation → GO TO G11DCKPT
2. Unincorporated business → GO TO G11
7. Other - Please specify: (G10SPEC) NA

GO TO G11-G11A GRID
G11. *(CATI)* Business #[1..5]: [G7B] - [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
What were the total receipts from the business in [PYEAR]?
$ 0 – 9,999,997

G11A. *(CATI)* Business #[1..5]: [G7B] - [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
What were the total operating expenses, not counting living expenses (in [PYEAR])?
$ 0 – 9,999,997

G11-G11A GRID. *(WEB)* What were the total receipts and operating expenses, not counting living expenses, from this business in [PYEAR]?
G11. Receipts. $ 0 – 9,999,997 .00
G11A. Expenses. $ 0 – 9,999,997 .00
*CHECK*: Please enter a number from 0 to 9999997.

G11CKPT. CAI Checkpoint: Whether G11 or G11A is Not Response

```
1. G11=DK, RF, NA or G11A=DK, RF, NA 5. All Others  → (Assign G11B=G11 minus G11A)
```

G11B. *(CATI)* Business #[1..5]: [G7B] - [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
(And) what was the net income from the business (in [PYEAR])?
- Receipts: [Don’t Know / Refused / $[G11]]
- Expenses: [Don’t Know / Refused / $[G11A]]

$ -999,999 – 9,999,997  → GO TO G12 RULE

*(WEB)* What was the net income from the business in [PYEAR]?
*For amounts less than 50.00, enter the minus symbol (-) and then the amount. For example: Enter “-500” to indicate a loss of $500.00.*

$ -999,999 – 9,999,997 .00  → GO TO G12 RULE

*CHECK*: Please enter a number from -999,999 to 9999997.

G11DAQSN. AQSN of Current Reference Person (Spouse-Partner). Assigned.

G11DCKPT. CAI Checkpoint: Whether Worked For This Corporation But Did Not Report It

```
1. Worked For Corp But Didn’t Report It (G9A=Yes & G9B<>Yes) 5. All Others  → GO TO G11E RULE
```

G11D. *(CATI)* Business #[1..5]: [G7B] - [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
How much did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] make at this business in [PYEAR]?
$ 1 – 9,999,997

*(WEB)* How much did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] make at this business in [PYEAR]?
$ 1 – 9,999,997 .00

*CHECK*: Please enter a number from 1 to 9999997.
G11E RULE: Whether Spouse-Partner in FU (CYAQRTH=201-222, CYFUHU=FU, FUMI)

<table>
<thead>
<tr>
<th>Spouse-Partner</th>
<th>REPEAT G11DCKPT - G11D; No Spouse-Partner</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Then GO TO G12 RULE</td>
</tr>
</tbody>
</table>

End G11D_G11E

G12 RULE: Number of Businesses at G6

<table>
<thead>
<tr>
<th>More Businesses</th>
<th>REPEAT G7 - G11E RULE; Max=5; No More Businesses</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Then GO TO G12</td>
</tr>
</tbody>
</table>

End G7_G11

PYear Income


G12AQSN. AQSNO of Current Reference Person (Spouse-Partner). Assigned.

Earnings from Work

G12. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
Did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] earn wages or salaries in [PYEAR] from working on any jobs, including jobs we already talked about? [G9A=YES & G10=UNINCORPORATED: Do not include the unincorporated business we have just talked about.]

- **IF needed, PROBE:** This includes wages and salaries from the job(s) we talked about earlier.
- **[ANY JOB BCWTRP1YEAR=1: IF needed, PROBE:** Let me remind you of the jobs reported for [PYEAR] (READ LIST): [List of PYEAR Employers from Section BC]]

1. Yes ➔ GO TO G13
5. No ➔  

GO TO G12CKPT2

(WE) [ANY JOB BCWTRP1YEAR=1: [PYEAR] employers/jobs reported earlier: [List of PYEAR Employers from Section BC]]

Did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] earn wages or salaries in [PYEAR] from working on any jobs, including jobs already reported for [PYEAR]? [G9A=YES & G10=UNINCORPORATED: This does not include the unincorporated business you just reported.]

1. Yes ➔ GO TO G13
5. No ➔  

GO TO G12CKPT2

G12CKPT2/G12CKPT2S. CAI Checkpoint: Whether PYEAR Job Reported or Worked PYEAR for Incorporated Business

1. All PYEAR Jobs are Not Self-Employed (All Jobs w/BCWTRP1YEAR=1 are BC22<>3)
2. No PYEAR Jobs or Any PYEAR Job is Self-Employed, and Worked For Incorporated Business in PYEAR ((No Jobs w/BCWTRP1YEAR=1 or any job w/BCWTRP1YEAR=1 is BC22=3) & (Any Biz is G9A=Yes & G10=Corp))
5. All Others ➔  

GO TO G16

GO TO G12 CHECK (CATI) or G12A (WEB)
G12 CHECK (CATI ONLY): [Reference Person / Spouse-Partner] either reported a [PYEAR] job in the EHC, or reported working for an incorporated business in [PYEAR], but reported NO wages or salary at G12.

- If the [PYEAR] job is THE SAME as work reported in [PYEAR] for an UNincorporated business, DO NOT PROBE - SELECT [Suppress] and enter this information in G12A.
- Otherwise, PROBE: (Were/Was) there any wage(s) or salary(s) from (this job/these jobs) in [PYEAR]?
- If "YES", PRESS [Enter] or SELECT [Go To], to go to G12 & ENTER [Yes]
- If "NO", SELECT [Suppress] to go to G12A & record explanation.

Yes → RETURN TO G12  No

G12A. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

How is it that [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] worked in [PYEAR], but did not receive earnings from it?

String 500
GO TO G16

(WEB) How is it that [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] worked in [PYEAR], but did not receive earnings from it?

String 500
GO TO G16

G13. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

How much did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] earn altogether from wages or salaries in [PYEAR], that is, before anything was deducted for taxes or other things? [G9A= YES & G10= UNINCORPORATED: Do not include income from unincorporated businesses we talked about earlier.]

$ 1 – 9,999,997

(WEB) How much did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] earn altogether from wages or salaries in [PYEAR], that is, before anything was deducted for taxes or other things? [G9A= YES & G10= UNINCORPORATED: Please do not include income from any unincorporated businesses you reported earlier.]

$ 1 – 9,999,997 .00

CHECK: Please enter a number from 1 to 9999997.

G14. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

In addition to this, did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] have any income from bonuses, overtime, tips, or commissions in [PYEAR]?

1. Yes → GO TO G16A  5. No → GO TO G17F

(WEB) In addition to this, did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] have any income from bonuses, overtime, tips, or commissions in [PYEAR]?

1. Yes → GO TO G16A  5. No → GO TO G17F
G16. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
Did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] have any income from bonuses, overtime, tips, or commissions in [PYEAR]?

1. Yes 5. No → GO TO G18A
GO TO G16A

(WEB) Did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] have any income from bonuses, overtime, tips, or commissions in [PYEAR]?

1. Yes 5. No → GO TO G18A
GO TO G16A

G16A. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
Which was that?

- ENTER all that apply
- PROBE: Any others?


ASK G17A ASK G17B ASK G17C ASK G17D ASK G16B, G17E

(WEB) Which was that?
Please select all that apply.


G17A. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
How much was from bonuses in [PYEAR]?

$ 1 – 999,997

G17B. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
How much was from overtime in [PYEAR]?

$ 1 – 999,997

G17C. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
How much was from tips in [PYEAR]?

$ 1 – 999,997

G17D. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
How much was from commissions in [PYEAR]?

$ 1 – 999,997

G16B. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
What was that other job-related income from in [PYEAR]?

String 500

G17E. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
How much was from other job related income in [PYEAR]?

$ 1 – 999,997
G17A-G17E GRID. (WEB) In [PYEAR] how much was from...?

G16A=1: Bonuses. $1 – 999,997 .00
G16A=2: Overtime. $1 – 999,997 .00
G16A=3: Tips. $1 – 999,997 .00
G16A=4: Commissions. $1 – 999,997 .00
G16A=7: Other job-related income. $1 – 999,997 .00

CHECK: Please enter a number from 1 to 999997.

G17F. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [((Respondent)]
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)? (Including the jobs we already talked about.)

- [ANY JOB BCWTRP1YEAR=1: If needed, PROBE: Let me remind you of the jobs reported for [PYEAR] (READ LIST):
  [List of PYEAR Employers from Section BC]]

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

GO TO G17J1

(WEB) [ANY JOB BCWTRP1YEAR=1: [PYEAR] employers/jobs reported earlier:
[List of PYEAR Employers from Section BC]]
Have you already reported about all the jobs that go with [G16A=1 selection: this income / G16A >1 selection: these incomes / G16A=NA: the income you reported], including jobs already reported for [PYEAR]?

1. Yes → GO TO G18A
5. No NA → GO TO G18A

GO TO G17J1

G17J1. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [((Respondent)]
Then I would like to ask you some questions now about the work [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] did for this income in [PYEAR]. Did [you / he / she] work for the government or a private company?

- If R says Government, PROBE: Is that the federal, state, or local government?

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

(WE) The following questions are about the additional work [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] did for this income in [PYEAR] that you have not already reported. Did [you / he / she] work for ...

1. The federal government
2. A state government
3. A local government
4. A private company
5. [Yourself / Himself / Herself] (self-employed)
7. Other - Please specify: (G17J1SPEC)
G17J2. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
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)

WEB) What was the name of that employer?
If you prefer not to enter the employer’s name, please enter a nickname or anything that will identify this employer business to you.
The information we collect is confidential, and that includes maintaining confidentiality in collecting information about employers.

(String 25)

G17J3. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
What sort of work did [you / he / she] do?
- DO NOT PROBE

(String 500)

WEB) What sort of work did [you / he / she] do?

(String 500)

G17J3B. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
What kind of business or industry was that in?
- DO NOT PROBE

(String 500)

WEB) What kind of business or industry was that in?

(String 500)

G17J3C. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
What was the official title of [your / [REFERENCE PERSON]’s / SPOUSE-PARTNER]’s job? (The title that [your / his / her] employer used.)
- DO NOT PROBE

(String 200)

WEB) What was the official title of [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] job, that is, the title that [your / his / her] employer used.

(String 200)

G17J4. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
And, how many weeks did [you / he / she] work at this in [PYEAR]?

1 – 52

WEB) How many weeks did [you / he / she] work at this job in [PYEAR]?

1 – 52 Number of weeks
CHECK: Please enter a number from 1 to 52.
G17J5. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

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

1 – 168

(WEB) On average, how many hours a week did [you / he / she] work in [PYEAR]?

1 – 168  Number of hours per week

CHECK: Please enter a number from 1 to 168.

G17J6MO, G17J6YR. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

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?


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

1901 – [PYEAR] 0 9997. Before [PYEAR] but don’t know exact year (SP_0A)

(WEB) In what month and year did [you / he / she] start this work?
If you do not know the month, please select the season.

4. April 10. October 24. Fall (Sep-Nov)
5. May 11. November
6. June 12. December

1901 – [PYEAR] Year
0 9997. Before [P2YEAR] but don’t know exact year (SP_0A)

CHECK: Please enter a date before today.
CHECK: Please enter a year earlier than [CYEAR].

G17J7. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

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

Select All Clear All

(WEB) In which months during [PYEAR] [were you / was he / was she] working at it?
Please select all that apply.

Select All Clear All
G17J8. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

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

1. Yes 5. No   → GO TO G18A

GO TO G17J9MO

(WEB) [Have you / Has he / Has she] stopped this work?

1. Yes 5. No   → GO TO G18A

GO TO G17J9MO

G17J9MO, G17J9YR. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

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?

Select  

The month entered is: [G17J9MO]

• ENTER the year below

[PYEAR] – [CYEAR]  0 9996. [PYEAR]-[CYEAR], DK which year (SP_0B)

(WEB) In what month and year was that?

If you do not know the month, please select the season.

Select  
Month or Season
4. April 10. October 24. Fall (Sep-Nov)
5. May 11. November
6. June 12. December

[PYEAR] – [CYEAR] Year

0 9996. [PYEAR]-[CYEAR] but don’t know which year (SP_0B)

CHECK: Please enter a year from [PYEAR] to [CYEAR].
CHECK: Please enter a date after your start date ([G17J6MO], [G17J6YR]).
CHECK: Please enter a date before today.

G17J10. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

What happened - did [your / his / her] employer close or go out of business, did [you / he / she] quit, or what?

String 500

(WEB) What happened - did [your / his / her] employer close or go out of business, did [you / he / she] quit, or something else?

String 500
Professional Practice or Trade

G18A. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
I’m going to read you a list of other sources of income [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] might have had. Did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] receive any other income in [PYEAR] from professional practice or trade?

1. Yes  5. No → GO TO G18GIGA

GO TO G19A

(WEB) The following questions are about any other sources of income [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] might have had that you have not already reported. Did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] receive any other income in [PYEAR] from professional practice or trade?

1. Yes  5. No → GO TO G18GIGA

GO TO G19A

G19A, G19APER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
How much was it (in [PYEAR])?

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

$ 1 – 9,999,997.00 DK/RF → GO TO G20A

↓

The amount entered is: [G19A] per _____

- SELECT the unit of time below


7. Other-specify (G19APERSPEC. Specify. (String 100))

(WEB) How much was it in [PYEAR]?

$ 1 – 9,999,997.00 per 2. Day  3. Week  4. Two weeks  5. Month  6. Year

CHECK: Please enter a number from 1 to 9999997.

7. Other - Please specify: (G19APERSPEC)

SIGNAL: Please select a unit of time.

G20A. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
During which months of [PYEAR] did [you / he / she] get this income?

- ENTER all that apply

- PROBE: Any others?

Select All  Clear All


(WEB) During which months of [PYEAR] did [you / he / she] get this income?
Please select all that apply.

Select All  Clear All

Reported Incomes: Professional Practice or Trade

Did you tell me earlier about all the jobs that go with this income? (Including the jobs we already talked about.)

- [ANY JOB BCWTRP1YEAR=1: If needed, PROBE: Let me remind you of the jobs you reported for [PYEAR] (READ LIST):]
  - [List of PYEAR Employers from Section BC]]

1. Yes, R reported all jobs that produced this income → GO TO G18GIGA
5. No, R did not report all jobs that produced this income → GO TO G18GIGA

Go to G18AJ1

WEB [ANY JOB BCWTRP1YEAR=1: [PYEAR] employers/jobs reported earlier:
[List of PYEAR Employers from Section BC]]

Have you already reported about all the jobs that go with this income, including jobs already reported for [PYEAR]?

1. Yes → GO TO G18GIGA
5. No NA → GO TO G18GIGA

Go to G18AJ1

G18AJ1. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

Then I would like to ask you some questions now about the work [you / he / she] did for this income in [PYEAR]. Did [you / he / she] work for the government or a private company?

- If R says Government, PROBE: Is that the federal, state, or local government?
  - 1. Federal government
  - 2. State government
  - 3. Local government
  - 4. Private non-government
  - 5. Self-employed
  - 7. Other - Specify (G18AJ1SPEC. Specify (String 100))

WEB The following questions are about the additional work [you / he / she] did for this income in [PYEAR] that you have not already reported. Did [you / he / she] work for ...?

1. The federal government
2. A state government
3. A local government
4. A private company
5. [Yourself / Himself / Herself] (self-employed)
7. Other - Please specify: (G18AJ1SPEC)

G18AJ2. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

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

WEB What was the name of that employer?

If you prefer not to enter the employer’s name, please enter a nickname or anything that will identify this employer to you.

The information we collect is confidential, and that includes maintaining confidentiality in collecting information about employers.

String 25
**G18AJ3.** *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] ([Respondent])

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

- **DO NOT PROBE**

  String 500

*(WEB)* What sort of work did [you / he / she] do?

String 500

**G18AJ3B.** *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] ([Respondent])

What kind of business or industry was that in?

- **DO NOT PROBE**

  String 500

*(WEB)* What kind of business or industry was that in?

String 500

**G18AJ3C.** *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] ([Respondent])

What was the official title of [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] job? (The title that [your / his / her] employer used.)

- **DO NOT PROBE**

  String 200

*(WEB)* What was the official title of [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] job, that is, the title that [your / his / her] employer used?

String 200

**G18AJ4.** *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] ([Respondent])

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

1–52

*(WEB)* How many weeks did [you / he / she] work at this in [PYEAR]?

1–52

Number of weeks

*CHECK:* Please enter a number from 1 to 52.

**G18AJ5.** *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] ([Respondent])

On average, how many hours a week did [you / he / she] work in [PYEAR]?

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

1–168

*(WEB)* On average, how many hours a week did [you / he / she] work in [PYEAR]?

1–168

Number of hours per week

*CHECK:* Please enter a number from 1 to 168.
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?

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

The month entered is: [G18AJ6MO]

- ENTER the year below

1901 – [PYEAR]  o 9997. Before [PYEAR] but don’t know exact year (SP_0A)

WEB) In what month and year did [you / he / she] start this work?

If you do not know the month, please select the season.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>4. April</td>
<td>10. October</td>
<td>24. Fall (Sep-Nov)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5. May</td>
<td>11. November</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>6. June</td>
<td>12. December</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1901 – [PYEAR]  Year

o 9997. Before [PYEAR] but don’t know exact year (SP_0A)

CHECK: Please enter a date before today.

CHECK: Please enter a year earlier than [CYEAR].

In which months during [PYEAR] [were you / was he / was she] working at it?

- ENTER all that apply
- PROBE: Any others?

Select All  Clear All


WEB) In which months during [PYEAR] [were you / was he / was she] working at it?

Please select all that apply.

Select All  Clear All


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

1. Yes  5. No  ▶ GO TO G18GIGA

GO TO 18AJ9MO

WEB) [Have you / Has he / Has she] stopped this work?

1. Yes  5. No  ▶ GO TO G18GIGA

GO TO 18AJ9MO
G18AJ9MO, G18AJ9YR. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

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?

Select \n

The month entered is: [G18AJ9MO]
- ENTER the year below

[PYEAR] – [CYEAR] 09996. [PYEAR]-[CYEAR], DK which year (SP_0B)

(WEB) In what month and year was that?
If you do not know the month, please select the season.

Select \n

[PYEAR] – [CYEAR] Year 09996. [PYEAR]-[CYEAR] but don’t know which year (SP_0B)

CHECK: Please enter a year from [PYEAR] to [CYEAR].
CHECK: Please enter a date after your start date ([G18J6MO], [G18J6YR]).
CHECK: Please enter a date before today.

G18AJ10. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

What happened – did it go out of business, did [you / he / she] quit, or what?

String 500

(WEB) What happened - did it go out of business, did [you / he / she] quit, or something else?

String 500

Gig Work

G18GIGA. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

Some people find short tasks or jobs through companies that connect them directly with customers using a website, mobile app or online platform. This is sometimes called “gig work.” Does this describe any of the work [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] did in [PYEAR]?

1. Yes 5. No → GO TO G22CKPT

(WEB) Some people find short tasks or jobs through companies that connect them directly with customers using a website, mobile app or online platform. This is sometimes called “gig work.” Does this describe any of the work [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] did in [PYEAR]?

1. Yes 5. No → GO TO G22CKPT

G18GIGC. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

What type of work was this?
- READ LIST
- ENTER all that apply
1. Drive for a ride sharing service, like Uber or Lyft?
2. Deliver purchases using a platform or app, like InstaCart?
3. Provide services for other people using a platform or app, like TaskRabbit?
4. Provide online services using a platform or app, like Mechanical Turk or Upwork?
5. Anything else? Specify (DO NOT READ) (G18GIGCSPEC. Specify. (String 100))

WEB What type of work was this? Please select all that apply.

1. Drive for a ride sharing service, like Uber or Lyft
2. Deliver purchases using a platform or app, like InstaCart
3. Provide services for other people using a platform or app, like TaskRabbit
4. Provide online services using a platform or app, like Mechanical Turk or Upwork
5. Other - Please specify: (G18GIGCSPEC)

G18GIGC1. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
What [1 selection: was/ >1 selection: were] the [1 selection: name / >1 selection: names] of the website, mobile app, or online platform that you used for this work?
Open End

WEB What [1 selection: was/ >1 selection: were] the [1 selection: name / >1 selection: names] of the website, mobile app, or online platform that you used for this work?
Open End

G18GIGB. (CATI) Have you already told me about this work? (Including the jobs we already talked about.)
• [ANY JOB BCWTRP1YEAR=1: If needed, PROBE: Let me remind you of the jobs you reported for [PYEAR] (READ LIST):
  [List of PYEAR Employers from Section BC)]
  
  1. Yes, R reported this work
  5. No, R did not report this work DK/RF

  → GO TO G22CKPT  
  GO TO G18GIGD

WEB) [ANY JOB BCWTRP1YEAR=1: [PYEAR] employers/jobs reported earlier:
  [List of PYEAR Employers from Section BC]] Have you already reported this work, including jobs already reported for [PYEAR]?

  1. Yes  → GO TO G22CKPT
  5. No  NA

  GO TO G18GIGD  GO TO G22CKPT

G18GIGD, G18GIGDPER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
Then I would like to ask you some questions now about the work [you / he / she] did for this income in [PYEAR]. How much did [you / he / she] earn from this work (in [PYEAR])?
• ENTER amount here, then SELECT unit of time on next screen (Hour, Day, Week, Two weeks, Month, Year)

$ 1 – 9,999,997  

DK/RF  → GO TO G18GIGE

↓
The amount entered is: [G18GIGD] per ____
• SELECT the unit of time below

The following questions are about the additional work [you / he / she] did for this income in [PYEAR] that you have not already reported. How much did [you / he / she] earn from this work in [PYEAR]?

$ 1 – 9,999,997.00 per


CHECK: Please enter a number from 1 to 9999997.

7. Other - Please specify: (G18GIGDPERSPEC)

SIGNAL: Please select a unit of time.

G18GIGE. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

During which months of [PYEAR] did [you / he / she] get this income?

- ENTER all that apply
- PROBE: Any others?

Select All  Clear All

WEB During which months of [PYEAR] did [you / he / she] get this income?

Please select all that apply.

Select All  Clear All

G18GIG1. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

Did [you / he / she] work for a private company or were [you / he / she] self-employed?

4. Private non-government
5. Self-employed

7. Other - specify (G18GIGJ1SPEC. Specify (String 100))

WEB Did [you / he / she] work for …?

4. A private company
5. [Yourself / Himself / Herself] (self-employed)

7. Other - Please specify: (G18GIGJ1SPEC)

G18GIGJ1. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

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

WEB What was the name of that employer?

If you prefer not to enter the employer’s name, please enter a nickname or anything that will identify this employer to you.

The information we collect is confidential, and that includes maintaining confidentiality in collecting information about employers.

String 25

G18GIGJ2. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

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

- DO NOT PROBE
What sort of work did [you / he / she] do?

What kind of business or industry was that in?

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

On average, how many hours a week did [you / he / she] work in [PYEAR]?

In what month and year did [you / he / she] start this work?
In which months during [PYEAR] were you / was he / was she working at it?

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

<table>
<thead>
<tr>
<th>Select All</th>
<th>Clear All</th>
</tr>
</thead>
</table>

(WE) In which months during [PYEAR] were you / was he / was she working at it?

Please select all that apply.

<table>
<thead>
<tr>
<th>Select All</th>
<th>Clear All</th>
</tr>
</thead>
</table>

### G18GIGJ8. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

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

1. Yes  5. No → GO TO G22CKPT

GO TO G18GIGJ9MO

(WE) Have you / Has he / Has she stopped this work?

1. Yes  5. No → GO TO G22CKPT

GO TO G18GIGJ9MO

### G18GIGJ9MO, G18GIGJ9YR. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

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?

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

The month entered is: [G18GIGJ9MO]

- **ENTER the year below**

[PYEAR] – [CYEAR] o 9996. [PYEAR]-[CYEAR], DK which year (SP_0B)

(WE) In what month and year was that?

If you do not know the month, please select the season.

|----------|-------|------------|-------|--------------|---------------------|
[PYEAR] – [CYEAR] Year

0 9996. [PYEAR]-[CYEAR] but don’t know which year (SP_0B)

CHECK: Please enter a year from [PYEAR] to [CYEAR].
CHECK: Please enter a date after your start date ([G18GIGJ6MO], [G18GIGJ6YR]).
CHECK: Please enter a date before today.

G18GIGJ10. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
What happened – did it go out of business, did [you / he / she] quit, or what?

String 500

(WEB) What happened - did it go out of business, did [you / he / she] quit, or something else?

String 500

Other Earnings

G22CKPT. CAI Checkpoint: Number of PYEAR Jobs Reported

1. More Than One Job in [PYEAR] 5. All Others → GO TO G25A

G23. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
 Did you include [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s earnings from all of [your / his / her] jobs in [PYEAR] in the amounts we just talked about?

1. Yes → GO TO G25A 5. No

GO TO G24

(WEB) Did you include [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] earnings from ALL of [your / his / her] jobs in [PYEAR] in the amounts you just reported?

1. Yes → GO TO G25A 5. No

GO TO G24

G24. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
 How much did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] earn from (that job/those other jobs) in [PYEAR]?

$ 1 – 9,999,997

(WEB) How much did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] earn from any other jobs in [PYEAR]?

$ 1 – 9,999,997 .00

CHECK: Please enter a number from 1 to 9999997.

Rent

G25A. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
 Did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] receive any (other) income in [PYEAR] from rent?

1. Yes 5. No → GO TO G25B

GO TO G26A

(WEB) Did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] receive any other income in [PYEAR] from rent?

1. Yes 5. No → GO TO G25B

GO TO G26A
G26A, G26APER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
How much was it (in [PYEAR])?
- ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)

$ 1–999,997 DK/RF → GO TO G26A1CKPT

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))

(WEB) How much was it in [PYEAR]?

$ 1–999,997 .00 per 3. Week 4. Two weeks 5. Month 6. Year

CHECK: Please enter a number from 1 to 999997.

SIGNAL: Please select a unit of time.

G26A1CKPT. CAI Checkpoint: Which Loop; Whether Spouse-Partner in FU (CYAQRTH=201-222, CYFUHU=FU, FUMI)

Reference Person Loop 3. Spouse-Partner Loop
1. Spouse-Partner 5. No Spouse-Partner GO TO G26A3CKPT

GO TO G27A

G26A2. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
Does that include [your / [SPOUSE-PARTNER]’s] share (in [PYEAR])?

1. Yes 5. No

(WEB) Does that include [your / [SPOUSE-PARTNER]’s] share in [PYEAR]?

1. Yes 5. No

G26A3CKPT. CAI Checkpoint: Which Loop; Whether Reference Person Reported Rent

Spouse-Partner Loop 2. Reference Person Loop

GO TO G27A

G26A3. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
Is that in addition to the amount you reported for [[REFERENCE PERSON] / yourself] (in [PYEAR])?

1. Yes 5. No

(WEB) Is that in addition to the amount you reported for [[REFERENCE PERSON] / yourself] in [PYEAR]?

1. Yes 5. No

G27A. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
During which months of [PYEAR] did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] get this income?
- ENTER all that apply
- PROBE: Any others?

Select All  Clear All
During which months of [PYEAR] did you / [REFERENCE PERSON] / [SPOUSE-PARTNER] get this income? Please select all that apply.

Select All  Clear All


Dividends

G25B. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] (Respondent)

(Did you / [REFERENCE PERSON] / [SPOUSE-PARTNER] receive any other income in [PYEAR]...) From dividends?

1. Yes  5. No → GO TO G25C
GO TO G26B

(WEB) Did you / [REFERENCE PERSON] / [SPOUSE-PARTNER] receive any other income in [PYEAR] from dividends?

1. Yes  5. No → GO TO G25C
GO TO G26B

G26B, G26BPERSPEC. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] (Respondent)

How much was it (in [PYEAR])?

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

$ 1 – 999,997.00 per

↓

The amount entered is: [G26B] per

• SELECT the unit of time below

5. Month  6. Year  7. Other - Please specify (G26BPERSPEC. Specify. String 100)

(WEB) How much was it in [PYEAR]?

$ 1 – 999,997.00 per

CHECK: Please enter a number from 1 to 999997.

SIGNAL: Please select a unit of time.

G26B1CKPT. CAI Checkpoint: Which Loop; Whether Spouse-Partner in FU (CYAQRTH=201-222, CYFUHU=FU, FUMI)

Reference Person Loop  3. Spouse-Partner Loop

1. Spouse-Partner  5. No Spouse-Partner → GO TO G26B3CKPT
GO TO G27B

G26B2. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] (Respondent)

Does that include your / [SPOUSE-PARTNER]’s dividends (in [PYEAR])?

1. Yes  5. No

(WEB) Does that include your / [SPOUSE-PARTNER]’s dividends in [PYEAR]?

1. Yes  5. No
G26B3.CAI Checkpoint: Which Loop; Whether Reference Person Reported Dividends

<table>
<thead>
<tr>
<th>Spouse-Partner Loop</th>
<th>2. Reference Person Loop</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Reference Person Dividends (G25B[1]=Yes)</td>
<td>GO TO G27B</td>
</tr>
<tr>
<td>3. Reference Person No Dividends (G25B[1]&lt;&gt;Yes)</td>
<td>GO TO G27B</td>
</tr>
</tbody>
</table>

G26B3. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
Is that in addition to the amount you reported for [[REFERENCE PERSON] / yourself] (in [PYEAR])?
1. Yes 5. No

(WEB) Is that in addition to the amount you reported for [[REFERENCE PERSON] / yourself] in [PYEAR]? 1. Yes 5. No

G27B. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
During which months of [PYEAR] did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] get this income?
- ENTER all that apply
- PROBE: Any others?

Select All  Clear All

(WEB) During which months of [PYEAR] did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] get this income? Please select all that apply.

Select All  Clear All

Interest

G25C. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
(Did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] earn any other income in [PYEAR]...)
From interest?
1. Yes 5. No  → GO TO G25D

GO TO G26C

(WEB) Did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] earn any other income in [PYEAR] from interest?
1. Yes 5. No  → GO TO G25D

GO TO G26C

G26C, G26CPER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
How much was it (in [PYEAR])?
- ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)

$ 1 – 999,997  DK/RF  → GO TO G26C1.CKPT

↓
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))

(WEB) How much was it in [PYEAR]?
$ 1 – 999,997 .00 per

CHECK: Please enter a number from 1 to 999997.

7. Other - Please specify: (G26CPERSPEC)

SIGNAL: Please select a unit of time.

G26C1CKPT. CAI Checkpoint: Which Loop; Whether Spouse-Partner in FU (CYAQRTH=201-222, CYFUHU=FU, FUMI)

<table>
<thead>
<tr>
<th>Reference Person Loop</th>
<th>3. Spouse-Partner Loop</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Spouse-Partner</td>
<td>5. No Spouse-Partner</td>
</tr>
</tbody>
</table>

GO TO G26C3CKPT

G26C2. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
Does that include [your / [SPOUSE-PARTNER]'s] interest (in [PYEAR])?
1. Yes  5. No

(WEB) Does that include [your / [SPOUSE-PARTNER]'s] interest in [PYEAR]?
1. Yes  5. No

G26C3CKPT. CAI Checkpoint: Which Loop; Whether Reference Person Reported Interest

<table>
<thead>
<tr>
<th>Spouse-Partner Loop</th>
<th>2. Reference Person Loop</th>
</tr>
</thead>
</table>

GO TO G27C

G26C3. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
Is that in addition to the amount you reported for [[REFERENCE PERSON] / yourself] (in [PYEAR])?
1. Yes  5. No

(WEB) Is that in addition to the amount you reported for [[REFERENCE PERSON] / yourself] in [PYEAR]?
1. Yes  5. No

G27C. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
During which months of [PYEAR] did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] get this income?
• ENTER all that apply
• PROBE: Any others?

Select All  Clear All

(WEB) During which months of [PYEAR] did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] get this income?
Please select all that apply.

Select All  Clear All
Trust Funds and Royalties

G25D. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
(Did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] receive any other income in [PYEAR]...)
From trust funds and royalties?
1. Yes 5. No → GO TO G25E
GO TO G26D

(WEBS) Did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] receive any other income in [PYEAR] from trust funds and royalties?
1. Yes 5. No → GO TO G25E
GO TO G26D

G26D, G26DPER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
How much was it (in [PYEAR])?
• ENTER amount here, then SELECT unit of time on next screen (Month, Year)
$1 – 999,997 DK/RF → GO TO G27D

The amount entered is: [G26D] per ____
• SELECT the unit of time below
5. Month 6. Year 7. Other-specify (G26DPERSPEC. Specify. (String 100))

(WEBS) How much was it in [PYEAR]?
$1 – 999,997 .00 per 5. Month 6. Year
CHECK: Please enter a number from 1 to 999997.
SIGNAL: Please select a unit of time.

G27D. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
During which months of [PYEAR] did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] get this income?
• ENTER all that apply
• PROBE: Any others?
Select All Clear All
(WEBS) During which months of [PYEAR] did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] get this income?
Please select all that apply.
Select All Clear All

Temporary Assistance for Needy Families (TANF)

G25E. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
(Did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] receive any income in [PYEAR]...)
From TANF (Temporary Assistance for Needy Families) [PYSTATE RESIDE<>FC, DK, RF: or [STATEPROG]]?
1. Yes 5. No → GO TO G25F
Did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] receive any income in [PYEAR] from TANF (Temporary Assistance for Needy Families) [PYSTATE<RC, NA; or [STATEPROG]]?

1. Yes  5. No → GO TO G26E

G26E, G26EPER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

How much was it (in [PYEAR])?

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

$ 1 – 999,997 → GO TO G27E

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))

(WEB) How much was it in [PYEAR]?

$ 1 – 999,997 .00 per

CHECK: Please enter a number from 1 to 999997.

SIGNAL: Please select a unit of time.

G27E. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

During which months of [PYEAR] did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] get this income?

- ENTER all that apply

- PROBE: Any others?

Select All  Clear All


(WEB) During which months of [PYEAR] did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] get this income?

Please select all that apply.

Select All  Clear All


G25EE RULE: Number of Current FU Members (CYFUHU=FU, FUMI)

More than One FU Member (COVERSSCREEN.COUNT.FUCOUNT=2-24) Only One FU Member (COVERSSCREEN.COUNT.FUCOUNT=1) → (Assign G27EE=AQSN of FU Member) GO TO G25F

G27E. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

Who in the family was covered by this in [PYEAR]?

- ENTER all that apply

- PROBE: Any others?
Who in your family living there was covered by this in [PYEAR]?
Please select all that apply.

1 – 24. [CYNAMF] [CYNAML] (age [AGEIWDATE])

Supplemental Security Income (SSI)

G25F. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
(For [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] receive any income in [PYEAR]…)

- 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


1. Yes 5. No → GO TO G25G

G25FF. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
(For [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] receive it for [yourself / himself / herself], or for someone else in [PYEAR]?)

1. Self → GO TO G26F 2. Someone else 3. Both → GO TO G26F

G25FFF. (WEB) Did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] receive it in [PYEAR] for…?

1. [Yourself / Himself / Herself] only 2. Someone else only 3. [Yourself / Himself / Herself] and someone else NA

G25FFF. (CATI ONLY) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
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 or Both

Someone Else (G25FF=2) → GO TO G25G  Both (G25FF=3) → G26F

G26F, G26FPER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
How much was [G25FF=SELF: it / ALL OTHERS: the Supplemental Security Income [you / he / she] received for [yourself / himself / herself] in [PYEAR]?

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

$ 1 – 999,997 5. No → GO TO G25G

1. Yes → GO TO G25G

GO TO G25F

The amount entered is: [G26F] per ____
SELECT the unit of time below
5. Month 6. Year 7. Other-specify (G26FPERSPEC. Specify. (String 100))

(WE) $G25FF=BOTh: We’ll ask about the other person’s Supplemental Security Income (SSI) later, during questions about their income.
How much was $G25FF=SELF: it / G25FF=BOTh, NA: the Supplemental Security Income (SSI) [you / he / she] received for [YOURSELF / HIMSELF / HERSELF] in [PYEAR]?
$ 1 – 999,997 .00 per 5. Month 6. Year
CHECK: Please enter a number from 1 to 999997.

SIGNAL: Please select a unit of time.

G27F. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
During which months of [PYEAR] did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] get this income?
• ENTER all that apply
• PROBE: Any others?

Select All Clear All

(WE) During which months of [PYEAR] did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] get this income?
Please select all that apply.

Select All Clear All

Other Welfare

G25G. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
(Did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] receive any income in [PYEAR]…)
From other welfare?
• 1. Yes 5. No → GO TO G31CKPT

GO TO G26G

(WE) Did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] receive any income in [PYEAR] from other welfare?
• 1. Yes 5. No → GO TO G31CKPT

GO TO G26G

G26G, G26GPER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
How much was it (in [PYEAR])?
• ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)

$ 1 – 999,997 DK/RF → GO TO G27G

The amount entered is: [G26G] per ____________
• SELECT the unit of time below

3. Week 4. Two weeks 5. Month 6. Year
7. Other-specify (G26GPPERSPEC. Specify. (String 100))

(WE) How much was it in [PYEAR]?
$1 – 999,997.00 per 3. Week 4. Two weeks 5. Month 6. Year
CHECK: Please enter a number from 1 to 999997.
7. Other - Please specify: (G26GPERSPEC)
SIGNAL: Please select a unit of time.

G27G. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
During which months of [PYEAR] did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] get this income?
- ENTER all that apply
- PROBE: Any others?

Select All Clear All

(WEB) During which months of [PYEAR] did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] get this income?
Please select all that apply.

Select All Clear All

Social Security

G31CKPT. CAI Checkpoint: Whether Spouse-Partner’s Social Security Reported During Reference Person’s Loop

1. Reference Person Loop Spouse-Partner Loop:
   GO TO G37A

G31. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
Did [REFERENCE PERSON LOOP: [you / [REFERENCE PERSON]] [or anyone else in the family there] / SPOUSE-PARTNER LOOP: Did [you / [SPOUSE-PARTNER]] receive any income in [PYEAR] from Social Security, such as disability, retirement or survivor’s benefits?
- [REFERENCE PERSON LOOP: All Social Security received by any FU member must be reported here]

1. Yes 5. No → GO TO G37A

GO TO G32 RULE

(WEB) Did [REFERENCE PERSON LOOP: [you / [REFERENCE PERSON]] [or anyone else in the family there] / SPOUSE-PARTNER LOOP: Did [you / [SPOUSE-PARTNER]] receive any income in [PYEAR] from Social Security, such as disability, retirement or survivor’s benefits?

1. Yes 5. No → GO TO G37A

GO TO G32 RULE

G32 RULE: Number of Current FU Members (CYFUHU=FU, FUMI)

<table>
<thead>
<tr>
<th>Reference Person Loop</th>
<th>Spouse-Partner Loop</th>
</tr>
</thead>
<tbody>
<tr>
<td>More Than One FU Member (COVERSCREEN.COUNT.FUCOUNT=2-24)</td>
<td>Only One FU Member (COVERSCREEN.COUNT.FUCOUNT=1)</td>
</tr>
<tr>
<td>Assign G32=WQWSN</td>
<td>Assign G32=HEADSN</td>
</tr>
</tbody>
</table>
G32. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

Who was that (in [PYEAR])?

- ENTER all that apply
- PROBE: Any others?

1 – 24. [CYNAMF] [CYNAML], [CYAQRTH], [CYFUHU]  AQSN list of RP & SP: FU, FUMI; OFUM: FU, FUMI≤PYEAR, MO≥PYEAR, DECD≥PYEAR  DK/RF

Go to G33A

WEB) Who in your family living there was that in [PYEAR]?
Please select all that apply.

1 – 24. [CYNAMF] [CYNAML] (age [AGEIWDATE])  AQSN list of RP & SP: FU, FUMI; OFUM: FU, FUMI≤PYEAR, MO≥PYEAR, DECD≥PYEAR  NA

Go to G37A


G33A. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

(First / Next,), let me ask about [your / [G32]’s] Social Security in [PYEAR]. 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))

WEB) In [PYEAR], was [YOUR / [G32]’s] Social Security...
Please select all that apply.

6. Dependent of retired recipient  7. Other - Please specify: (G33ASPEC)

G34, G34PER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

How much was the total amount from Social Security? [G33A=2+ SELECTIONS: 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

↓

The amount entered is: [G34] per ____

- SELECT the unit of time below

5. Month  6. Year  7. Other-specify (G34PERSPEC. Specify. (String 100))

WEB) How much was the total amount from Social Security? [G33A=2+ SELECTIONS: Please include all amounts from all types of Social Security [YOU / [G32]] received in [PYEAR].]

$ 1 – 999,997 .00 per

CHECK: Please enter a number from 1 to 999997.

5. Month  6. Year

7. Other - Please specify: (G34PERSPEC)

SIGNAL: Please select a unit of time.
G35. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
During which months of [PYEAR] did [you / [G32]] get this income? [[This includes all types of
Social Security [you / [G32]] received in [PYEAR].]]
• ENTER all that apply
• PROBE: Any others?

Select All  Clear All

(WEB) During which months of [PYEAR] did [you / [G32]] get this income? [G33A=2+ SELECTIONS:
This includes all types of Social Security [you / [G32]] received in [PYEAR].] Please select all that apply.

Select All  Clear All

G35 RULE: Whether More FU Members Reported at G32

More FU Members → REPEAT G33A - G35; Max=24; No More FU Members
Then GO TO G37A

End G33_G35

Veterans Administration (VA) Pensions

G37A. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
Did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] receive any income in [PYEAR] from the Veterans
Administration for a servicemen’s, [MALE CYAQRTH=101, 201, 221: (widow’s,)] / FEMALE CYAQRTH=102, 202,
222: 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 G40

GO TO G38

(WEB) Did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] receive any income in [PYEAR] from the Veterans
Administration? Please select all that apply.
1. Yes, servicemen’s, widow’s, or survivor’s pension
2. Yes, service disability
3. Yes, GI bill
4. Yes, other - Please specify: (G37ASPEC)
5. No, none of the above → GO TO G40

GO TO G38

CHECK: You cannot select "None" with other responses.
G38, G38PER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

How much was the total amount? [G37A=2+ SELECTIONS: Please include all amounts from all types of VA (Veterans 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

↓

The amount entered is: [G38] per ____

- SELECT the unit of time below

5. Month 6. Year 7. Other specify (G38PERSPEC. Specify. (String 100))

(WEB) How much was the total amount? [G37A=2+ SELECTIONS: Please include all amounts from all types of Veterans Administration income [you / he / she] received in [PYEAR].]

$ 1 – 999,997 .00 per

CHECK: Please enter a number from 1 to 999997.

5. Month 6. Year

7. Other - Please specify: (G38PERSPEC)

SIGNAL: Please select a unit of time.

G39. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

During which months of [PYEAR] did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] get this income? [This includes all types of VA (Veterans Administration) income [you / he / she] received in [PYEAR].]

- ENTER all that apply

- PROBE: Any others?

Select All Clear All


(WEB) During which months of [PYEAR] did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] get this income? [G37A=2+ SELECTIONS: This includes all types of Veterans Administration income [you / he / she] received in [PYEAR].]

Please select all that apply.

Select All Clear All


Other Retirement

G40. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

Did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] receive any income in [PYEAR] from other retirement pay, pensions, I.R.A.s (Individual Retirement Account) or annuities?

- ENTER all that apply

- PROBE: Any others?


ASK G41A – G43

GO TO G44A

(WEB) Did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] receive any other retirement income in [PYEAR]?

Please select all that apply.

ASK G41A – G43

CHECK: You cannot select “None” with other responses.
G40=1. Retirement Pay, Pensions

G41A, G41APER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
How much was from retirement pay or pensions (in [PYEAR])?
- ENTER amount here, then SELECT unit of time on next screen (Month, Year)

$ 1 – 999,997 DK/RF → GO TO G42A

↓

The amount entered is: [G41A] per ____
- SELECT the unit of time below

| 5. Month | 6. Year | 7. Other-specified (G41APERSPEC. Specify. (String 100)) |

(WEB) How much was from retirement pay or pensions in [PYEAR]?

$ 1 – 999,997 .00 per 5. Month 6. Year

CHECK: Please enter a number from 1 to 999997.

5. Other - Please specify: (G41APERSPEC)

SIGNAL: Please select a unit of time.

G42A. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
During which months of [PYEAR] did [you / he / she] get this income?
- ENTER all that apply
- PROBE: Any others?

Select All Clear All

(WEB) During which months of [PYEAR] did [you / he / she] get this income?

Please select all that apply.

Select All Clear All

G40=2. Annuities

G41B, G41BPER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
How much was from annuities (in [PYEAR])?
- ENTER amount here, then SELECT unit of time on next screen (Month, Year)

$ 1 – 999,997 DK/RF → GO TO G42B

↓

The amount entered is: [G41B] per ____
- SELECT the unit of time below

| 5. Month | 6. Year | 7. Other-specified (G41BPERSPEC. Specify. (String 100)) |

(WEB) How much was from annuities in [PYEAR]?

$ 1 – 999,997 .00 per 5. Month 6. Year

CHECK: Please enter a number from 1 to 999997.

7. Other - Please specify: (G41BPERSPEC)

SIGNAL: Please select a unit of time.
G42B. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
During which months of [PYEAR] did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] get this income?
• ENTER all that apply
• PROBE: Any others?

Select All Clear All

(WEB) During which months of [PYEAR] did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] get this income?
Please select all that apply.

Select All Clear All

G40=3. Other

G41C, G41CPER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
How much was the other (retirement) income (in [PYEAR])?
• ENTER amount here, then SELECT unit of time on next screen (Month, Year)

$ 1 – 999,997

DK/RF

→ GO TO G41C1

↓

The amount entered is: [G41C] per _____
• SELECT the unit of time below

5. Month 6. Year 7. Other-specify (G41CPERSPEC. Specify. (String 100))

(WEB) How much was the other retirement income in [PYEAR]?

$ 1 – 999,997 .00 per 5. Month 6. Year

CHECK: Please enter a number from 1 to 999997.

7. Other - Please specify: (G41CPERSPEC)

SIGNAL: Please select a unit of time.

G41C1. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
What was that (other retirement income) from (in [PYEAR])?

String 200

(WEB) What was that other retirement income from in [PYEAR]?

String 200
G42C. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
During which months of [PYEAR] did [you / he / she] get this income?
- ENTER all that apply
- PROBE: Any others?

Select All  Clear All

(WEB) During which months of [PYEAR] did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] get this income?
Please select all that apply.
Select All  Clear All

G40=4. IRA

G41D, G41DPER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
How much was from I.R.A.s (Individual Retirement Account) (in [PYEAR])?
- ENTER amount here, then SELECT unit of time on next screen (Month, Year)

$ 1 – 999,997  DK/RF  → GO TO G42D

↓

The amount entered is: [G41D] per ____
- SELECT the unit of time below

5. Month  6. Year  7. Other-specify (G41DPERSPEC. Specify. (String 100))

(WEB) How much was from Individual Retirement Accounts (I.R.A.) in [PYEAR]?

$ 1 – 999,997 .00 per

CHECK: Please enter a number from 1 to 999997.

5. Month  6. Year

7. Other - Please specify: (G41DPERSPEC)

SIGNAL: Please select a unit of time.

G42D. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
During which months of [PYEAR] did [you / he / she] get this income?
- ENTER all that apply
- PROBE: Any others?

Select All  Clear All

(WEB) During which months of [PYEAR] did [you / he / she] get this income?
Please select all that apply.
Select All  Clear All
G43. *(CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

(Not including Veterans Administration pensions,) how many different pensions, I.R.A.s (Individual Retirement Account) or annuities did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] receive income from in [PYEAR]?

- FOR 7 or more, ENTER [7]

1 – 7

*(WEB) Not including Veterans Administration pensions, how many different pensions, Individual Retirement Accounts (I.R.A.), or annuities did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] receive income from in [PYEAR]?

1 – 7 Number of pensions, I.R.A.s, or annuities

CHECK: Please enter a number from 1 to 7.

Unemployment Compensation

G44A. *(CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

Did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] receive any income in [PYEAR] from unemployment compensation?

1. Yes 5. No → GO TO G44B

GO TO G45A

*(WEB) Did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] receive any income in [PYEAR] from unemployment compensation?

1. Yes 5. No → GO TO G44B

GO TO G45A

G45A, G45APER. *(CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

How much was it (in [PYEAR])?

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

$ 1 – 999,997 DK/RF → GO TO G46A

↓

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))

*(WEB) How much was it in [PYEAR]?

$ 1 – 999,997 .00 per

CHECK: Please enter a number from 1 to 999997.

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

7. Other - *Please specify* (G45APERSPEC)

SIGNAL: Please select a unit of time.
G46A. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
During which months of [PYEAR] did you / he / she get this income?
- ENTER all that apply
- PROBE: Any others?

Select All  Clear All

(WEB) During which months of [PYEAR] did you / he / she get this income?
Please select all that apply.
Select All  Clear All

Workers Compensation

G44B. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
(Did you / [REFERENCE PERSON] / [SPOUSE-PARTNER] receive any income in [PYEAR]…)
From workers compensation?
1. Yes  5. No → G44C
GO TO G45B

1. Yes  5. No → G44C
GO TO G45B

G45B, G45BPERS. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
How much was it (in [PYEAR])?
- ENTER amount here, then SELECT unit of time on next screen (Month, Year)

$1 – 999,997.00 DK/RF → GO TO G46B

The amount entered is: [G45B] per ______
- SELECT the unit of time below

5. Month  6. Year  7. Other-specify (G45BPERSPEC. Specify. [String 100])

(WEB) How much was it in [PYEAR]?
$1 – 999,997.00 per ______

CHECK: Please enter a number from 1 to 999997.

5. Month  6. Year  7. Other - Please specify: (G45BPERSPEC)

SIGNAL: Please select a unit of time.
G46B. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
During which months of [PYEAR] did [you / he / she] get this income?

- ENTER all that apply
- PROBE: Any others?

Select All  Clear All

(WEB) During which months of [PYEAR] did [you / he / she] get this income?
Please select all that apply.

Select All  Clear All

Child Support

G44C. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
(Did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] receive any income in [PYEAR]...) From child support?

1. Yes  5. No  → GO TO G44D

GO TO G45C

(WEB) Did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] receive any income in [PYEAR] from child support?

1. Yes  5. No  → GO TO G44D

GO TO G45C

G45C, G45CPER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
How much was it in [PYEAR]?

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

$ 1 – 999,997  DK/RF  → GO TO G46C

↓

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))

(WEB) How much was it in [PYEAR]?

$ 1 – 999,997 .00 per 3. Week  4. Two weeks  5. Month  6. Year

CHECK: Please enter a number from 1 to 999997.

7. Other - Please specify: (G45CPERSPEC)

SIGNAL: Please select a unit of time.

G46C. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
During which months of [PYEAR] did [you / he / she] get this income?

- ENTER all that apply
- PROBE: Any others?

Select All  Clear All
(WEB) During which months of [PYEAR] did [you / he / she] get this income? Please select all that apply.

Select All  Clear All


Alimony or Separate Maintenance

G44D. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

(Did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] receive any income in [PYEAR]...)
From alimony or separate maintenance?

1. Yes  5. No → GO TO G44E

GO TO G45D

(WEB) Did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] receive any income in [PYEAR] from alimony or separate maintenance?

1. Yes  5. No → GO TO G44E

GO TO G45D
G45D, G45DPER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
How much was it (in [PYEAR])?
- ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)
  $ 1 – 999,997 DK/RF → GO TO G46D
  ↓
  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))

(WEB) How much was it in [PYEAR]?
  $ 1 – 999,997 .00 per 3. Week 4. Two weeks 5. Month 6. Year
  CHECK: Please enter a number from 1 to 999997.
  7. Other - Please specify: (G45DPERSPEC)
  SIGNAL: Please select a unit of time.

G46D. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
During which months of [PYEAR] did [you / he / she] get this income?
- ENTER all that apply
- PROBE: Any others?

Select All Clear All

(WEB) During which months of [PYEAR] did [you / he / she] get this income?
Please select all that apply.
Select All Clear All

Help From Relatives

G44E. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
Did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] receive any help in [PYEAR] from relatives?
- This must be from non-FU members.
  1. Yes 5. No → GO TO G44F

GO TO G45E

(WEB) Did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] receive any help in [PYEAR] from relatives?
Please do not include amounts from relatives living with you.
  1. Yes 5. No → GO TO G44F

GO TO G45E
G45E, G45EPER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
How much was it in [PYEAR]? 
- ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)
  $ 1 – 999,997 DK/RF → GO TO G46E
  ↓
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))

WEB) How much was it in [PYEAR]?
$ 1 – 999,997 .00 per  3. Week  4. Two weeks  5. Month  6. Year
CHECK: Please enter a number from 1 to 999997.
SIGNAL: Please select a unit of time.

G46E. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
During which months of [PYEAR] did [you / he / she] get this income?
- ENTER all that apply
- PROBE: Any others?
Select All  Clear All

WEB) During which months of [PYEAR] did [you / he / she] get this income?
Please select all that apply.
Select All  Clear All

Help From Non-Relatives

G44F. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
 Did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] receive any help in [PYEAR] from non-relatives or friends?
- This must be from non-FU members.
  1. Yes  5. No → GO TO G44G
GO TO G45F

WEB) Did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] receive any help in [PYEAR] from non-relatives or friends?
Please do not include amounts from anyone living with you.
  1. Yes  5. No → GO TO G44G
GO TO G45F
G45F, G45FPER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

How much was it (in [PYEAR])?

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

$ 1 – 999,997.00 per

↓

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))

(Web) How much was it in [PYEAR]?

$ 1 – 999,997.00 per 3. Week 4. Two weeks 5. Month 6. Year

CHECK: Please enter a number from 1 to 999997.

SIGNAL: Please select a unit of time.

G46F. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

During which months of [PYEAR] did [you / he / she] get this income?

- ENTER all that apply
- PROBE: Any others?

Select All Clear All


(Web) During which months of [PYEAR] did [you / he / she] get this income?

*Please select all that apply.*

Select All Clear All


Other Income

G44G. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

Did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] receive any other income in [PYEAR] from anything else?

1. Yes 5. No → GO TO R1CKPT

GO TO G45G1

(Web) Did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] receive any other income in [PYEAR] from anything else?

1. Yes 5. No → GO TO R1CKPT

GO TO G45G1
G45G1. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
What was that from in [PYEAR]?
- **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? (DO NOT PROBE)
  - **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

(WEB) What was that from in [PYEAR]?
If this income comes from a job, please tell us: the type of work done, start (and end) dates, job title, round-trip commute time, the number of weeks worked in [PYEAR], and the average number of hours per week worked in [PYEAR].

Open End

G45G, G45GPER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
How much was the income from that (in [PYEAR])?
- **ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)**

$ 1 – 999,997.00 per 

**GO TO G46G**

The amount entered is: [G45G] per 

- **SELECT the unit of time below**
  - 3. Week
  - 4. Two weeks
  - 5. Month
  - 6. Year
  - 7. Other - Please specify: (G45GPERSPEC. Specify. (String 100))

(WEB) How much was the income from that in [PYEAR]?

$ 1 – 999,997.00 per 

**CHECK:** Please enter a number from 1 to 999997.

**SIGNAL:** Please select a unit of time.

G46G. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
During which months of [PYEAR] did [you / he / she] get this income?
- **ENTER all that apply**
- **PROBE:** Any others?

Select All  Clear All


(WEB) During which months of [PYEAR] did [you / he / she] get this income?

Please select all that apply.
P2Year Income

R1CKPT. CAI Checkpoint: Whether Worked in P2YEAR

1. Worked in P2YEAR (BCWTRP2YEAR=1 for Any Job) → GO TO G49 RULE

↓

R2, R2PER. (CAI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[(Respondent)]

Earlier you reported that [you were / [REFERENCE PERSON] was / [SPOUSE-PARTNER] 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.

(Including the jobs we already talked about)

• [ANY JOB BCWTRP2YEAR=1: If needed, PROBE: Let me remind you of the jobs reported for [P2YEAR] (READ LIST):
  [List of P2YEAR Employers from Section BC)]

• 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)

$ 1.00 – 9,999,997.00 per

DK/RF → GO TO G49 RULE

↓

The amount entered is: [R2] per _____

• SELECT the unit of time below


  7. Other-specify (R2PERSPEC. Specify. (String 100))

(WE) [ANY JOB BCWTRP2YEAR=1: [P2YEAR] employers/job reported earlier:

[List of P2YEAR Employers from Section BC)]

Earlier you reported that [you were / [REFERENCE PERSON] was / [SPOUSE-PARTNER] 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.

$ 1.00 – 9,999,997.00 per

CHECK: Please enter a number from 1.0 to 9999997.00.

7. Other - Please specify: (R2PERSPEC)

SIGNAL: Please select a unit of time.

G49 RULE: Whether Spouse-Partner in FU (CYAQRTH=201-222, CYFUHU=FU, FUMI)

Spouse-Partner → REPEAT G12 - R2PER; No Spouse-Partner

↑

Then GO TO G73CKPT

End G12_G46G
OFUM Age 16+ PYear Income

G73CKPT[1..24]. CAI Checkpoint: Section G Big OFUM Qualifier [1..24]=AQSNOFUM

<table>
<thead>
<tr>
<th>16+ Year Old FU Member (AGEIWDATE=16-120 or AGEGE16=YES):</th>
<th>5. All Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. OFUM is FU, or FUMI before CYEAR (CYAQRTH=301-882 or 951-982 &amp; CYFUHU=FU or (CYFUHU=FUMI &amp; MI-YR&lt;CYR))</td>
<td>GO TO G90BCKPT</td>
</tr>
<tr>
<td>2. OFUM Was FU Last Wave and Became MO, INST or DIED in PYEAR or Later (CYAQRTH=301-882 or 951-982 &amp; PYFUHU=FU &amp; CYFUHU=MO, DIED, INST &amp; MO-YR&gt;P2YR)</td>
<td></td>
</tr>
<tr>
<td>3. RP or SP Was FU Last Wave &amp; Became MO, INST or DIED in PYEAR or Later (CYAQRTH=101-222 &amp; PYFUHU=FU &amp; CYFUHU=MO, DIED, INST &amp; MO-YR&gt;P2YR)</td>
<td></td>
</tr>
</tbody>
</table>

SECTION_G.G73_G90[1..24] [1..24]=AQSNOFUM

G73. AQSNOFUM; Assigned

G74 RULE: Whether FU Member Deceased

| Deceased (CYFUHU=7) | GO TO G76 | All Others |

Jobs and Earnings

G75. (CATI) [CYNCFAMF] [CYNAMF]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [Respondent]

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

- If R says “Unemployed/Not working”, PROBE: [Are you / Is he / Is 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, including serving in the military
2. Only temporarily laid off or on sick or maternity leave
3. Looking for work, unemployed
4. Retired
5. Permanently or temporarily disabled
6. Keeping house
7. A student
8. Other-specify (G75SPEC. Specify (String 100))

CHECK for 1, 2 selected with 3: "Working now" or "Temporarily laid off" cannot be selected with "Unemployed (looking or not looking)".

WEB These next questions are about [you / CYNAMF] [CYNAML] (age [AGEIWDATE]). [Are you / Is he / Is she]…?

Please select all that apply.

If [you are / he is / she is] employed and currently working, please select “Working now, including serving in the military”.

If [you are / he is / she is] employed but currently on maternity or sick leave, or laid off for any reason, please select “Employed, but temporarily laid off or on sick or maternity leave”.

If [you are / he is / she is] unemployed, please tell us whether [you are / he is / she is] looking for work or not looking for work.

1. Working now, including serving in the military
2. Employed, but temporarily laid off or on sick or maternity leave
3. Unemployed and looking for work
4. Unemployed and not looking for work

8. Other - Please specify: (G75SPEC)

CHECK for 1, 2 selected with 3, 9: "Working now" or "Temporarily laid off" cannot be selected with "Unemployed (looking or not looking)".

CHECK for 3 and 9 selected together: "Unemployed and looking" cannot be selected with "Unemployed and not looking"

G76. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] ([Respondent])

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  DK/RF

GO TO G77  GO TO G83

WEB) [FU MEMBER DECEASED]: These next questions are about [CYNAMF] [CYNAML]. During [PYEAR], how many full-time or part-time jobs did [you / he / she] have, not counting work around the house?

5. None  → GO TO G83  1. One job  2. Two jobs  3. Three jobs  4. Four jobs  NA  → GO TO G83

GO TO G77


G77. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] ([Respondent])

[First / Second / Third / Fourth] Job

[JOBS 2-4: (For the next 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]
•  DO NOT PROBE

String 500


String 500

SIGNAL for NA: This information is important. Please enter a response.

G77A RULE: Whether First Job Loop (Main Job)

First Job Loop  All Others  → GO TO G78

↓
G77A. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

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]
• DO NOT PROBE

String 200

(WEB) [G76=1: What / G76=2-4: On [your / his / her] MAIN job, what was the official title of [your / his / her] job, that is, the title that [your / his / her] employer used?]

String 200

SIGNAL for NA: This information is important. Please enter a response.

G77B. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

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]

1 – 900

| 996 | Do not work at same location every day (SP_0B) |
| 997 | There is no commute time (VOL) (SP_0A) |
| 995 | Uses temporary lodging near work (VOL) (SP_0C) |

(WEB) [G76=1: On / G76=2-4: On [your / his / her] MAIN job, on] a typical day, how many minutes is [your / his / her] round trip commute to and from work?

1 – 900

| 996 | Do not work at same location every day (SP_0B) |
| 997 | There is no commute time (VOL) (SP_0A) |
| 995 | Uses temporary lodging near work (VOL) (SP_0C) |

CHECK: Please enter a number from 1 to 900.

G78, G78PER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

[First / Second / Third / Fourth] Job

About how much money did [you / he / she] earn from that job last year ([PYEAR])?

• [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)

$ 1.00 – 9,999,997.00 DK/RF → GO TO G79

↓

The amount entered is: [G78] per ______

• SELECT the unit of time below

  7. Other-specify (G78PERSPEC. Specify. (String 100))

(WEB) [G76=1: About / G76=2-4: On [your / his / her] [LOOP 1: MAIN / LOOP 2: SECOND / LOOP 3: THIRD / LOOP 4: FOURTH:] job, about] how much did [you / he / she] earn from that job last year ([PYEAR])?

$ 1.00 – 9,999,997.00 per

CHECK: Please enter a number from 1.0 to 9999997.00.

SIGNAL: Please select a unit of time.
G79. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
[First / Second / Third / Fourth] Job
About how many weeks did [you / he / she] work on that job last year ([PYEAR])?
• [1st JOB AND G76=2-4: R reported multiple jobs -- ask for the main job here]
  1 – 52

(WEB) [G76=1: About / G76=2-4: On [your / his / her] [LOOP 1: MAIN / LOOP 2: SECOND / LOOP 3: THIRD / LOOP 4: FOURTH:] job, about] how many weeks did [you / he / she] work last year ([PYEAR])?
  1 – 52  Number of weeks
CHECK: Please enter a number from 1 to 52.

G80. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
[First / Second / Third / Fourth] Job
During which months was that (in [PYEAR])?
• [1st JOB AND G76=2-4: R reported multiple jobs -- ask for the main job here]
• ENTER all that apply
• PROBE: Any others?

<table>
<thead>
<tr>
<th>Select All</th>
<th>Clear All</th>
</tr>
</thead>
</table>

(WEB) During which months was that in [PYEAR]?
Please select all that apply.

<table>
<thead>
<tr>
<th>Select All</th>
<th>Clear All</th>
</tr>
</thead>
</table>

G81. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
[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 (in [PYEAR])?
• [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 – 168

(WEB) [G76=1: During / G76=2-4: On [your / his / her] [LOOP 1: MAIN / LOOP 2: SECOND / LOOP 3: THIRD / LOOP 4: FOURTH:] job, during] the weeks that [you / he / she] worked, about how many hours did [you / he / she] usually work per week in [PYEAR]?
  1 – 168  Number of hours per week
CHECK: Please enter a number from 1 to 168.

G82 RULE: Whether More Jobs at G76

More Jobs  → REPEAT G77 - G81; Max=4;  No More Jobs
Then GO TO G83

End G77_G81
Other Income

G83. (CAT) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] ((Respondent))
Did [you / he / she] have any [other] income, such as pensions, welfare, interest, gifts, or anything else, last year ([PYEAR])?

1. Yes  5. No → GO TO G88CKPT

GO TO G84

(WEB) Did [you / he / she] have any other income, such as pensions, welfare, interest, gifts, or anything else, last year ([PYEAR])?

1. Yes  5. No → GO TO G88CKPT

GO TO G84

G84. (CAT) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] ((Respondent))

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.
- “Help from relatives” must be from non-FU members.

1. Interest  2. TANF/[STATEPROG]  3. SSI  4. Welfare
11. Help from relatives  12. Other-specify → DK/RF → GO TO G88CKPT

ASK G84A–G84M3

(WEB) What was that from?

Please select all that apply.
Please do not include amounts from relatives living with you.

1. Interest  2. TANF/[STATEPROG]
11. Help from relatives  12. Other → NA → GO TO G88CKPT

ASK G84A–G84M3
G84=1. Interest

G84A, G84APER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

How much was from interest (in [PYEAR])?

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

$ 1 – 999,997 DK/RF \rightarrow \text{GO TO G84AA}

\downarrow

The amount entered is: [G84A] per ____

- SELECT the unit of time below

5. Month 6. Year 7. Other-specify (G84APERSPEC. Specify. (String 100))

(WEB) How much was from interest in [PYEAR]?

$ 1 – 999,997 .00 per 5. Month 6. Year

CHECK: Please enter a number from 1 to 999997.

SIGNAL: Please select a unit of time.

G84AA. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

During which months of [PYEAR] did [you / he / she] get this income?

- ENTER all that apply
- PROBE: Any others?

Select All Clear All


(WEB) During which months of [PYEAR] did [you / he / she] get this income?

Please select all that apply.

Select All Clear All


G84=2. TANF

G84B, G84BPER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

How much was from TANF (Temporary Assistance for Needy Families) [PYSTATERESIDE<>FC, DK, RF, NA: or [STATEPROG]] (in [PYEAR])?

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

$ 1 – 999,997 DK/RF \rightarrow \text{GO TO G84BB}

\downarrow

The amount entered is: [G84B] per ____

- SELECT the unit of time below

4. Two weeks 5. Month 6. Year 7. Other-specify (G84BPERSPEC. Specify. (String 100))

(WEB) How much was from TANF (Temporary Assistance for Needy Families) [PYSTATERESIDE<>FC, DK, RF, NA: or [STATEPROG]] in [PYEAR]?

$ 1 – 999,997 .00 per 4. Two weeks 5. Month 6. Year

CHECK: Please enter a number from 1 to 999997.

SIGNAL: Please select a unit of time.
G84BB. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

During which months of [PYEAR] did [you / he / she] get this income?

- ENTER all that apply
- PROBE: Any others?

<table>
<thead>
<tr>
<th>Select All</th>
<th>Clear All</th>
</tr>
</thead>
</table>

*(WEB)* During which months of [PYEAR] did [you / he / she] get this income?

*Please select all that apply.*

<table>
<thead>
<tr>
<th>Select All</th>
<th>Clear All</th>
</tr>
</thead>
</table>

G84BBB. *(CATI)* [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: FU, FUMi≤PY, MO≥PY, DEC≥PY, MIL, EDU, HLT, OTH

*(WEB)* Who in your family living there was covered by this?

*Please select all that apply.*

1 – 24. [CYNAMF] [CYNAML] (age [AGEIWDATE])

AQSN list of FU Members: FU, FUMi≤PY, MO≥PY, DEC≥PY, MIL, EDU, HLT, OTH

G84=3. SSI

G84C1. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

Did [you / he / she] receive the SSI for [yourself / himself / herself], or for someone else (in [PYEAR])?

- 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 → GO TO G84C4

GO TO G84C2

*(WEB)* in [PYEAR] did [you / he / she] receive the Supplemental Security Income (SSI) for...?

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. [Yourself / Himself / Herself] only → GO TO G84C4  
2. Someone else only → GO TO NEXT G84 ITEM / G88CKPT  
3. [Yourself / Himself / Herself] and someone else → GO TO G84C4

G84C2. *(CATI ONLY)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

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 or Both

Someone Else (G84C1=2) → GO TO Next G84 Item, or G88CKPT

Both (G84C1=3) ▼

G84C4, G84C4PER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

How much was [G84C1=SELF: it / ALL OTHERS: the Supplemental Security Income [you / he / she] received for [yourself / himself / herself]] (in [PYEAR])?

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

$ 1 – 999,997 DK/RF → GO TO G84C5

▼

The amount entered is: [G84C4] per _____
- SELECT the unit of time below

5. Month 6. Year 7. Other-specify (G84C4PERSPEC. Specify. (String 100))

(WEB) [G84C1=BOTH: We’ll ask about the other person’s Supplemental Security Income (SSI) later, during questions about their income.]

How much was [G84C1=SELF: it / G84C1=BOTH, NA: the Supplemental Security Income (SSI)] [you / he / she] received for [YOURSELF / HIMSELF / HERSELF] in [PYEAR]?

$ 1 – 999,997 .00 per 5. Month 6. Year

CHECK: Please enter a number from 1 to 999997.

SIGNAL: Please select a unit of time.

G84C5. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

During which months of [PYEAR] did [you / he / she] get this income?

- ENTER all that apply
- PROBE: Any others?

Select All  Clear All


(WEB) During which months of [PYEAR] did [you / he / she] get this income?

Please select all that apply.

Select All  Clear All

G84=4. Other Welfare

G84D, G84DPER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
How much was from welfare (in [PYEAR])?
- ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)

$1 – 999,997  DK/RF \rightarrow \text{GO TO G84DD}

\downarrow

The amount entered is: [G84D] per ____
- SELECT the unit of time below

3. Week 4. Two weeks 5. Month 6. Year
7. Other-specified (G84DPERSPEC. Specify. (String 100))

(WEB) How much was from other welfare in [PYEAR]?

$1 – 999,997 .00 per

CHECK: Please enter a number from 1 to 999997.

SIGNAL: Please select a unit of time.

G84DD. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
During which months of [PYEAR] did [you / he / she] get this income?
- ENTER all that apply
- PROBE: Any others?

Select All Clear All


(WEB) During which months of [PYEAR] did [you / he / she] get this income?
Please select all that apply.

Select All Clear All


G84=5. Social Security

G84ECKPT. CAI Checkpoint: Whether Social Security Already Reported For This OFUM at G32

1. Not Reported 5. Already Reported \rightarrow \text{GO TO Next G84 Item; or G88CKPT}

G84E2A. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
What was the Social Security (in [PYEAR])? Was that disability, retirement, survivor’s benefits or what?
- ENTER all that apply
- PROBE: Any others?

6. Dependent of retired recipient 7. Other-specified (G84E2ASPEC. Specify. (String 100))

(WEB) What was the Social Security in [PYEAR]?
Please select all that apply.

6. Dependent of retired recipient 7. Other - Please specify: (G84E2ASPEC)
G84E3, G84E3PER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] ([Respondent])
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

The amount entered is: [G84E3] per ____
• SELECT the unit of time below

5. Month 6. Year 7. Other-specify (G84E3PERSPEC. Specify. (String 100))

(GWEB) How much was the total amount from Social Security? [G84E2A=2+ SELECTIONS: Please include all amounts from all types of Social Security [you / he / she] received in [PYEAR].]

$1 – 999,997
CHECK: Please enter a number from 1 to 999997.

5. Month 6. Year

7. Other - Please specify: (G84E3PERSPEC)

SIGNAL: Please select a unit of time.

G84E4. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] ([Respondent])
During which months of [PYEAR] did [you / he / she] get this income? [(This includes all types of Social Security [you / he / she] received in [PYEAR].)]
• ENTER all that apply
• PROBE: Any others?

Select All  Clear All


(GWEB) During which months of [PYEAR] did [you / he / she] get this income? [G84E2A=2+ SELECTIONS: This includes all types of Social Security [you / he / she] received in [PYEAR].]

Please select all that apply.

Select All  Clear All


G84=6. Veterans benefits

G84F, G84FPER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] ([Respondent])
How much was from veteran’s benefits (in [PYEAR])?
• ENTER amount here, then SELECT unit of time on next screen (Month, Year)
• If needed: This includes all types of VA (Veterans Administration) income [you / he / she] received in [PYEAR].

$1 – 999,997
DK/RF → GO TO G84FF

The amount entered is: [G84F] per ____
• SELECT the unit of time below

5. Month 6. Year 7. Other-specify (G84FPERSPEC. Specify. (String 100))

(GWEB) How much was from veteran’s benefits in [PYEAR]?

$1 – 999,997
CHECK: Please enter a number from 1 to 999997.

5. Month 6. Year

7. Other - Please specify: (G84FPERSPEC)

SIGNAL: Please select a unit of time.
G84FF. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[(Respondent)]
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 (Veterans Administration) income [you / he / she] received in [PYEAR].

Select All  Clear All

(WEB) During which months of [PYEAR] did [you / he / she] get this income?
Please select all that apply.
Select All  Clear All

G84=7. Pensions, annuities

G84G, G84GPER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[(Respondent)]
How much was from pensions or annuities (in [PYEAR])?
- ENTER amount here, then SELECT unit of time on next screen (Month, Year)

$ 1 – 999,997  DK/RF  → GO TO G84GG
↓
The amount entered is: [G84G] per ____
- SELECT the unit of time below
5. Month  6. Year  7. Other-specify (G84GPERSPEC. Specify. (String 100))

(WEB) How much was from pensions or annuities in [PYEAR]?
$ 1 – 999,997  .00 per  5. Month  6. Year
CHECK: Please enter a number from 1 to 999997.
7. Other - Please specify: (G84GPERSPEC)
SIGNAL: Please select a unit of time.

G84GG. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[(Respondent)]
During which months of [PYEAR] did [you / he / she] get this income?
- ENTER all that apply
- PROBE: Any others?

Select All  Clear All

(WEB) During which months of [PYEAR] did [you / he / she] get this income?
Please select all that apply.
Select All  Clear All
G84=8. Unemployment compensation

G84H, G84HPER. (CATI) [CYNAMF], [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] ([Respondent])
How much was from unemployment compensation [PYEAR]?
- ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)

$1 – 999,997  DK/RF  → GO TO G84HH

↓
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)

(WEB) How much was from unemployment compensation in [PYEAR]?

$1 – 999,997  .00 per 3. Week 4. Two weeks 5. Month 6. Year
CHECK: Please enter a number from 1 to 999997.
SIGNAL: Please select a unit of time.

G84HH. (CATI) [CYNAMF], [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] ([Respondent])
During which months of [PYEAR] did [you / he / she] get this income?
- ENTER all that apply
- PROBE: Any others?

Select All  Clear All

(WEB) During which months of [PYEAR] did [you / he / she] get this income?
Please select all that apply.

Select All  Clear All

G84=9. Workers compensation

G84J, G84JPER. (CATI) [CYNAMF], [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] ([Respondent])
How much was from worker’s compensation [PYEAR]?
- ENTER amount here, then SELECT unit of time on next screen (Month, Year)

$1 – 999,997  DK/RF  → GO TO G84J

↓
The amount entered is: [G84J] per ____
- SELECT the unit of time below

5. Month 6. Year
7. Other-specify (G84JPERSPEC. Specify. String 100)

(WEB) How much was from worker’s compensation in [PYEAR]?

$1 – 999,997  .00 per 5. Month 6. Year
CHECK: Please enter a number from 1 to 999997.
SIGNAL: Please select a unit of time.
G84JJ. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
During which months of [PYEAR] did [you / he / she] get this income?
- ENTER all that apply
- PROBE: Any others?

Select All Clear All

(Web) During which months of [PYEAR] did [you / he / she] get this income?
Please select all that apply.
Select All Clear All

G84=10. Child support

G84K, G84KPER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
How much was from child support (in [PYEAR])?
- ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)

$ 1 – 999,997 DK/RF → GO TO G84KK

The amount entered is: [G84K] per ______
- SELECT the unit of time below
3. Week 4. Two weeks 5. Month 6. Year
7. Other-specify (G84KPERSPEC. Specify. (String 100))

(Web) How much was from child support in [PYEAR]?
$ 1 – 999,997 .00 per
CHECK: Please enter a number from 1 to 999997.

7. Other - Please specify: (G84KPERSPEC)
SIGNAL: Please select a unit of time.

G84KK. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
During which months of [PYEAR] did [you / he / she] get this income?
- ENTER all that apply
- PROBE: Any others?

Select All Clear All

(Web) During which months of [PYEAR] did [you / he / she] get this income?
Please select all that apply.
Select All Clear All
G84=11. Help from relatives

G84L, G84LPER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

How much was received from relatives (in [PYEAR])?
- This must be from non-FU members
- ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)

$ 1 – 999,997 → GO TO G84LL

The amount entered is: [G84L] per ____
- SELECT the unit of time below
  3. Week  4. Two weeks  5. Month  6. Year

7. Other-specify (G84LPERSPEC. Specify. (String 100))

WEB How much was received from relatives in [PYEAR]?
Please do not include amounts from relatives living with you.

$ 1 – 999,997 .00 per

CHECK: Please enter a number from 1 to 999997.

SIGNAL: Please select a unit of time.

G84LL. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

During which months of [PYEAR] did [you / he / she] get this income?
- ENTER all that apply
- PROBE: Any others?

Select All  Clear All

WEB During which months of [PYEAR] did [you / he / she] get this income?
Please select all that apply.

Select All  Clear All
G84=12. Other income

G84M. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
What was that other income from (in [PYEAR])?
- 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? (DO NOT PROBE)
  - 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

(WEB) What was that other income from in [PYEAR]?
If this income comes from a job, please tell us: the type of work done, start (and end) dates, job title, round-trip commute time, the number of weeks worked in [PYEAR], and the average number of hours per week worked in [PYEAR].

Open End

G84MM, G84MMPER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
How much was that from that (other income) (in [PYEAR])?
- ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)

$ 1 – 999,997  DK/RF → GO TO G84M3

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))

(WEB) How much was it in [PYEAR]?  
$ 1 – 999,997 .00 per  
CHECK: Please enter a number from 1 to 999997.
SIGNAL: Please select a unit of time.

G84M3. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
During which months of [PYEAR] did [you / he / she] get this income?
- ENTER all that apply
- PROBE: Any others?

Select All  Clear All

(WEB) During which months of [PYEAR] did [you / he / she] get this income?  
Please select all that apply.

Select All  Clear All
### New OFUM Age 16-49 Education

G88CKPT. CAI Checkpoint: Whether Big OFUM is New, or Returning and Reported Education Last Wave

<table>
<thead>
<tr>
<th>Returning OFUM</th>
<th>New OFUM</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Age &lt;50 &amp; Education Reported (CYFUHU=FU, INST &amp; AGEIWDATE &lt;50, DK, RF, NA &amp; OFUMGREC=1 &amp; [IWTYPE= REINT, SO])</td>
<td>4. Age 50+ (CYFUHU=FU, INST &amp; AGEIWDATE = 50-120)</td>
</tr>
<tr>
<td>2. Deceased (CYFUHU=DIED)</td>
<td>5. Age &lt;50 (CYFUHU=FU, INST &amp; AGEIWDATE &lt;50, DK, RF, NA &amp; OFUMGREC=0)</td>
</tr>
<tr>
<td>GO TO G88N</td>
<td>GO TO G90A RULE</td>
</tr>
<tr>
<td>GO TO G88LCKPT</td>
<td>GO TO G90A RULE</td>
</tr>
</tbody>
</table>

### SECTION_G.G73_G90[1..24].G88AG88M3 [1..24]=AQN of FU Member

G88A. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[(Respondent)]]

Where did [you / [CYNAMF] [CYNAML]] 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 the United States and outside the United States  
5. Had no education

- RF

GO TO G88B1  
GO TO G88LCKPT  
GO TO G88B1  
GO TO G88LCKPT

(WEB) Where did [you / [CYNAMF] [CYNAML]] receive [your / her / his] education?

1. United States only  
2. Outside United States only  
3. Both in the United States and outside the United States  
5. Had no education

NA

GO TO G88B1

G88B1. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[(Respondent)]]

Now I would like to talk about the education [you have / he has / she has] received. Did [you / he / she] graduate from high school, get a GED, or neither?

- ENTER [3] if R says OFUM is still in school (attending grade 1-12) or working on a GED

1. Graduated from high school  
2. Got a GED  
3. Neither

DK/RF

GO TO G88B2MO  
GO TO G88C1  
GO TO g88e1  
GO TO G88F1

(WEB) Did [you / she / he] graduate from high school, get a GED, or neither?

1. Yes, graduated from high school  
2. Yes, received a GED  
3. No, neither

NA

GO TO G88B2MO  
GO TO G88C1  
GO TO G88E1  
GO TO G88F1
G88B2MO, G88B2YR. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

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


(In what month and year did [you / he / she] graduate?)
- The month entered is: [G88BMO]
- ENTER the year below

1920 – [CYEAR] ➔ GO TO G88F1

(WEB) In what month and year did [you / he / she] graduate?
If you do not know the month, please select the season.


1920 – [CYEAR] Year

GO TO G88F1

CHECK: Please enter a date before today.

G88C1. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

What was the highest grade [you / he / she] completed prior to getting [your / her / his] GED?
- Record last grade finished prior to receiving GED

0. None 1. First grade 3. Third grade
GO TO G88D1MO

4. Fourth grade 5. Fifth grade 6. Sixth grade

10. Tenth grade 11. Eleventh grade
GO TO G88C2MO

(WEB) What was the highest grade [you / he / she] completed in school prior to getting [your / her / his] GED?

0. None 1. First grade 3. Third grade
GO TO G88D1MO

4. Fourth grade 5. Fifth grade 6. Sixth grade

10. Tenth grade 11. Eleventh grade
NA ➔ GO TO G88D1MO

GO TO G88C2MO
G88C2MO, G88C2YR. (CATI) [CYANMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

In what month and year did [you / he / she] complete [G88C1]?
- SELECT Month and [Enter] to go to next screen for year
- IF NECESSARY: What would be your best estimate?

Select ▼

(In what month and year did [you / he / she] complete [G88C1]?)
The month entered is: [G88C2MO]
- ENTER the year below
1920 – [CYEAR]

(WEB) In what month and year did [you / he / she] complete [G88C1]?
If you do not know the month, please select the season.

Select ▼  Month or

(1920 – [CYEAR]) Year
CHECK: Please enter a date before today.

G88D1MO, G88D1YR. (CATI) [CYANMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

In what month and year did [you / he / she] receive [your / her / his] GED?
- SELECT Month and [Enter] to go to next screen for year
- IF NECESSARY: What would be your best estimate?

Select ▼  Month or

(In what month and year did [you / he / she] receive [your / her / his] GED?)
The month entered is: [G88D1MO]
- ENTER the year below
1920 – [CYEAR] → GO TO G88F1

(WEB) In what month and year did [you / he / she] receive [your / her / his] GED?
If you do not know the month, please select the season.

Select ▼  Month or

(1920 – [CYEAR]) Year
GO TO G88F1

CHECK: Please enter a date before today.
What was the highest grade [you / he / she] completed in school?

- Record last grade finished
  - 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

GO TO G88F1

WEB What was the highest grade [you/he/she] completed in school?

- 0. None
- 1. First grade
- 2. Second grade
- 3. Third grade

GO TO G88F1

G88E2MO, G88E2YR. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

In what month and year did [you / he / she] complete [G88E1]?

- IF NECESSARY: What would be your best estimate?

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

  Select V
  1. January
  2. February
  3. March
  4. April
  5. May
  6. June
  7. July
  8. August
  9. September
  10. October
  11. November
  12. December
  21. Winter (Dec-Feb)
  22. Spring (Mar-May)
  23. Summer (Jun-Aug)
  24. Fall (Sep-Nov)

(In what month and year did [you / he / she] complete [G88E1]?)
The month entered is: [G88E2MO]

- ENTER the year below

1920 – [CYEAR]

WEB In what month and year did [you / he / she] complete [G88E1]?
If you do not know the month, please select the season.

Select V
Month or Season
1. January
2. February
3. March
4. April
5. May
6. June
7. July
8. August
9. September
10. October
11. November
12. December
21. Winter (Dec-Feb)
22. Spring (Mar-May)
23. Summer (Jun-Aug)
24. Fall (Sep-Nov)

1920 – [CYEAR] Year

CHECK: Please enter a date before today.

G88F1. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

Did [you / he / she] attend college?

1. Yes
5. No → GO TO G88LCKPT

GO TO G88F2MO

WEB Did [you / he / she] attend college?

1. Yes
5. No → GO TO G88LCKPT

GO TO G88F2MO
G88F2MO, G882FYR. (**CATI**) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] ([Respondent])

In what month and year did [you / he / she] last attend college?
- If R says "still in school", ENTER Don't Know here and ENTER Still in School on the Year screen
- SELECT Month and [Enter] to go to next screen for year
- NECESSARY: What would be your best estimate?

Select ✗
- 1. January
- 2. February
- 3. March
- 4. April
- 5. May
- 6. June
- 7. July
- 8. August
- 9. September
- 10. October
- 11. November
- 12. December
- 21. Winter (Dec-Feb)
- 22. Spring (Mar-May)
- 23. Summer (Jun-Aug)
- 24. Fall (Sep-Nov)

(In what month and year did [you / he / she] last attend college?)
The month entered is: [G88F2MO]
- ENTER the year below

1920 – [CYEAR] 0 9996. Still in school (SP_0B)

(WEB) In what month and year did [you / he / she] last attend college?
If you do not know the month, please select the season.

Select ✗
- Month or Season
- 1. January
- 2. February
- 3. March
- 4. April
- 5. May
- 6. June
- 7. July
- 8. August
- 9. September
- 10. October
- 11. November
- 12. December
- 21. Winter (Dec-Feb)
- 22. Spring (Mar-May)
- 23. Summer (Jun-Aug)
- 24. Fall (Sep-Nov)

1920 – [CYEAR] Year
0 9996. Still in school (SP_0B)

CHECK: Please enter a date before today.

G88G. (**CATI**) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] ([Respondent])

What is the highest year of college [you have / he has / she has] completed?
- IF R gives a degree: How many years of college [have you / has he / has she] completed?
  - We’ll talk about any college degrees [you have / he has / she 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
- DK/RF

GO TO G88LCKPT

4. Four years
- 5. Five years or more
- NA

GO TO G88H1

(WEB) What is the highest year of college [you have / have / he has / she has] completed?

0. Less than one year
- 1. One year
- 2. Two years
- 3. Three years
- 4. Four years
- 5. Five years or more
- NA

GO TO G88H1

G88H1. (**CATI**) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] ([Respondent])

Did [you / he / she] receive a college degree?

1. Yes
5. No
GO TO G88LCKPT

GO TO G88H2

(WEB) Did [you / he / she] receive a college degree?

1. Yes
5. No
GO TO G88LCKPT

GO TO G88H2
G88H2. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[(Respondent)]]

What is the highest college degree [you have / he has / she has] received?

- **PROBE for the highest degree received**

  1. Associate’s degree (AA)
  2. Bachelor’s degree (BA/BS)
  3. Master’s degree (MA, MS, MBA)
  4. Doctorate (PhD)
  5. Law Degree (LLB, JD)
  6. Medical degree (MD, DDS, DVM, DO)
  7. Honorary degree
  8. Other - Please specify: (G88H2SPEC. Specify (String 100))

GO TO G88J

GO TO G88H3

*(WEB)* What is the highest college degree [you have / he has / she has] received?

1. Associate’s degree (AA)
2. Bachelor’s degree (BA/BS)
3. Master’s degree (MA, MS, MBA)
4. Doctorate (PhD)
5. Law Degree (LLB, JD)
6. Medical degree (MD, DDS, DVM, DO)
7. Honorary degree
8. Other - Please specify: (G88H2SPEC)

GO TO G88J

GO TO G88H3

G88H3. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[(Respondent)]]

What was [your / her / his] major or majors 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

*(WEB)* What was [your / her / his] major or majors at the college or university from which [you / he / she] received [your / his / her] BACHELOR’S degree?

String 100

G88H4. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[(Respondent)]]

What was the name of the college or university?

- **If needed**: What was the name of the college or university from which [you / he / she] received [your / her / his] bachelor’s degree?

  String 100

*(WEB)* What was the name of the college or university from which [you / he / she] received [your / her / his] BACHELOR’S degree?

String 100
G88H5COUNTRY (G88H5CTRYNAME), G88H5CITY, G88H5STATE (G88H5STABBR).

(CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE]

(Respondent)

Where was it located? (In what country was that?)

- If needed: In what country was the college or university from which
  [you / she / he] received [your / her / his] bachelor's degree?
- ENTER [185 UNITED STATES] for Puerto Rico, U.S. Virgin Islands, Guam, American Samoa or the Northern Mariana Islands

Select ▼ 1 – 193 (Defaults to 185/US)

(In what city was that?)

- If needed: In what city was the college or university from which [you / he / she] received [your / her / his] bachelor's degree?

String 100

(In what state was that?) (For COUNTRY=185)

- If needed: In what state was the college or university from which [you / he / she] received [your / her / his] bachelor's degree?

Select ▼ 1 – 57 (Assigned 57/FC if Country<>185)

(WEB) Where was the college or university from which [you / he / she] received [your / her / his] BACHELOR'S degree?

Country

United States includes Puerto Rico, U.S.
Virgin Islands, Guam, American Samoa
and the Northern Mariana Islands

Select ▼ 1 – 193 (Defaults to 185/US)

City

State

Select ▼ 1 – 57 (Assigned 57/FC if Country<>185)
G88H6MO, G88H6YR. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] *(Respondent)*

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?

<table>
<thead>
<tr>
<th>Select</th>
<th>Month or Season</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐</td>
<td>January</td>
</tr>
<tr>
<td>☐</td>
<td>February</td>
</tr>
<tr>
<td>☐</td>
<td>March</td>
</tr>
<tr>
<td>☐</td>
<td>April</td>
</tr>
<tr>
<td>☐</td>
<td>May</td>
</tr>
<tr>
<td>☐</td>
<td>June</td>
</tr>
<tr>
<td>☐</td>
<td>July</td>
</tr>
<tr>
<td>☐</td>
<td>August</td>
</tr>
<tr>
<td>☐</td>
<td>September</td>
</tr>
<tr>
<td>☐</td>
<td>October</td>
</tr>
<tr>
<td>☐</td>
<td>November</td>
</tr>
<tr>
<td>☐</td>
<td>December</td>
</tr>
<tr>
<td>☐</td>
<td>Winter (Dec-Feb)</td>
</tr>
<tr>
<td>☐</td>
<td>Spring (Mar-May)</td>
</tr>
<tr>
<td>☐</td>
<td>Summer (Jun-Aug)</td>
</tr>
<tr>
<td>☐</td>
<td>Fall (Sep-Nov)</td>
</tr>
</tbody>
</table>

(In what month and year did [you / he / she] receive [your / his / her] bachelor’s degree?)

The month entered is: [G88H6MO]

- **ENTER the year below**

1920 – [CYEAR]

*(WEB)* In what month and year did [you / he / she] receive [your / his / her] BACHELOR’S degree?

*If you do not know the month, please select the season.*

<table>
<thead>
<tr>
<th>Select</th>
<th>Month or Season</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐</td>
<td>January</td>
</tr>
<tr>
<td>☐</td>
<td>February</td>
</tr>
<tr>
<td>☐</td>
<td>March</td>
</tr>
<tr>
<td>☐</td>
<td>April</td>
</tr>
<tr>
<td>☐</td>
<td>May</td>
</tr>
<tr>
<td>☐</td>
<td>June</td>
</tr>
<tr>
<td>☐</td>
<td>July</td>
</tr>
<tr>
<td>☐</td>
<td>August</td>
</tr>
<tr>
<td>☐</td>
<td>September</td>
</tr>
<tr>
<td>☐</td>
<td>October</td>
</tr>
<tr>
<td>☐</td>
<td>November</td>
</tr>
<tr>
<td>☐</td>
<td>December</td>
</tr>
<tr>
<td>☐</td>
<td>Winter (Dec-Feb)</td>
</tr>
<tr>
<td>☐</td>
<td>Spring (Mar-May)</td>
</tr>
<tr>
<td>☐</td>
<td>Summer (Jun-Aug)</td>
</tr>
<tr>
<td>☐</td>
<td>Fall (Sep-Nov)</td>
</tr>
</tbody>
</table>

1920 – [CYEAR]

Year

*CHECK: Please enter a date before today.*

G88J. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] *(Respondent)*

[G88H2]

*(And)* What was [your / her / his] [G88H2=BACHELORS: major or majors / 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

*(WEB)* What was [your / her / his] [G88H2=BACHELORS: major or majors / ALL OTHERS: area of study] at the college or university from which [you / he / she] received [your / his / her] HIGHEST degree?

String 100

G88K1. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] *(Respondent)*

[G88H2]

What was the name of the college or university?

- **If needed:** What was the name of the college or university from which [you / he / she] received [your / her / his] highest degree?

String 100

*(WEB)* What was the name of the college or university from which [you / he / she] received [your / her / his] HIGHEST degree?

String 100
Where was it located? (In what country was that?)

- If needed: In what country was the college or university from which [you / she / he] received [your / her / his] bachelor’s degree?
  - ENTER [185 UNITED STATES] for Puerto Rico, U.S. Virgin Islands, Guam, American Samoa or the Northern Mariana Islands

Select 1 – 193 (Defaults to 185/US)

(In what city was that?)

- If needed: In what city was the college or university from which [you / he / she] received [your / her / his] highest degree?

String 100

(In what state was that?) (For COUNTRY=185)

- If needed: In what state was the college or university from which [you / he / she] received [your / her / his] highest degree?

Select 1 – 57 (Assigned 57/FC if Country<>185)

WEB Where was the college or university from which [you / he / she] received [your / his / her] highest degree?

Country Select 1 – 193 (Defaults to 185/US)

United States includes Puerto Rico, U.S. Virgin Islands, Guam, American Samoa and the Northern Mariana Islands

State Select 1 – 57 (Assigned 57/FC if Country<>185)

In what month and year did [you / he / she] receive [your / his / her] highest degree?

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


The month entered is: [G88K3MO]

- ENTER the year below

1920 – [CYEAR]

WEB In what month and year did [you / he / she] receive [your / his / her] HIGHEST degree?

If you do not know the month, please select the season.


1920 – [CYEAR] Year

CHECK: Please enter a date before today.
G88LCKPT. CAI Checkpoint: Where OFUM Educated

1. Outside U.S. (G88A=2, 3)  3. U.S. Only (G88A=1, DK)  5. All Others (G88A=5, RF, NA)

↓

GO TO G88M2CKPT  GO TO G90A RULE

G88L. (CAI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
How many years of school did [you / he / she] complete outside of the U.S.?

1 – 25

(WEB) How many years of school did [you / he / she] complete outside of the U.S.?

1 – 25  Number of years

CHECK: Please enter a number from 1 to 25.

G88M1. (CAI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
What was the highest degree or certificate [you / he / she] earned outside the U.S.?

String 100

(WEB) What was the highest degree or certificate [you / he / she] earned outside the U.S.?

String 100

G88M2CKPT. CAI Checkpoint: Whether OFUM Still in School

1. Still in School (G88F2MO=96 or G88F2YR=9996)  → GO TO G88M3  5. All Others

↓

G88M2. (CAI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
Are you / Is he / Is she currently 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

GO TO G88M3

(WEB) Are you / Is he / Is she currently 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

GO TO G88M3
Earlier you said you are / CYNAMF is still in school. What grade or year are you / is he / is she currently attending?

<table>
<thead>
<tr>
<th>Grade or Year</th>
<th>1. First grade</th>
<th>2. Second grade</th>
<th>3. Third grade</th>
<th>4. Fourth grade</th>
<th>5. Fifth grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>11. Eleventh grade</td>
<td>12. 12th grade or working toward GED</td>
<td>13. 1st year of college (freshman)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>14. 2nd year of college (sophomore)</td>
<td>15. 3rd year of college (junior)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16. 4th year of college (senior)</td>
<td>17. 5th year of college or higher</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18. Post-graduate work</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

GO TO G90A RULE

Earlier you reported that you are / CYNAMF is still in school. What grade or year are you / is he / is she currently attending?

<table>
<thead>
<tr>
<th>Grade or Year</th>
<th>1. First grade</th>
<th>2. Second grade</th>
<th>3. Third grade</th>
<th>4. Fourth grade</th>
<th>5. Fifth grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>11. Eleventh grade</td>
<td>12. 12th grade or working toward GED</td>
<td>13. 1st year of college (freshman)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>14. 2nd year of college (sophomore)</td>
<td>15. 3rd year of college (junior)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16. 4th year of college (senior)</td>
<td>17. 5th year of college or higher</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18. Post-graduate work</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

GO TO G90A RULE
Since our last interview on [PYIWDATE], where did [you / [CYNAMF] [CYNAML]] 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 outside  
DK  RF  → GO TO G88AACKPT

Since [PYIWDATE], where did [you / [CYNAMF] [CYNAML]] receive [your / her / his] education?

1. United States only  
2. Outside United States only  
3. Both in the United States and outside the United States  
NA  → GO TO G88AACKPT

Since [PYI WDATE], did [you / he / she] graduate from high school, get a GED, or neither?

1. Graduated from high school  
2. Got a GED  
3. Neither  
DK/RF  → GO TO G88T1

Since your last interview on [PYIWDATE], did [you / he / she] graduate from high school, get a GED, or neither?

1. Yes, graduated from high school  
2. Yes, received a GED  
3. No, neither  
NA  → GO TO G88T1
In what month and year did [you / he / she] graduate?
• If needed: Between our last interview on [PYIWDATE] and now
• SELECT Month and [Enter] to go to next screen for year
• IF NECESSARY: What would be your best estimate?


(In what year did [you / he / she] graduate?)
• If needed: Between our last interview on [PYIWDATE] and now
• The month entered is: [G88P2MO]
• ENTER the year below

Select  [P2YEAR] – [CYEAR]

GO TO G88T1

WEB) In what month and year did [you / he / she] graduate between your last interview on [PYIWDATE] and now?
If you do not know the month, please select the season.

4. April  10. October  24. Fall (Sep-Nov)
5. May  11. November
6. June  12. December

Select  Year [P2YEAR] – [CYEAR]

GO TO G88T1

CHECK: Please enter a date before today.

G88Q1. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
What was the highest grade [you / he / she] completed prior to getting [your / her / his] GED?
• Record last grade finished prior to receiving GED

0. None  1. First grade  2. Second grade  3. Third grade
GO TO G88R1MO
4. Fourth grade  5. Fifth grade  6. Sixth grade
10. Tenth grade  11. Eleventh grade

GO TO G88R1MO

WEB) How many grades of regular school did [you/he/she] finish prior to getting [your/his/her] GED?
Regular school includes high school and schooling that leads to a college or professional school degree.

0. None  1. First grade  2. Second grade  3. Third grade
GO TO G88R1MO
4. Fourth grade  5. Fifth grade  6. Sixth grade
10. Tenth grade  11. Eleventh grade

GO TO G88Q2MO
In what month and year did you complete [G88Q1]?

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


The month entered is: [G88Q2MO]

ENTER the year below: [CYEAR]

(If you do not know the month, please select the season.)

Select ▼

4. April 10. October 24. Fall (Sep-Nov)
5. May 11. November
6. June 12. December

CHECK: Please enter a date before today.
G88R1MO, G88R1YR. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDAT] [(Respondent)]

In what month and year did [you / he / she] receive [your / her / his] GED?
- If needed: Between our last interview on [PYIWDATE] and now
- SELECT Month and [Enter] to go to next screen for year
- IF NECESSARY: What would be your best estimate?

Select V

<p>| | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
</table>

(In what month and year did [you / he / she] receive [your / her / his] GED?)
- If needed: Between our last interview on [PYIWDATE] and now

The month entered is: [G88R1MO]
- ENTER the year below

Select V [P2YEAR] – [CYEAR]

GO TO G88T1

(WEB) In what month and year did [you / he / she] receive [your / her / his] GED between your last interview on [PYIWDATE] and now?
If you do not know the month, please select the season.

Select V Month or Season

<p>| | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
</table>

Select V Year [P2YEAR] – [CYEAR]

GO TO G88T1

CHECK: Please enter a date before today.

G88S1. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDAT] [(Respondent)]

What was the highest grade [you / he / she] completed in school?
- Record last grade finished

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

DK/RF -> GO TO G88T1

GO TO G88S2MO

(WEB) What was the highest grade [you / she / he] completed in school?

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

NA -> GO TO G88T1

GO TO G88S2MO
G88S2MO, G88S2YR. (CATI) [CYNAMF] [CYAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

In what month and year did [you / he / she] complete [G88S1]?

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

Select

- 1. January
- 2. February
- 3. March
- 4. April
- 5. May
- 6. June
- 7. July
- 8. August
- 9. September
- 10. October
- 11. November
- 12. December
- 21. Winter (Dec-Feb)
- 22. Spring (Mar-May)
- 23. Summer (Jun-Aug)
- 24. Fall (Sep-Nov)

The month entered is: [G882SMO]

- ENTER the year below

1920 – [CYEAR]

WEB) In what month and year did [you / he / she] complete [G88S1]?

If you do not know the month, please select the season.

Select

- 1. January
- 2. February
- 3. March
- 4. April
- 5. May
- 6. June
- 7. July
- 8. August
- 9. September
- 10. October
- 11. November
- 12. December
- 21. Winter (Dec-Feb)
- 22. Spring (Mar-May)
- 23. Summer (Jun-Aug)
- 24. Fall (Sep-Nov)

1920 – [CYEAR] Year

CHECK: Please enter a date before today.

G88T1. (CATI) [CYNAMF] [CYAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

Did [you / he / she] attend college between [PYIWDATE] and now?

1. Yes 5. No → GO TO G88VCKPT

GO TO G88T2MO

CHECK for G88T1<>YES & PYPERSINFO.COMPEDC=12-17: IWER: R reported that [CYNAMF] [CYAML] attended school since [PYIWDATE], and we know from previous waves that [CYNAMF] [CYAML] has already graduated high school or received a GED. Please VERIFY with whether this person attended college since [PYIWDATE]: If R says NO or DK/RF, then SELECT GoTo to go back to G88N and ENTER [5] or [DK, RF]. If R says YES, then SELECT Close and ENTER [1].

WEB) Did [you / he / she] attend college between [PYIWDATE] and now?

1. Yes 5. No → GO TO G88VCKPT

GO TO G88T2MO
G88T2MO, G88T2YR.  (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE]  
([Respondent])

In what month and year did [you / he / she] last attend college?
- If needed: Between our last interview on [PYIWDATE] and now
- If R says "still in school", ENTER Don’t Know here and ENTER Still in School on the Year screen
- SELECT Month and [Enter] to go to next screen for year
- NECESSARY: What would be your best estimate?

   Select  

(In what month and year did [you / he / she] last attend college?)
- If needed: Between our last interview on [PYIWDATE] and now

The month entered is: [G88T2MO]  
- ENTER the year below

   Select  
   [P2YEAR] – [CYEAR]; 9996. Still in school

WEB) In what month and year did [you / he / she] last attend college between [PYIWDATE] and now?
If you do not know the month, please select the season.

   Select  

   Select  
   Year  [P2YEAR] – [CYEAR]; 9996. Still in school

CHECK: Please enter a date before today.

G88VCKPT. CAI Checkpoint: Whether OFUM Attended College since Last Wave

<table>
<thead>
<tr>
<th>1. Attended College (G88T1=Yes)</th>
<th>Did Not Attend College (G88T1&lt;&gt;Yes)</th>
</tr>
</thead>
<tbody>
<tr>
<td>3. Preloaded Education&lt;&gt;Response (PYPERSINFO.COMPEDUC=DK, RF, NA)</td>
<td>5. Preloaded Education=Response (PYPERSINFO.COMPEDUC=0-17)</td>
</tr>
</tbody>
</table>

GO TO G88AACKPT

G88V. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE]  
([Respondent])

Altogether, what is the highest year of college [you have / he has / she has] completed?
- IF R gives a degree: How many years of college [have you / has he / has she] completed altogether? We’ll talk about any college degrees [you have / he has / she has] earned next.
- [G88VCKPT=3: ENTER [0] if R says None or Never attended college]

<table>
<thead>
<tr>
<th>0. Less than one year</th>
<th>1. One year</th>
<th>2. Two years</th>
<th>3. Three years</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO G88AACKPT</td>
<td>4. Four years</td>
<td>5. Five years or more</td>
<td>DK/RF</td>
</tr>
</tbody>
</table>

GO TO G88WCKPT

WEB) ALTOGETHER, what is the highest year of college [you have / he has / she has] completed?  
Please select “Less than one year” if this person never attended college

<table>
<thead>
<tr>
<th>0. Less than one year</th>
<th>1. One year</th>
<th>2. Two years</th>
<th>3. Three years</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO G88AACKPT</td>
<td>4. Four years</td>
<td>5. Five years or more</td>
<td>NA</td>
</tr>
</tbody>
</table>

GO TO G88WCKPT
G88WCKPT. CAI Checkpoint: Whether OFUM Attended College since Last Wave

<table>
<thead>
<tr>
<th>1. Attended College (G88T1=Yes)</th>
<th>5. Did Not Attend College (G88T1&lt;&gt;Yes)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

GO TO G88AACKPT

G88W. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)] Did [you / he / she] receive a college degree between [PYIWDATE] and now?

<table>
<thead>
<tr>
<th>1. Yes</th>
<th>5. No</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>GO TO G88AACKPT</td>
</tr>
</tbody>
</table>

GO TO G88X1

(WEB) Did [you / he / she] receive a college degree between [PYIWDATE] and now?

<table>
<thead>
<tr>
<th>1. Yes</th>
<th>5. No</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>GO TO G88AACKPT</td>
</tr>
</tbody>
</table>

GO TO G88X1

G88X1. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)] (Since our last interview on [PYIWDATE],) what college degree did [you / he / she] receive?

- If needed: Between our last interview on [PYIWDATE],) what college degree did [you / he / she] receive?
- If more than one degree, PROBE for the highest degree received since [PYIWDATE]

<table>
<thead>
<tr>
<th>1. Associate’s degree (AA)</th>
<th>3. Master’s degree (MA, MS, MBA)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Bachelor’s degree (BA/BS)</td>
<td>4. Doctorate (PhD)</td>
</tr>
<tr>
<td></td>
<td>5. Law Degree (LLB, JD)</td>
</tr>
<tr>
<td></td>
<td>6. Medical degree (MD, DDS, DVM, DO)</td>
</tr>
<tr>
<td></td>
<td>8. Honorary degree</td>
</tr>
<tr>
<td></td>
<td>97. Other-specify (G88X1SPEC, Specify (String 100))</td>
</tr>
</tbody>
</table>

GO TO G88Y

(WEB) Between [PYIWDATE] and now, what college degree did [you / he / she] receive?

<table>
<thead>
<tr>
<th>1. Associate’s degree (AA)</th>
<th>3. Master’s degree (MA, MS, MBA)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Bachelor’s degree (BA/BS)</td>
<td>4. Doctorate (PhD)</td>
</tr>
<tr>
<td></td>
<td>5. Law Degree (LLB, JD)</td>
</tr>
<tr>
<td></td>
<td>6. Medical degree (MD, DDS, DVM, DO)</td>
</tr>
<tr>
<td></td>
<td>8. Honorary degree</td>
</tr>
<tr>
<td></td>
<td>97. Other - Please specify: (G88X1SPEC)</td>
</tr>
</tbody>
</table>

GO TO G88Y

GO TO G88X2
G88X2. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
What was [your / her / his] major or majors 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

(WEB) What was [your / her / his] major or majors at the college or university from which [you / he / she] received [your / his / her] BACHELOR’S degree?

String 100

G88X3. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
What was the name of the college or university?
• If needed: What was the name of the college or university from which [you / he / she] received [your / her / his] bachelor’s degree?

String 100

(WEB) What was the name of the college or university from which [you / he / she] received [your / his / her] BACHELOR’S degree?

String 100

G88X4COUNTRY (G88X4CTRNAME), G88X4CITY, G88X4STATE (G88X4STABBR).
(CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
Where was it located? (In what country was that?)
• If needed: In what country was the college or university from which [you / he / she] received [your / her / his] bachelor’s degree?
• ENTER [185 UNITED STATES] for Puerto Rico, U.S. Virgin Islands, Guam, American Samoa or the Northern Mariana Islands

Select 1 – 193 (Defaults to 185/US)

(In what city was that?)
• If needed: In what city was the college or university from which [you / he / she] received [your / her / his] bachelor’s degree?

String 100

(In what state was that?) (For COUNTRY=185)
• If needed: In what state is the college or university from which [you / he / she] received [your / her / his] bachelor’s degree?

Select 1 – 57 (Assigned 57/FC if Country<>185)

(WEB) Where was the college or university from which [you / he / she] received [your / her / his] BACHELOR’S degree?

Country

Select 1 – 193 (Defaults to 185/US)

United States includes Puerto Rico, U.S. Virgin Islands, Guam, American Samoa and the Northern Mariana Islands

City

String 100

State

Select 1 – 57 (Assigned 57/FC if Country<>185)
G88X5MO, G88X5YR. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
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?

Select  
4. April  10. October  24. Fall (Sep-Nov)
5. May  11. November
6. June  12. December

(In what month and year did [you / he / she] receive [your / his / her] bachelor’s degree)?
The month entered is: [G88X4MO]
- ENTER the year below

1920 – [CYEAR]

(WEB) In what month and year did [you / he / she] receive [your / his / her] BACHELOR’S degree?
If you do not know the month, please select the season.

Select  
4. April 12. December  24. Fall (Sep-Nov)
8. August

1920 – [CYEAR] Year
CHECK: Please enter a date before today.

G88Y. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)] [G88X1]
(And) What was [your / her / his] [G88X1=BACHELORS: major or majors / ALL OTHERS: area of study] at the college or university from which [you / he / she] received [your / his / her] highest degree since our last interview on [PYIWDATE]?
- Probe for details and dual majors

String 100

(WEB) What was [your / her / his] [G88X1=BACHELORS: major or majors / ALL OTHERS: area of study] at the college or university from which [you / he / she] received [your / his / her] HIGHEST degree since your last interview on [PYIWDATE]?
String 100
G88Z1. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)] [G88X1]

What was the name of the college or university?

- If needed: What was the name of the college or university from which [you / he / she] received [your / her / his] highest degree (since our last interview on [PYIWDATE])?

| String 100 |

(WEB) What was the name of the college or university from which [you / he / she] received [your / his / her] HIGHEST degree since [PYIWDATE]?

| String 100 |

G88Z2COUNTRY (G88Z2CTRYNAME), G88Z2CITY, G88Z2STATE (G88Z2STABBR).

(CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)] [G88X1]

Where was it located? (In what country was that?)

- If needed: In what country was the college or university from which [you / she / he] received [your / her / his] bachelor’s degree?
- ENTER [185 UNITED STATES] for Puerto Rico, U.S. Virgin Islands, Guam, American Samoa or the Northern Mariana Islands

| Select \(\checkmark\) 1 – 193 (Defaults to 185/US) |

(In what city was that?)

- If needed: In what city was the college or university from which [you / he / she] received [your / her / his] highest degree (since our last interview on [PYIWDATE])?

| String 100 |

(In what state was that?) (For \(\text{COUNTRY}=185\))

- If needed: In what state is the college or university from which [you / he / she] received [your / her / his] highest degree (since our last interview on [PYIWDATE])?

| Select \(\checkmark\) 1 – 57 (Assigned 57/FC if \(\text{Country}<185\)) |

(WEB) Where was the college or university from which [you / he / she] received [your / her / his] HIGHEST degree since [PYIWDATE]?

Country

| Select \(\checkmark\) 1 – 193 (Defaults to 185/US) |

United States includes Puerto Rico, U.S. Virgin Islands, Guam, American Samoa and the Northern Mariana Islands

City

| String 100 |

State

| Select \(\checkmark\) 1 – 57 (Assigned 57/FC if \(\text{Country}<185\)) |
G88Z3MO, G88Z3YR. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent) [G88X1]
In what month and year did [you / he / she] receive [your / her / his] highest degree?

- If needed: Between our last interview on [PYIWDATE] and now
- SELECT Month and [Enter] to go to next screen for year
- IF NECESSARY: What would be your best estimate?


(In what month and year did [you / he / she] receive [your / her / his] highest degree)?
- If needed: Between our last interview on [PYIWDATE] and now
The month entered is: [G88Z3MO]
- ENTER the year below


(The month entered is: [G88Z3MO])

WEB) In what month and year did [you / he / she] receive [your / his / her] HIGHEST degree since [PYIWDATE]?
If you do not know the month, please select the season.

or 2. February 8. August 22. Spring (Mar-May)
4. April 10. October 24. Fall (Sep-Nov)
5. May 11. November
6. June 12. December

WEB) In what month and year did [you / he / she] receive [your / his / her] HIGHEST degree since [PYIWDATE]?
If you do not know the month, please select the season.

or 2. February 8. August 22. Spring (Mar-May)
4. April 10. October 24. Fall (Sep-Nov)
5. May 11. November
6. June 12. December

CHECK: Please enter a date before today.

G88AACKPT. CAI Checkpoint: Where OFUM Educated

1. Outside U.S. (G88O=2, 3) 3. U.S. Only (G88O=1, DK) 5. All Others (G88O=RF, NA)

GO TO G88CCCKPT GO TO G90A RULE

G88AA. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
Between [PYIWDATE] and now, how many years of school did [you / he / she] complete outside of the U.S.?

1. One year 2. Two years 3. Three years

(WEB) Between [PYIWDATE] and now, how many years of school did [you / he / she] complete outside of the United States?

1. One year 2. Two years 3. Three years

G88BB. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
Between [PYIWDATE] and now, what was the highest degree or certificate [you / he / she] earned outside the U.S.?

String 100

(WEB) Between [PYIWDATE] and now, what was the highest degree or certificate [you / he / she] earned outside the United States?

String 100
G88CCCKPT. CAI Checkpoint: Whether OFUM Still in School

1. Still in School (G88N=2 or G88T2MO=96 or G88T2YR=9996) → GO TO G88DD  5. All Others

G88CC. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

[Are you / is he / is she] currently 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

GO TO G88DD

(WEB) [Are you / is he / is she] currently 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

GO TO G88DD

G88DD. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

[G88CCCKPT=STILL IN SCHOOL: Earlier you said [you are / CYNAMF] is] still in school.

What grade or year [are you / is he / is she] currently attending?

11. Eleventh grade  12. 12th grade or working toward GED  13. 1st year of college (freshman)
14. 2nd year of college (sophomore)  15. 3rd year of college (junior)
16. 4th year of college (senior)  17. 5th year of college or higher
18. Post-graduate work

(WEB) [G88M2CKPT=STILL IN SCHOOL: Earlier you reported that [you are / CYNAMF] is] still in school.

What grade or year [are you / is he / is she] currently attending?

11. Eleventh grade  12. 12th grade or working toward GED  13. 1st year of college (freshman)
14. 2nd year of college (sophomore)  15. 3rd year of college (junior)
16. 4th year of college (senior)  17. 5th year of college or higher
18. Post-graduate work

End G88NG88DD

G90A RULE: Whether There are More Big OFUMs

More Big OFUMs → REPEAT G73 - G88DD; Max=24; No More Big OFUMs Then GO TO G90BCKPT

End G73_G90
### OFUM Age<16 PYear Income

**G90BCKPT[1..24]. CAI Checkpoint: Section G Little OFUM Qualifier [1..24]= AQSN of FU Member**

<table>
<thead>
<tr>
<th>&lt;16 Year Old FU Member (AGEIWDATE&lt;16 or AGEGE16=No)</th>
<th>5. All Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. OFUM is FU, or is FUMI Before CYEAR (CYAQRTH=301-882 or 951-982 &amp; (CYFUHU=FU or (CYFUHU=FUMI &amp; MI-YR&lt;CYR)))</td>
<td>GO TO G99</td>
</tr>
<tr>
<td>2. OFUM was FU, FUMI Last Wave and Became MO, INST, DIED in PYEAR or Later (CYAQRTH=301-882 or 951-982 &amp; (PYFUHU=FU &amp; CYFUHU=MO, DIED, INST &amp; MO-YR&gt;P2YR))</td>
<td></td>
</tr>
</tbody>
</table>

### SECTION_G.G90D_G97[1..24] [1..24]=AQSN of FU Member

**G90D. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]**

**[LOOP 1: Now the younger member(s) of your family.]**
Did [CYNAMF] [CYNAML] have any income in [PYEAR]?

<table>
<thead>
<tr>
<th>1. Yes</th>
<th>5. No</th>
</tr>
</thead>
</table>

GO TO G98 RULE

**G92. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]**

Now, we would like to ask about [CYNAMF] [CYNAML]'s income in [PYEAR]. 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.

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

ASK G94A – G94F3

**WEB** The next questions are about [CYNAMF]’s ([CYNAML] age [AGEIWDATE]) income in [PYEAR]. What was that from?

*Please select all that apply.*

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

ASK G94A – G94F3
G92 = 1. Work

G94A, G94APER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

How much was from work (in [PYEAR])?

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

$ 1.00 – 9,999,997.00 DK/RF → GO TO G94AA

The amount entered is: [G94A] per ____

- SELECT the unit of time below


7. Other-specified (G94APERSPEC. Specify. (String 100))

WEB How much was from work in [PYEAR]?

$ 1.00 – 9,999,997.00 per 3. Week 4. Two weeks 5. Month 6. Year

CHECK: Please enter a number from 1.0 to 9999997.00.

7. Other - Please specify: (G94APERSPEC)

SIGNAL: Please select a unit of time.

G94AA. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

During which months of [PYEAR] did [he / she] get this income?

- ENTER all that apply

- PROBE: Any others?

Select All Clear All


WEB During which months of [PYEAR] did [he / she] get this income?

Please select all that apply.

Select All Clear All


G95. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

What was [his / her] occupation? What kind of work did [he / she] do?

- DO NOT PROBE

String 500

WEB What was [his / her] occupation? What kind of work did [he / she] do?

String 500

G96. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

About how many weeks did [he / she] work on that job last year ([PYEAR])?

1 – 52

WEB About how many weeks did [he / she] work on that job last year ([PYEAR])?

1 – 52  Number of weeks

CHECK: Please enter a number from 1 to 52.
G97. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[(Respondent)]
During the weeks that [he / she] worked in [PYEAR], about how many hours did [he / she] usually work per week?
• ROUND DOWN for fractions less than ½ (0.5)
• ROUND UP for fractions ½ (0.5) or more
1 – 168

(WEB) During the weeks that [he / she] worked in [PYEAR], about how many hours did [he / she] usually work per week?
1 – 168 Number of hours per week
CHECK: Please enter a number from 1 to 168.

G92=2. Interest

G94B, G94BPERSPEC. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[(Respondent)]
How much was from interest (in [PYEAR])?
• ENTER amount here, then SELECT unit of time on next screen (Month, Year)
$ 1 – 999,997.00 per

The amount entered is: [G94B] per ____
• SELECT the unit of time below
5. Month 6. Year 7. Other-specify (G94BPERSPEC. Specify. (String 100))

(WEB) How much was from interest in [PYEAR]?
$ 1 – 999,997.00 per 5. Month 6. Year
CHECK: Please enter a number from 1 to 999997.
7. Other - Please specify: (G94BPERSPEC)
SIGNAL: Please select a unit of time.

G94BB. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[(Respondent)]
During which months of [PYEAR] did [he / she] get this income?
• ENTER all that apply
• PROBE: Any others?
Select All Clear All

(WEB) During which months of [PYEAR] did [he / she] get this income? Please select all that apply.
Select All Clear All
G92=3. SSI

G94C, G94CPER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

How much was from SSI (in [PYEAR])?
- 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 – 999,997.00 → GO TO G94CC

The amount entered is: [G94C] per __
- SELECT the unit of time below

5. Month 6. Year 7. Other-specify (G94CPERSPEC. Specify. (String 100))

(WEB) How much was from Supplemental Security Income (SSI) in [PYEAR]?

$ 1 – 999,997.00 per 5. Month 6. Year

CHECK: Please enter a number from 1 to 999997.

SIGNAL: Please select a unit of time.

G94CC. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

During which months of [PYEAR] did [he / she] get this income?
- ENTER all that apply
- PROBE: Any others?

Select All  Clear All

(WEB) During which months of [PYEAR] did [he / she] get this income?

Please select all that apply.

Select All  Clear All

G92=4. Welfare

G94D, G94DPER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

How much was from welfare (in [PYEAR])?
- ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)

$ 1 – 999,997.00 → GO TO G94DD

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))

(WEB) How much was from welfare in [PYEAR]?

$ 1 – 999,997.00 per 3. Week 4. Two weeks 5. Month 6. Year

CHECK: Please enter a number from 1 to 999997.

SIGNAL: Please select a unit of time.
G94DD. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

During which months of [PYEAR] did [he / she] get this income?

- ENTER all that apply
- PROBE: Any others?

Select All  Clear All

(WEB) During which months of [PYEAR] did [he / she] get this income?
Please select all that apply.

Select All  Clear All

G92=5. Social Security

G94ECKPT. CAI Checkpoint: Whether Social Security Already Reported For This OFUM at G32

1. Not Reported  5. Already Reported  → GO TO Next G94 Item; Then GO TO G98 RULE

G94E2A. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

What was the Social Security in [PYEAR]? 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))

(WEB) What was the Social Security in [PYEAR]?
Please select all that apply.

3. Survivors benefits  5. Dependent of disabled recipient
6. Dependent of retired recipient  7. Other - Please specify: (G94E2ASPEC)

G94E3, G94E3PER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

How much was the total amount from Social Security? [G94E2A=2+ SELECTIONS: Please include all amounts from all types of Social Security [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 G94E4

The amount entered is: [G94E3] per ____

- SELECT the unit of time below

5. Month  6. Year  7. Other - specify (G94E3PERSPEC. Specify. (String 100))

(WEB) How much was the total amount from Social Security? [G94E2A=2+ SELECTIONS: Please include all amounts from all types of Social Security [he / she] received in [PYEAR].]

$ 1 – 999,997  .00 per  5. Month  6. Year

CHECK: Please enter a number from 1 to 999997.

SIGNAL: Please select a unit of time.
G94E4. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[(Respondent)]
During which months of [PYEAR] did [he / she] get this income? [[This includes all types of Social
Security [he / she] received in [PYEAR].]]
  • ENTER all that apply
  • PROBE: Any others?

Select All Clear All

WEB During which months of [PYEAR] did [he / she] get this income? [This includes all types of Social
Security [he / she] received in [PYEAR].]
Please select all that apply.
Select All Clear All

G92=6. Other income

G94F. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[(Respondent)]
What was that other income from (in [PYEAR])?
  • 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? (DO NOT PROBE)
    • 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

WEB What was that other income from in [PYEAR]?
If this income comes from a job, please tell us: the type of work done, start (and end) dates, job title,
round-trip commute time, the number of weeks worked in [PYEAR], and the average number of hours per
week worked in [PYEAR].

Open End

G94F2, G94F2PER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[(Respondent)]
How much was it (in [PYEAR])?
  • ENTER amount here, then SELECT unit of time on next screen (Week, Two weeks, Month, Year)

$ 1 – 999,997 DK/RF → GO TO G94F3

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))

WEB How much was it in [PYEAR]?

$ 1 – 999,997 .00 per

CHECK: Please enter a number from 1 to 999997.

SIGNAL: Please select a unit of time.
G94F3. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] {{Respondent}}

During which months of [PYEAR] did [he / she] get this income?

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

<table>
<thead>
<tr>
<th>Select All</th>
<th>Clear All</th>
</tr>
</thead>
</table>

(WEB) During which months of [PYEAR] did [he / she] get this income?

*Please select all that apply.*

<table>
<thead>
<tr>
<th>Select All</th>
<th>Clear All</th>
</tr>
</thead>
</table>

G98 RULE: Whether There are More Little OFUMs

More Little OFUMs → REPEAT G92 - G94F3; Max=24; No More Little OFUMs

Then GO TO G99

End G90D_G97

PYear Settlements, Deductions & Support of Others

G99. (CATI) Did [you / [REFERENCE PERSON]] [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

GO TO G100

(WEB) Did [you / [REFERENCE PERSON]] [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

GO TO G100

G100. (CATI) How much did that amount to (in [PYEAR])?

$ 1 – 9,999,997

(WEB) How much did that amount to in [PYEAR]?

$ 1 – 9,999,997 .00

CHECK: Please enter a number from 1 to 9999997.

G101. (CATI) How much of that was an inheritance (in [PYEAR])?

$ 0 – [[G100] / 9,999,997]

(WEB) How much of that was an inheritance in [PYEAR]?

$ 0 – [[G100] / 9,999,997] .00

CHECK: Please enter an amount less than or equal to [G100].
G102. (CATI) Some people have expenses they can itemize and deduct on their income tax. Did \([R=RP, SP: \text{you} / \ R=OFUM, PROXY: [\text{REFERENCE PERSON}] [SP in FU: and [SPOUSE-PARTNER]]]\) itemize deductions on \([R=RP, SP: \text{your} / R=OFUM, PROXY: [\text{his} / \text{her} / SP in FU: \text{their}]] [\text{PYEAR}]\) federal income tax, such as property taxes, interest payments, medical expenses, and charitable contributions?

<table>
<thead>
<tr>
<th>1. Yes</th>
<th>5. No</th>
<th>7. (Did/Will) not file a [PYEAR] tax return</th>
</tr>
</thead>
</table>

GO TO G102A

(GWEB) Some people have expenses they can itemize and deduct on their income tax. Did \([R=RP, SP: \text{you} / R=OFUM, PROXY: [\text{REFERENCE PERSON}] [SPOUSE-PARTNER in FU: and [SPOUSE-PARTNER]]]\) itemize deductions on \([R=RP, SP: \text{your} / R=OFUM, PROXY: [\text{his} / \text{her} / SP in FU: \text{their}]] [\text{PYEAR}]\) federal income tax, such as property taxes, interest payments, medical expenses, and charitable contributions?

<table>
<thead>
<tr>
<th>1. Yes</th>
<th>5. No</th>
<th>7. Did not file a [PYEAR] tax return</th>
</tr>
</thead>
</table>

GO TO G102A

G102A. (CATI) How much was \([\text{your} / \text{his} / \text{her} / \text{their}]\) itemized deduction for charitable contributions (in [PYEAR])?

\[\$ 0 – 999,997\]

(GWEB) How much was \([\text{your} / \text{his} / \text{her} / \text{their}]\) itemized deduction for charitable contributions in [PYEAR]?

\[
\$ \ 0 – 999,997 \ \ .00
\]

CHECK: Please enter a number from 0 to 999997.

G102B. (CATI) How much was \([\text{your} / \text{his} / \text{her} / \text{their}]\) itemized deduction for medical expenses (in [PYEAR])?

- IF necessary: Is that the amount of the deduction or is that the total medical expenses? What was the amount of the deduction?

\[\$ 0 – 999,997\]

(GWEB) How much was \([\text{your} / \text{his} / \text{her} / \text{their}]\) itemized deduction for medical expenses in [PYEAR]?

\[
\$ \ 0 – 999,997 \ \ .00
\]

CHECK: Please enter a number from 0 to 999997.

G103. (CATI) In [PYEAR], did \([\text{you} / [\text{REFERENCE PERSON}]] [\text{or anyone else in} [\text{your} / \text{his} / \text{her}] \text{family living there}]\) 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.

<table>
<thead>
<tr>
<th>1. Yes</th>
<th>5. No</th>
<th>\rightarrow GO TO SECTION W</th>
</tr>
</thead>
</table>

GO TO G104

(GWEB) In [PYEAR], did \([\text{you} / [\text{REFERENCE PERSON}]] [\text{or anyone else in} [\text{your} / \text{his} / \text{her}] \text{family living there}]\) 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.

<table>
<thead>
<tr>
<th>1. Yes</th>
<th>5. No</th>
<th>\rightarrow GO TO SECTION W</th>
</tr>
</thead>
</table>

GO TO G104
G104. (CATI) How many people was that?

1 – 9  DK/RF  → GO TO G106

GO TO FIRSTNAME

(WEB) How many people was that?

1 – 9  Number of people  NA  → GO TO G106

GO TO FIRSTNAME

SECTION_G.G105.G105PEOPLE[1..24] [1..24]=Which person

FIRSTNAME, LASTNAME, G105RTHLAB. (CATI) What is the [first / next] person’s first and last name?

- ENTER First name

String 10

(What is the [first / next] person’s first and last name?)

- ENTER Last name

String 15

What is [FIRSTNAME] [LASTNAME]’s relationship to [you / [REFERENCE PERSON]]?

- ENTER person’s relationship to Reference Person

<table>
<thead>
<tr>
<th>Relationship</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Husband</td>
<td>101.</td>
</tr>
<tr>
<td>Ex-Male Spouse (Ex-Husband)</td>
<td>151.</td>
</tr>
<tr>
<td>Deceased Male Spouse</td>
<td>181.</td>
</tr>
<tr>
<td>Male Spouse</td>
<td>201.</td>
</tr>
<tr>
<td>Son</td>
<td>301.</td>
</tr>
<tr>
<td>Son of Partner</td>
<td>351.</td>
</tr>
<tr>
<td>Foster son</td>
<td>381.</td>
</tr>
<tr>
<td>Brother-in-law</td>
<td>471.</td>
</tr>
<tr>
<td>Sister-in-law</td>
<td>472.</td>
</tr>
<tr>
<td>Sister of Partner/Boyfriend/Girlfriend</td>
<td>482.</td>
</tr>
<tr>
<td>Brother of Partner/Boyfriend/Girlfriend</td>
<td>481.</td>
</tr>
<tr>
<td>Father</td>
<td>501.</td>
</tr>
<tr>
<td>Mother</td>
<td>502.</td>
</tr>
<tr>
<td>Grandfather</td>
<td>661.</td>
</tr>
<tr>
<td>Grandmother</td>
<td>662.</td>
</tr>
<tr>
<td>Father of Spouse</td>
<td>671.</td>
</tr>
<tr>
<td>Niece of Reference Person</td>
<td>702.</td>
</tr>
<tr>
<td>Niece of Spouse</td>
<td>712.</td>
</tr>
<tr>
<td>Aunt of Reference Person</td>
<td>722.</td>
</tr>
<tr>
<td>Aunt of Spouse</td>
<td>732.</td>
</tr>
<tr>
<td>Cousin of Reference Person-Female</td>
<td>742.</td>
</tr>
<tr>
<td>Cousin of Spouse -Female</td>
<td>752.</td>
</tr>
<tr>
<td>Daughter of Boyfriend/Girlfriend</td>
<td>832.</td>
</tr>
<tr>
<td>Uncooperative Male Spouse</td>
<td>901.</td>
</tr>
<tr>
<td>Uncooperative Male Partner</td>
<td>921.</td>
</tr>
<tr>
<td>Relative of Reference Person-Male</td>
<td>951.</td>
</tr>
<tr>
<td>Relative of Spouse-Male</td>
<td>961.</td>
</tr>
<tr>
<td>Relationship to [you / [REFERENCE PERSON]]</td>
<td>String 10</td>
</tr>
<tr>
<td>------------------------------------------</td>
<td>----------</td>
</tr>
<tr>
<td>First name</td>
<td></td>
</tr>
<tr>
<td>Last name</td>
<td></td>
</tr>
</tbody>
</table>

**Relative of Partner/Boyfriend/Girlfriend-Male**
- 971. Relative of Partner/Boyfriend/Girlfriend-Male
- 972. Relative of Partner/Boyfriend/Girlfriend-Female

**Friend/Non-Relative-Male**
- 981. Friend/Non-Relative-Male

**Friend/Non-Relative-Female**
- 982. Friend/Non-Relative-Female

*WEB* What is [G104=1: this / G104=2-9: [LOOP 1: the first / LOOP 2-9: the next]] person’s name and relationship to [you / [REFERENCE PERSON]]?

151. Ex-Male Spouse (Ex-Husband) 681. Great-Grandfather
152. Ex-Female Spouse (Ex-Wife) 682. Great-Grandmother
181. Deceased Male Spouse 691. Great-Grandfather of Spouse
182. Deceased Female Spouse 692. Great-Grandmother of Spouse
201. Male Spouse 701. Nephew of [REFERENCE PERSON]
202. Female Spouse 702. Niece of [REFERENCE PERSON]
221. Male Partner 711. Nephew of Spouse
222. Female Partner 712. Niece of Spouse
301. Son 721. Uncle of [REFERENCE PERSON]
302. Daughter 722. Aunt of [REFERENCE PERSON]
331. Stepson 731. Uncle of Spouse
332. Stepdaughter 732. Aunt of Spouse
351. Son of Partner 741. Male Cousin of [REFERENCE PERSON]
352. Daughter of Partner 742. Female Cousin of [REFERENCE PERSON]
371. Son-in-law 751. Male Cousin of Spouse
372. Daughter-in-law 752. Female Cousin of Spouse
381. Foster son 831. Son of Boyfriend/Girlfriend
382. Foster daughter 832. Daughter of Boyfriend/Girlfriend
401. Brother 881. Boyfriend
402. Sister 882. Girlfriend
472. Sister-in-law 952. Female Relative of [REFERENCE PERSON]
481. Brother of Partner/Boyfriend/Girlfriend 961. Male Relative of Spouse
482. Sister of Partner/Boyfriend/Girlfriend 962. Female Relative of Spouse
501. Father 971. Male Relative of Partner/Boyfriend/Girlfriend
502. Mother 972. Female Relative of Partner/Boyfriend/Girlfriend
571. Father-in-law 981. Male Friend/Non-Relative
572. Mother-in-law 982. Female Friend/Non-Relative
581. Father of Partner/Boyfriend/Girlfriend 991. Male Friend/Non-Relative
582. Mother of Partner/Boyfriend/Girlfriend 992. Female Friend/Non-Relative
601. Grandson 1001. Male Friend/Non-Relative
602. Granddaughter 1002. Female Friend/Non-Relative
661. Grandfather 1003. Male Friend/Non-Relative
662. Grandmother 1004. Female Friend/Non-Relative
671. Grandfather of Spouse 1005. Male Friend/Non-Relative
672. Grandmother of Spouse 1006. Female Friend/Non-Relative
G106 rule: Whether more people reported at G104

| More People | REPEAT FIRSTNAME - G105RTLAB; Max=9; Then GO TO G106 | No More People |

End G105PEOPLE

G106. (CATI) How much money was that altogether in [PYEAR]?

\( \$ 1 - 9,999,997 \)

(WEB) How much money was that altogether in [PYEAR]?

\( \$ 1 - 9,999,997 \ .00 \)

CHECK: Please enter a number from 1 to 9999997.

G107. (CATI) Was any of that child support (in [PYEAR])?

1. Yes 5. No \( \rightarrow \) GO TO G109

GO TO G108

(WEB) Was any of that child support in [PYEAR]?

1. Yes 5. No \( \rightarrow \) GO TO G109

GO TO G108

G108. (CATI) How much did that child support amount to in [PYEAR]?

\( \$ 1 - \frac{[G106]}{9,999,997} \)

(WEB) How much did that child support amount to in [PYEAR]?

\( \$ 1 - \frac{[G106]}{9,999,997} \ .00 \)

CHECK: Please enter an amount less than or equal to [G106].

G109. (CATI) Was any of the money [you / [REFERENCE PERSON]] gave in [PYEAR] alimony?

1. Yes 5. No \( \rightarrow \) GO TO G111 RULE

GO TO G110

(WEB) Was any of the money [you / [REFERENCE PERSON]] gave in [PYEAR] alimony?

1. Yes 5. No \( \rightarrow \) GO TO G111 RULE

GO TO G110

G110. (CATI) How much did that alimony amount to in [PYEAR]?

\( \$ 1 - \frac{[G106]}{9,999,997} \)

(WEB) How much did that alimony amount to in [PYEAR]?

\( \$ 1 - \frac{[G106]}{9,999,997} \ .00 \)

CHECK: Please enter an amount less than or equal to [G106].

G111 rule: Number of People Reported at G104

| More Than One | Only One | \( \rightarrow \) GO TO G114 |
G112. *(CATI)* Were any of those people dependent on [you / [REFERENCE PERSON]] for more than half of their total support (in [PYEAR])?

1. Yes 5. No → GO TO SECTION W

GO TO G113

*(WEB)* Were any of those people dependent on [you / [REFERENCE PERSON]] for more than half of their total support in [PYEAR]?

1. Yes 5. No → GO TO SECTION W

GO TO G113

G113. *(CATI)* How many people was that?

1 – \[
\frac{G104}{9}
\]

GO TO SECTION W

*(WEB)* How many people was that?

1 – \[
\frac{G104}{9}
\]

Number of people

GO TO SECTION W

CHECK: Please enter a number less than or equal to [G104].

G114. *(CATI)* Was that person dependent on [you / [REFERENCE PERSON]] for more than half of their total support (in [PYEAR])?

1. Yes 5. No

GO TO SECTION W

*(WEB)* Was that person dependent on [you / [REFERENCE PERSON]] for more than half of their total support in [PYEAR]?

1. Yes 5. No

GO TO SECTION W

End SECTION_G
Section W: Wealth; Active Savings

TOC

SECTION_W

Other Real Estate

W1. (CATI) The next questions I will be asking are designed to give estimates of the wealth of families. [R=RP, SP, OFUM: In these questions when I refer to the family, I mean your family living there with you.]

Do you [or your family living there] have any real estate [A19=OWNS: other than your main home,] such as a second home, land (not including farmland), rental real estate, or money owed to you on a land contract?

1. Yes 5. No → GO TO W6

W1A. (CATI) Does that include a second home?

1. Yes 5. No

(WEB) The next questions are designed to give estimates of the wealth of families in the United States. [R=RP, SP, OFUM: In these questions, “family” means your family living there with you.]

Do you [or your family living there] have any real estate [A19=OWNS: other than your main home,] such as a second home, land not including farmland, rental real estate, or money owed to you on a land contract?

1. Yes 5. No → GO TO W6

W1A. (CATI) Does that include a second home?

1. Yes 5. No

(WEB) Does that include a second home?

1. Yes 5. No

W2A. (CATI) How much is the real estate worth, that is, how much would it sell for?

• If needed: Real estate [A19=OWNS: other than your main home,] such as a second home, land (not including farmland), rental real estate, or money owed to you on a land contract

$ 0 – 999,999,997 → GO TO W2B  DK/RF → GO TO W3A

(WEB) How much is the real estate worth, that is, how much would it sell for?

$ 0 – 999,999,997 → GO TO W2B  NA → GO TO W3AW5A_W

CHECK: Please enter a number from 0 to 999999997.

W3A. (CATI ONLY) Would it amount to $50,000 or more?

1. Yes 5. No  DK/RF → GO TO W2B

↓

W4A. (CATI ONLY) $175,000 or more?

W5A. (CATI ONLY) $20,000 or more?

1. Yes 5. No  DK/RF → GO TO W2B

GO TO W2B

GO TO W2B

W3AW5A_W. (WEB ONLY) What is your best estimate?

1. Less than $20,000 2. $20,000 to less than $50,000

3. $50,000 to less than $175,000 4. $175,000 or more
W2B. **(CATI)** (And) how much debt do you owe on that (real estate)?

- If needed: Real estate \[A19=OWNS\]: other than your main home, such as a second home, land (not including farmland), rental real estate, or money owed to you on a land contract

\[
\text{\$0} - 999,999,997 \quad \rightarrow \quad \text{GO TO W6} \quad \text{DK/RF } \rightarrow \quad \text{GO TO W3B}
\]

*(WEB)* How much debt do you owe on that real estate?

\[
\text{\$0} - 999,999,997 \quad .00 \quad \rightarrow \quad \text{GO TO W6} \quad \text{NA } \rightarrow \quad \text{GO TO W3BW5B_W}
\]

CHECK: Please enter a number from 0 to 999999997.

---

W3B. **(CATI ONLY)** Would it amount to $50,000 or more?

1. Yes 5. No  

↓

W4B. **(CATI ONLY)** $175,000 or more?

1. Yes 5. No  

↓

W5B. **(CATI ONLY)** $20,000 or more?

1. Yes 5. No  

DK/RF → GO TO W6

---

W3BW5B_W. **(WEB ONLY)** What is your best estimate?

1. Less than $20,000 2. $20,000 to less than $50,000  

3. $50,000 to less than $175,000 4. $175,000 or more

---

**Personal Vehicles**

W6. **(CATI)** What about the value of what you [or anyone in your family living there] own on wheels? Including \[F47=YES\]: personal vehicles you may have already told me about and] any cars, trucks, a motor home, a trailer, or a boat - what are they worth all together, minus anything you still owe on them?

- Include only vehicles owned by the FU
- DO NOT include vehicles owned by HU or HUCS people

\[
\text{\$-99,999,999} - 999,999,997 \quad \rightarrow \quad \text{GO TO W10} \quad \text{DK/RF } \rightarrow \quad \text{GO TO W7}
\]

*(WEB)* What about the value of vehicles, including \[F47=YES\]: personal vehicles you may have already reported and] any cars, trucks, motor homes, trailers, or boats - what are they worth all together, minus anything you [or anyone in your family living there] still owe on them?

For amounts less than $0.00, enter the minus symbol (-) and then the amount. For example: Enter “-500” to indicate a loss of $500.00.

\[
\text{\$-99,999,999} - 999,999,997 \quad .00 \quad \rightarrow \quad \text{GO TO W10} \quad \text{NA } \rightarrow \quad \text{GO TO W7W9_W}
\]

CHECK: Please enter a number from -99999999 to 999999997.

---

W7. **(CATI ONLY)** Would they amount to $10,000 or more?

1. Yes 5. No  

↓

W8. **(CATI ONLY)** $25,000 or more?

1. Yes 5. No  

↓

W9. **(CATI ONLY)** $2,000 or more?

1. Yes 5. No  

DK/RF → GO TO W10

---

W7W9_W. **(WEB ONLY)** What is your best estimate?

1. Less than $2,000 2. $2,000 to less than $10,000  

3. $10,000 to less than $25,000 4. $25,000 or more
Farm or Business

W10. **(CATI)** Do you [or anyone in your family living there] currently own part or all of a farm or business?

1. Yes 5. No → GO TO W15

GO TO W11A

**WEB** Do you [or anyone in your family living there] currently own part or all of a farm or business?

1. Yes 5. No → GO TO W15

GO TO W11A

W11A. **(CATI)** How much is your part (of the farm or business) worth, that is, how much would it sell for?

$ 0 – 999,999,997 → GO TO W11B  DK/RF → GO TO W12A

**WEB** How much is your part of the farm or business worth, that is, how much would it sell for?

$ 0 – 999,999,997 .00 → GO TO W11B  NA → GO TO W12AW14A_W

CHECK: Please enter a number from 0 to 999999997.

W12A. **(CATI ONLY)** Would it amount to $50,000 or more?

1. Yes 5. No  DK/RF → GO TO W11B

W13A. **(CATI ONLY)** $200,000 or more?

W14A. **(CATI ONLY)** $10,000 or more?

1. Yes 5. No  DK/RF  1. Yes 5. No  DK/RF

GO TO W11B  GO TO W11B

W12AW14A_W. **(WEB ONLY)** What is your best estimate?

1. Less than $10,000  2. $10,000 to less than $50,000  3. $50,000 to less than $200,000  4. $200,000 or more

W11B. **(CATI)** And how much debt do you owe on that (farm or business)?

$ 0 – 999,999,997 → GO TO W15  DK/RF → GO TO W12B

**WEB** How much debt do you owe on that farm or business?

$ 0 – 999,999,997 .00 → GO TO W15  NA → GO TO W12BW14B_W

CHECK: Please enter a number from 0 to 999999997.

W12B. **(CATI ONLY)** Would it amount to $50,000 or more?

1. Yes 5. No  DK/RF → GO TO W15

W13B. **(CATI ONLY)** $200,000 or more?

W14B. **(CATI ONLY)** $10,000 or more?

1. Yes 5. No  DK/RF  1. Yes 5. No  DK/RF

GO TO W15  GO TO W15

W12BW14B_W. **(WEB ONLY)** What is your best estimate?

1. Less than $10,000  2. $10,000 to less than $50,000  3. $50,000 to less than $200,000  4. $200,000 or more
W15. (CATI) (Do you [or anyone in your family living there] have...) Any shares of stock in publicly held corporations, stock mutual funds, or investment trusts, not including stocks in retirement accounts?

1. Yes 5. No → GO TO W21

GO TO W16

(WEB) Do you [or anyone in your family living there] have any shares of stock in publicly held corporations, stock mutual funds, or investment trusts, not including stocks in employer-based pensions or Individual Retirement Accounts (IRAs)?

1. Yes 5. No → GO TO W21

GO TO W16

W16. (CATI) If you sold all that and paid off anything you owed on it, how much would you have?

\[ -99,999,999 \leq \text{Amount} \leq 999,999,997 \]

→ GO TO W20 CCKPT

(DK/RF) → GO TO W17 CCKPT

(WEB) If you sold all that and paid off anything you owed on it, how much would you have?

For amounts less than $0.00, enter the minus symbol (−) and then the amount. For example: Enter “−500” to indicate a loss of $500.00.

\[ -99,999,999 \leq \text{Amount} \leq 999,999,997.00 \]

→ GO TO W20 CCKPT

NA → GO TO W17 W20 W

CHECK: Please enter a number from -99999999 to 999999997.

W17. (CATI ONLY) Would it amount to $50,000 or more?

1. Yes 5. No → Go TO W20 CCKPT

DK/RF → GO TO W17 W20 W

W19. (CATI ONLY) $15,000 or more?

1. Yes 5. No → Go TO W20 CCKPT

DK/RF

W18. (CATI ONLY) $150,000 or more?

1. Yes 5. No → Go TO W20 CCKPT

DK/RF

W20. (CATI ONLY) $150,000 or more?

1. Yes 5. No → Go TO W20 CCKPT

DK/RF

W17 W20 W. (WEB ONLY) What is your best estimate?

1. Less than $15,000 2. $15,000 to less than $50,000

3. $50,000 to less than $150,000 4. $150,000 or more

W20 CCKPT. CAI Checkpoint: Whether Dividend Account Reported But Dividend Income Was Not (Section G)


5. All Others → Go TO W21

↓
W20E, W20EPER. *(CATI) [RP+SP IN FU]: For both [R=RP, SP: you and [[REFERENCE PERSON] / [SPOUSE-PARTNER]] / R=OFUM, PROXY: [REFERENCE PERSON] and [SPOUSE-PARTNER]], how much in dividends did [R=RP, SP: you / R=OFUM, PROXY: they] receive / RP ONLY IN FU: How much were [R=RP: your / R=OFUM, PROXY: [his/her]] dividends altogether in [PYEAR]?

- Includes reinvested dividends
- 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

The amount entered is: [W20E] per ____

- SELECT the unit of time below

  5. Month  6. Year  7. Other-specify (W20EPERSPEC. Specify. (String 100))


$ 0 → GO TO W21  NA  1 – 999,997 .00 per  5. Month  6. Year

CHECK: Please enter a number from 1 to 999997.

7. Other - Please specify: (W20EPERSPEC)

*SIGNAL: Please select a unit of time

W20F. *(CATI) During which months of [PYEAR] did you get this income?

- ENTER all that apply
- PROBE: Any others?

<table>
<thead>
<tr>
<th>Select All</th>
<th>Clear All</th>
</tr>
</thead>
</table>

*(WEB) During which months of [PYEAR] did you get this income?

*Please select all that apply.

<table>
<thead>
<tr>
<th>Select All</th>
<th>Clear All</th>
</tr>
</thead>
</table>

Annuities & Individual Retirement Account

W21. *(CATI) (Do you [or anyone in your family living there] have...)

Any money in private annuities, or Individual Retirement Accounts (I.R.A.s)?

1. Yes  5. No → GO TO W27A

GO TO W21B

*(WEB) Do you [or anyone in your family living there] have any money in private annuities or Individual Retirement Accounts (IRAs)?

1. Yes  5. No → GO TO W27A

GO TO W21B

W21B. *(CATI) Is that money in private annuities, Individual Retirement Accounts (I.R.A.s), or both?


*(WEB) Is that money in private annuities, Individual Retirement Accounts (IRAs), or both?
1. Private annuities
2. Individual Retirement Accounts (IRAs)
3. Both private annuities and Individual Retirement Accounts (IRAs)

W21A. *(CATI)* 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

*(WEB)* Are they...

1. Mostly in stocks
2. Mostly in interest-earning assets
3. Split between stocks and assets

W22. *(CATI)* How much would they be worth?

$1 – 999,999,997 → GO TO W27A  DK/RF → GO TO W23

*(WEB)* How much would they be worth?

$1 – 999,999,997.00 → GO TO W27A  NA → GO TO W23

CHECK: Please enter a number from 1 to 999999997.

W23. *(CATI ONLY)* Would it amount to $50,000 or more?

1. Yes
5. No  DK/RF → GO TO W27A

W24. *(CATI ONLY)* $100,000 or more?

1. Yes
5. No  DK/RF → GO TO W27

W25. *(CATI ONLY)* $15,000 or more?

1. Yes
5. No  DK/RF → GO TO W27A

W26. *(CATI ONLY)* $250,000 or more?

1. Yes
5. No  DK/RF → GO TO W27A

W23W26_W. *(WEB ONLY)* What is your best estimate?

1. Less than $15,000
2. $15,000 to less than $50,000
3. $50,000 to less than $100,000
4. $100,000 to less than $250,000
5. $250,000 or more

Checking, Savings & Money Market Accounts

W27A. *(CATI)* Do you [or anyone in your family living there] have checking or savings accounts, including money market accounts?

1. Yes, one or more
5. No, none → GO TO W27

GO TO W28A

*(WEB)* Do you [or anyone in your family living there] have checking or savings accounts, including money market accounts?

1. Yes
5. No → GO TO W27

GO TO W28A

W28A. *(CATI)* If you added up all of your checking, saving, and money market accounts [for all of your family living there], about how much would they amount to altogether right now?

$-99,999,999 – 999,999,997 → GO TO W27  DK/RF → GO TO W29A
(WEB) If you added up all such accounts [for all of your family living there], about how much would they amount to altogether right now?

For amounts less than $0.00, enter the minus symbol (-) and then the amount. For example: Enter “-500” to indicate a loss of $500.00.

$ -99,999,999 – 999,999,997.00 → GO TO W27
NA → GO TO W29AW32A_W

CHECK: Please enter a number from -99,999,999 to 999999997.

W29A. (CATI ONLY) Would they amount to $4,000 or more?

1. Yes
   ↓
W30A. (CATI ONLY) $15,000 or more?

   1. Yes
   ↓
   GO TO W27

   5. No
   → GO TO W27

W32A. (CATI ONLY) $1,000 or more?

   1. Yes
   ↓
   GO TO W27

   5. No
   → GO TO W27

W31A. (CATI ONLY) $60,000 or more?

   1. Yes
   → GO TO W27

   5. No
   → GO TO W27

W29AW32A_W. (WEB ONLY) What is your best estimate?

1. Less than $1,000
2. $1,000 to less than $4,000
3. $4,000 to less than $15,000
4. $15,000 to less than $60,000
5. $60,000 or more

Certificate of Deposit, Bonds & Treasury Bills

W27. (CATI) Not including retirement accounts, do you [or anyone in your family living there] have any money in certificates of deposit, government bonds, or treasury bills?

   1. Yes, one or more
   5. No, none
   → GO TO W31CCKPT

GO TO W28

(WEB) Not including employer-based pensions or Individual Retirement Accounts (IRAs), do you [or anyone in your family living there] have any money in certificates of deposit, government bonds, or treasury bills?

   1. Yes
   5. No
   → GO TO W31CCKPT

GO TO W28

W28. (CATI) If you added up all such accounts [for all of your family living there], about how much would they amount to altogether right now?

$ 1 – 999,999,997 → GO TO W31CCKPT
DK/RF → GO TO W29

(WEB) If you added up all such accounts [for all of your family living there], about how much would they amount to altogether right now?

$ 1 – 999,999,997.00 → GO TO W31CCKPT
NA → GO TO W29W32_W

CHECK: Please enter a number from 1 to 999999997.
W29. (CATI ONLY) Would they amount to $5,000 or more?

1. Yes  5. No DK/RF → GO TO W31CCKPT

W30. (CATI ONLY) $10,000 or more?

1. Yes  5. No DK/RF → GO TO W31CCKPT

W31. (CATI ONLY) $50,000 or more?

1. Yes  5. No DK/RF → GO TO W31CCKPT

W29W32_W. (WEB ONLY) What is your best estimate?

1. Less than $1,000  2. $1,000 to less than $5,000
3. $5,000 to less than $10,000  4. $10,000 to less than $50,000
5. $50,000 or more

W31CCKPT. CAI Checkpoint: Whether Interest Account Reported But Interest Income Was Not (Section G)


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

$0 → GO TO W33

The amount entered is: [W31E] per ____

• SELECT the unit of time below

5. Month  6. Year  7. Other-specify (W31EPERSPEC: Specify: (String 100))

(WEB) How much interest did [R=RP & RP ONLY IN FU: you / R=RP, SP & RP+SP IN FU: you and [[REFERENCE PERSON] / [SPOUSE-PARTNER]] / R=OFUM, PROXY & RP+SP IN FU: [REFERENCE PERSON] and [SPOUSE-PARTNER]] receive altogether in [PYEAR]?

$0 → GO TO W33

CHECK: Please enter a number from 0 to 999997.

5. Month  6. Year

7. Other - Please specify: (W31EPERSPEC)
W31F. During which months of [PYEAR] did you get this income?
   • ENTER all that apply
   • PROBE: Any others?

<table>
<thead>
<tr>
<th>Select All</th>
<th>Clear All</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>
</tbody>
</table>

(WEB) During which months of [PYEAR] did you get this income?
Please select all that apply.

Select All | Clear All
-----------|-----------|
1. January  | 2. February|
3. March    | 4. April   |
5. May      | 6. June    |
7. July     | 8. August  |
9. September| 10. October|
11. November| 12. December|

Life Insurance, Collections, Trusts & Estates

W33. (CATI) (Do you [or anyone in your family living there] 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

GO TO W34

(WEB) Do you [or anyone in your family living there] 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 reported?

1. Yes  5. No → GO TO W38A

GO TO W34

W33. (CATI) If you sold that and paid off any debts on it, how much would you have?

$ -99,999,999 – 999,999,997 → GO TO W38A  DK/RF → GO TO W35

(WEB) If you sold that and paid off any debts on it, how much would you have?

For amounts less than $0.00, enter the minus symbol (-) and then the amount. For example: Enter “-500” to indicate a loss of $500.00.

$ -99,999,999 – 999,999,997 .00 → GO TO W38A  NA → GO TO W35

CHECK: Please enter a number from -999999999 to 999999997.

W35. (CATI ONLY) Would it amount to $10,000 or more?

1. Yes  5. No  DK/RF → GO TO W38A

W36. (CATI ONLY) $25,000 or more?  W37. (CATI ONLY) $2,000 or more?

1. Yes  5. No  DK/RF

GO TO W38A  GO TO W38A

W35W37_W. (WEB ONLY) What is your best estimate?

1. Less than $2,000  2. $2,000 to less than $10,000
3. $10,000 to less than $25,000  4. $25,000 or more
Credit Card Debt

W38A. (CATI) Aside from the debts that we have already talked about, [A23=YES & (F65=YES or F67>0): like any mortgage on your main home or vehicle loans / A23<>YES & (F65<>YES or F67=0, DK, RF, NA): like vehicle loans / A23=YES & (F65=0 & (F65<=YES or F67=0, DK, RF, NA)): like any mortgage on your main home.] do you [or anyone in your family living there] currently have any credit card or store card debt? Do not count new debt that will be paid off this month.

1. Yes 5. No → GO TO W38B

GO TO W39A

(WEB) Aside from the debts that you have already reported, [A23=YES & (F65=YES or F67>0): like any mortgage on your main home or vehicle loans, / A23<>YES & (F65<>YES or F67=0, DK, RF, NA): like vehicle loans, / A23=YES & (F65<>YES or F67=0, DK, RF, NA): like any mortgage on your main home.] do you [or anyone in your family living there] currently have any credit card or store card debt? Do not count new debt that will be paid off this month.

1. Yes 5. No → GO TO W38B

GO TO W39A

W39A. (CATI) If you added up all credit card and store card debts [for all of your family living there], 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 → GO TO W40A

(WEB) If you added up all credit card and store card debts [for all of your family living there], about how much would they amount to right now? Please do not count any new debt that will be paid off this month.

$ 1 – 9,999,997.00 → GO TO W38B

NA → GO TO W40W43A_W

CHECK: Please enter a number from 1 to 999999997.

W40A. (CATI ONLY) Would they amount to $5,000 or more?

1. Yes 5. No DK/RF → GO TO W38B

W41A. (CATI ONLY) (Would they amount to)

$10,000 or more?

1. Yes 5. No DK/RF → GO TO W38B

W42A. (CATI ONLY) (Would they amount to)

$1,000 or more?

1. Yes 5. No DK/RF → GO TO W38B

W43A. (CATI ONLY) (Would they amount to)

$15,000 or more?

1. Yes 5. No DK/RF → GO TO W38B

W40W43A_W. (WEB ONLY) What is your best estimate?

1. Less than $1,000

2. $1,000 to less than $5,000

3. $5,000 to less than $10,000

4. $10,000 to less than $15,000

5. $15,000 or more
**Student Loans, Medical/Legal Bills & Loans from Relatives**

W38B. *(CATI)* Do you [or anyone in your family living there] 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
7. Other-specify

**WEB** Do you [or anyone in your family living there] currently have any other debts such as student loans, medical or legal bills, or loans from relatives?
*Please select all that apply.*

1. Student loans
2. Medical bills
3. Legal bills
4. Loans from relatives
7. Other

W38B=1. Student loans

W39B1. *(CATI)* If you added up all student loans [for all of your 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 W39(B2/B3/B4/B7A) or W43

**WEB** If you added up all student loans [for all of your family living there], about how much would they amount to right now? Please do not count any new debt that will be paid off this month.

$ 1 – 9,999,997.00 → GO TO W39(B2/B3/B4/B7A) or W43

**WEB ONLY** What is your best estimate?

1. Less than $10,000
2. $10,000 to less than $25,000
3. $25,000 to less than $50,000
4. $50,000 to less than $75,000
5. $75,000 or more
W38B= 2. Medical bills

W39B2. (CATI) [W38B=STUDENT LOANS]: How about medical bills (how much would they amount to right now) / ALL OTHERS: If you added up all medical bills [for all of your 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 W39(B3/B4/B7A) or W43

DK/RF → GO TO W40B2

(WEB) If you added up all medical bills for all of your family living there, about how much would they amount to right now? Please include unpaid balances or outstanding medical bills.

$1 - 9,999,997 → GO TO W39(B3/B4/B7A) or W43

NA → GO TO W40W43B2_W

CHECK: Please enter a number from 1 to 9999997.

W40W43B2_W. (WEB ONLY) What is your best estimate?

1. Less than $1,000
2. $1,000 to less than $3,000
3. $3,000 to less than $10,000
4. $10,000 to less than $25,000
5. $25,000 or more

W38B=3. Legal bills

W39B3. (CATI) [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 [for all of your 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 W39(B4/B7A) or W43

DK/RF → GO TO W40B3

(WEB) If you added up all legal bills [for all of your family living there], about how much would they amount to right now? Please include unpaid balances or outstanding legal bills.

$1 - 9,999,997 → GO TO W39(B4/B7A) or W43

NA → GO TO W40W43B3_W

CHECK: Please enter a number from 1 to 9999997.
W40B3. *(CATI ONLY)* Would they amount to $3,000 or more?

1. Yes

W41B3. *(CATI ONLY)* Would they amount to $8,000 or more?

1. Yes

W42B3. *(CATI ONLY)* Would they amount to $1,000 or more?

1. Yes

W43B3. *(CATI ONLY)* Would they amount to $20,000 or more?

1. Yes

W40W43B3_W. *(WEB ONLY)* What is your best estimate?

1. Less than $1,000
2. $1,000 to less than $3,000
3. $3,000 to less than $8,000
4. $8,000 to less than $20,000
5. $20,000 or more

W38B= 4. Loans from relatives

W39B4. *(CATI)* *(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 [for all of your 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 W39B7A or W43  

DK/RF → GO TO W40B4

*(WEB)* If you added up all loans from relatives [for all of your family living there], about how much would they amount to right now? Please include unpaid balances or outstanding loans from relatives.

$ 1 – 9,999,997.00 → GO TO W39B7A or W43  
NA → GO TO W40W43B4_W

CHECK: Please enter a number from 1 to 9999997.

W40B4. *(CATI ONLY)* Would they amount to $4,000 or more?

1. Yes

W41B4. *(CATI ONLY)* Would they amount to $10,000 or more?

1. Yes

W42B4. *(CATI ONLY)* Would they amount to $1,000 or more?

1. Yes

W43B4. *(CATI ONLY)* Would they amount to $20,000 or more?

1. Yes
What is your best estimate?

1. Less than $1,000
2. $1,000 to less than $4,000
3. $4,000 to less than $10,000
4. $10,000 to less than $20,000
5. $20,000 or more

Other

What were those other debts?

Specify

What were those other debts?

If you added up all other debts [for all of your 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 W43
DK/RF → GO TO W40B7

If you added up all other debts [for all of your family living there], about how much would they amount to right now? Please include unpaid balances or outstanding other debts.

$1 - 9,999,997.00 → GO TO W43
NA → GO TO W40W43B7_W

CHECK: Please enter a number from 1 to 9999997.

Would they amount to $4,000 or more?

1. Yes
5. No

Would they amount to $10,000 or more?

1. Yes
5. No

Would they amount to $20,000 or more?

1. Yes
5. No

Would they amount to $4,000 or more?

1. Yes
5. No

Would they amount to $10,000 or more?

1. Yes
5. No

Would they amount to $20,000 or more?

1. Yes
5. No
Money into or Cash from Annuity or IRA

W43. (CATI) These next questions are about changes in your wealth during the last two years. \([R=RP, \ SP, \ OFUM]\): 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 you [or anyone in your family living there] put aside money in any private annuities or I.R.A.s (Individual Retirement Account)?

| 1. Yes | 5. No | → GO TO W48 |

GO TO W44

(WEB) These next questions are about changes in your wealth during the last two years. \([R=RP, \ SP, \ OFUM]\): In these questions, “family” means your family living there with you.
Since January [P2YEAR], did you [or anyone in your family living there] put aside money in any private annuities or Individual Retirement Accounts (IRAs)?

| 1. Yes | 5. No | → GO TO W48 |

GO TO W44

W44. (CATI) How much did that amount to?

\[\$ 1 – 999,999,997 \rightarrow \text{GO TO W48} \quad \text{DK/RF} \rightarrow \text{GO TO W45}\]

(WEB) How much did that amount to?

\[\$ 1 – 999,999,997.00 \rightarrow \text{GO TO W48} \quad \text{NA} \rightarrow \text{GO TO W45W47}_W\]

CHECK: Please enter a number from 1 to 999999997.

W45. (CATI ONLY) Was it $10,000 or more?

| 1. Yes | 5. No | → GO TO W48 |

↓

W46. (CATI ONLY) $50,000 or more?  
W47. (CATI ONLY) $5,000 or more?

| 1. Yes | 5. No | DK/RF | → GO TO W48 |

\[\text{GO TO W48} \quad \text{GO TO W48}\]

W45W47_W. (WEB ONLY) What is your best estimate?

| 1. Less than $5,000 | 2. $5,000 to less than $10,000 |
| 3. $10,000 to less than $50,000 | 4. $50,000 or more |

Cash from Pension, Annuity &

W48. (CATI) (Since January [P2YEAR], did you [or anyone in your family living there]...)
Cash in any part of a pension, private annuity or I.R.A. (Individual Retirement Account)?

| 1. Yes | 5. No | → GO TO W54 |

GO TO W49

(WEB) Since January [P2YEAR], did you [or anyone in your family living there] cash in any part of a pension, private annuity, or Individual Retirement Account (IRA)?

| 1. Yes | 5. No | → GO TO W54 |

GO TO W49
**W49. (CATI)** How much did that amount to?  

$1 – 999,999,997 → GO TO W54  
DK/RF → GO TO W50

**WEB** How much did that amount to?  

$1 – 999,999,997.00 → GO TO W54  
NA → GO TO W50W53_W

CHECK: Please enter a number from 1 to 999999997.

---

**W50. (CATI ONLY)** Was it $10,000 or more?  

1. Yes  
5. No → GO TO W54

---

**W51. (CATI ONLY)** $50,000 or more?  

1. Yes  
5. No → GO TO W54

---

**W52. (CATI ONLY)** $100,000 or more?  

1. Yes  
5. No → GO TO W54

---

**W50W53_W. (WEB ONLY)** What is your best estimate?  

1. Less than $5,000  
2. $5,000 to less than $10,000  
3. $10,000 to less than $50,000  
4. $50,000 to less than $100,000  
5. $100,000 or more

---

**Buy or Sell Main Residence**

**W54. (CATI)** (Since January [P2YEAR], did you [or anyone in your family living there]...  

Sell any home you were using as your main residence?  

1. Yes  
5. No → GO TO W59A  
GO TO W55

**WEB** Since January [P2YEAR], did you [or anyone in your family living there] sell any home you were using as your main dwelling?  

1. Yes  
5. No → GO TO W59A  
GO TO W55

**W55. (CATI)** 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 – 999,999,997 → GO TO W59A  
DK/RF → GO TO W56

**WEB** About how much was the selling price, not including selling commissions and costs?  

$1 – 999,999,997.00 → GO TO W59A  
NA → GO TO W56W58_W

CHECK: Please enter a number from 1 to 999999997.
W56. (CATI ONLY) Was it $60,000 or more?

1. Yes
5. No

DK/RF → GO TO W59A

W57. (CATI ONLY) $120,000 or more?

1. Yes
5. No

DK/RF

→ GO TO W59A

W58. (CATI ONLY) $30,000 or more?

1. Yes
5. No

DK/RF

→ GO TO W59A

W56W58_W. (WEB ONLY) What is your best estimate?

1. Less than $30,000
2. $30,000 to less than $60,000
3. $60,000 to less than $120,000
4. $120,000 or more

Buy or Sell Other Real Estate

W59A. (CATI) (Since January [P2YEAR], did you [or anyone in your family living there]...)

Buy or sell any real estate other than your main home, such as a vacation home, land (not including farmland), or rental property?

- If R says only "Yes", PROBE: Did you buy only, sell only, or both?
- If needed: Real estate [A19=OWNS: other than [your 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

DK/RF

GO TO W60
GO TO W65CKPT
GO TO W60
GO TO W65CKPT

(WEB) Since January [P2YEAR], did you [or anyone in your family living there] buy or sell any real estate other than your 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

NA

GO TO W60
GO TO W65CKPT
GO TO W60
GO TO W65CKPT

W60. (CATI) Altogether, (since January [P2YEAR]), how much money did you [or anyone in your family living there] spend on real estate, not including any mortgages on any of the properties?

- If needed: Real estate [A19=OWNS: other than [your main home,] such as a vacation home, land (not including farmland), or rental property

$ 1 – 999,999,997 → GO TO W65CKPT
DK/RF → GO TO W61

(WEB) Altogether, since January [P2YEAR], how much money did you [or anyone in your family living there] spend on real estate, not including any mortgages on any of the properties?

$ 1 – 999,999,997 .00 → GO TO W65CKPT
NA → GO TO W61W63_W

CHECK: Please enter a number from 1 to 999999997.

W61. (CATI ONLY) Was it $60,000 or more?

1. Yes
5. No

DK/RF → GO TO W65CKPT

W62. (CATI ONLY) $120,000 or more?

1. Yes
5. No

DK/RF

→ GO TO W65CKPT

W63. (CATI ONLY) $30,000 or more?

1. Yes
5. No

DK/RF

→ GO TO W65CKPT

W61W63_W. (WEB ONLY) What is your best estimate?

1. Less than $30,000
2. $30,000 to less than $60,000
W65CKPT. CAI Checkpoint: Whether Sold Only or Both Bought & Sold Real Estate

<table>
<thead>
<tr>
<th>W59A=2</th>
<th>W59A=1, 5, DK, RF, NA</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>GO TO W69</td>
</tr>
</tbody>
</table>

W65. *(CATI)* Altogether, (since January [P2YEAR]), what was the net amount you [or anyone in your family living there] received from selling real estate?

- **If needed:** Real estate [A19=OWNS: other than [your main home,] such as a vacation home, land (not including farmland), or rental property

W66. *(CATI ONLY)* Was it $60,000 or more?

<table>
<thead>
<tr>
<th>W67. <em>(CATI ONLY)</em> $120,000 or more?</th>
<th>W68. <em>(CATI ONLY)</em> $30,000 or more?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Yes</td>
<td>1. Yes</td>
</tr>
<tr>
<td>5. No</td>
<td>5. No</td>
</tr>
<tr>
<td>DK/RF</td>
<td>DK/RF</td>
</tr>
<tr>
<td>GO TO W69</td>
<td>GO TO W69</td>
</tr>
</tbody>
</table>

Home Improvements

W69. *(CATI)* (Since January [P2YEAR], did you [or anyone in your family living there]...)

Make additions or improvements totaling $10,000 or more to any homes or other real estate [you / any of you] owned? Do not count general maintenance or upkeep.

<table>
<thead>
<tr>
<th>GO TO W73A</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Yes</td>
</tr>
<tr>
<td>5. No</td>
</tr>
<tr>
<td>GO TO W70</td>
</tr>
</tbody>
</table>

(WEB) Since January [P2YEAR], did you [or anyone in your family living there] make additions or improvements totaling $10,000 or more to any homes or other real estate [you / any of you] owned? Do not count general maintenance or upkeep.

<table>
<thead>
<tr>
<th>GO TO W73A</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Yes</td>
</tr>
<tr>
<td>5. No</td>
</tr>
<tr>
<td>GO TO W70</td>
</tr>
</tbody>
</table>

W70. *(CATI)* What was the total dollar cost of the additions or improvements, plus the value of any work you may have done yourself?
$10,000 – 999,999,997 \rightarrow GO TO W73A  \quad \text{DK/RF} \rightarrow GO TO W71

(WEB) What was the total dollar cost of the additions or improvements, plus the value of any work you may have done yourself?

$\quad 10,000 – 999,999,997 \quad .00 \quad \rightarrow GO TO W73A  \quad \text{NA} \quad \rightarrow GO TO W71W72_W

CHECK: Please enter a number from 10000 to 999999997.

W71. (CATI ONLY) Was it $25,000 or more?

1. Yes  \quad 5. No  \quad \text{DK/RF} \\
\downarrow  \quad \rightarrow GO TO W73A

W72. (CATI ONLY) $75,000 or more?

1. Yes  \quad 5. No  \quad \text{DK/RF} \\
\rightarrow GO TO W73A

W71W72_W. (WEB ONLY) What is your best estimate?

1. Less than $25,000  \quad 2. $25,000 to less than $75,000  \quad 3. $75,000 or more

Buy or Sell Business or Farm

W73A. (CATI) (Since January [P2YEAR], did you [or anyone in your family living there]...)

Put money into or sell part or all of your interest in a business or farm?

- If R says only "Yes", PROBE: Did you put money in only, sell only, or both?

1. Yes, put money in only  \quad 2. Yes, sold only  \quad 3. Yes, both put money in and sold  \quad 5. No, neither  \quad \text{DK/RF} \\
\rightarrow GO TO W74  \quad \rightarrow GO TO W79CKPT  \quad \rightarrow GO TO W74  \quad \rightarrow GO TO W79CKPT

(WEB) Since January [P2YEAR], did you [or anyone in your family living there] put money into or sell part or all of your interest in a business or farm?

1. Yes, put money in only  \quad 2. Yes, sold only  \quad 3. Yes, both put money in and sold  \quad 5. No, neither  \quad \text{NA} \\
\rightarrow GO TO W74  \quad \rightarrow GO TO W79CKPT  \quad \rightarrow GO TO W74  \quad \rightarrow GO TO W79CKPT

W74. (CATI) Altogether, how much money did you [or anyone in your family living there] put into a business or farm (since January [P2YEAR])?

$1 – 999,999,997 \rightarrow GO TO W79CKPT  \quad \text{DK/RF} \rightarrow GO TO W75

(WEB) Altogether, how much money did you [or anyone in your family living there] put into a business or farm since January [P2YEAR]?

$1 – 999,999,997 \quad .00 \quad \rightarrow GO TO W79CKPT  \quad \text{NA} \quad \rightarrow GO TO W75W77_W

CHECK: Please enter a number from 1 to 999999997.

W75. (CATI ONLY) Was it $25,000 or more?

1. Yes  \quad 5. No  \quad \text{DK/RF} \rightarrow GO TO W79CKPT

\downarrow  \quad \rightarrow W76. (CATI ONLY) $100,000 or more? \quad W77. (CATI ONLY) $10,000 or more?

1. Yes  \quad 5. No  \quad \text{DK/RF} \\
\rightarrow GO TO W79CKPT  \quad \rightarrow GO TO W79CKPT

W75W77_W. (WEB ONLY) What is your best estimate?

1. Less than $10,000  \quad 2. $10,000 to less than $25,000
W79CKPT. CAI Checkpoint: Whether Sold Only or Both Put Money in & Sold Farm/Business

1. Sold Only or Both Put in & Sold (W73A=2, 3)  5. All Others (W73A=1, 5, DK, RF, NA)  → GO TO W83A

W79. (CATI) Altogether, how much money did you [or anyone in your family living there] get from selling a business or farm (since January [P2YEAR])?

$ 1 – 999,999,997  → GO TO W83A  DK/RF  → GO TO W80

(WEB) Altogether, how much money did you [or anyone in your family living there] get from selling a business or farm since January [P2YEAR]?

$ 1 – 999,999,997.00  → GO TO W83A  NA  → GO TO W80W82_W

CHECK: Please enter a number from 1 to 999999997.

W80. (CATI ONLY) Was it $25,000 or more?

1. Yes  5. No  DK/RF  → GO TO W83A

W81. (CATI ONLY) $100,000 or more?

1. Yes  5. No  DK/RF  → GO TO W83A

W82. (CATI ONLY) $10,000 or more?

1. Yes  5. No  DK/RF  → GO TO W83A

W80W82_W. (WEB ONLY) What is your best estimate?

1. Less than $10,000  2. $10,000 to less than $25,000
3. $25,000 to less than $100,000  4. $100,000 or more

Buy or Sell Stock

W83A. (CATI) (Since January [P2YEAR], did you [or anyone in your family living there]...)

Buy or sell any shares of stock in publicly held corporations, stock mutual funds, or investment trusts, including any automatic reinvestments - not including any retirement accounts?

• If R says “Yes”, PROBE: Did you buy only, sell only, or both?

1. Yes, bought only  2. Yes, sold only  3. Yes, both bought and sold  5. No, neither  DK/RF

GO TO W91  GO TO W97CKPT  GO TO W91  GO TO W97CKPT

(WEB) Since January [P2YEAR], did you [or anyone in your family living there] buy or sell any shares of stock in publicly held corporations, stock mutual funds, or investment trusts, including any automatic reinvestments – not including any Individual Retirement Accounts (IRAs)?

1. Yes, bought only  2. Yes, sold only  3. Yes, both bought and sold  5. No, neither  NA

GO TO W91  GO TO W97CKPT  GO TO W91  GO TO W97CKPT

W91. (CATI) Altogether, how much money did you [or anyone in your family living there] spend on (shares of) stocks (since January [P2YEAR])?

$ 1 – 999,999,997  → GO TO W97CKPT  DK/RF  → GO TO W92

(WEB) How much money did you [or anyone in your family living there] spend on shares of stocks since January [P2YEAR]?
$ \text{1} – \text{999}, \text{999}, \text{997}.00 \rightarrow \text{GO TO W97CKPT} \quad \text{NA} \rightarrow \text{GO TO W92W95_W}

**CHECK**: Please enter a number from 1 to 999999997.

### W92. (CATI ONLY) Was it $20,000 or more?

- **1. Yes**
- **5. No**

### W93. (CATI ONLY) $50,000 or more?

- **1. Yes**
- **5. No**

### W94. (CATI ONLY) $100,000 or more?

- **1. Yes**
- **5. No**

### W92W95_W. (WEB ONLY) What is your best estimate?

- **1. Less than $5,000**
- **2. $5,000 to less than $20,000**
- **3. $20,000 to less than $50,000**
- **4. $50,000 to less than $100,000**
- **5. $100,000 or more**

### W97CKPT. CAI Checkpoint: Whether Sold Only or Both Bought & Sold Stock

- **1. Sold Only or Both Bought & Sold (W83A=2, 3)**
- **5. All Others (W83A=1, 5, DK, RF, NA)**

### W97. (CATI) Altogether, how much money did you [or anyone in your family living there] get from selling (shares of) stocks (since January [P2YEAR])?

- **$ \text{1} – \text{999}, \text{999}, \text{997}.00 \rightarrow \text{GO TO W102CKPT}**
- **DK/RF \rightarrow \text{GO TO W98}**

- **(WEB) Altogether, how much money did you [or anyone in your family living there] get from selling shares of stocks since January [P2YEAR]?**

- **$ \text{1} – \text{999}, \text{999}, \text{997}.00 \rightarrow \text{GO TO W102CKPT}**
- **NA \rightarrow \text{GO TO W98W101_W}**

**CHECK**: Please enter a number from 1 to 999999997.

### W98. (CATI ONLY) Was it $20,000 or more?

- **1. Yes**
- **5. No**

### W99. (CATI ONLY) $50,000 or more?

- **1. Yes**
- **5. No**

### W100. (CATI ONLY) $100,000 or more?

- **1. Yes**
- **5. No**

### W98W101_W. (WEB ONLY) What is your best estimate?

- **1. Less than $5,000**
- **2. $5,000 to less than $20,000**
Assets or Debts from Movers-In or Movers-Out

W102CKPT. CAl Checkpoint: Whether There are Movers-Out Age 18+ Years Old (Family Listing)

1. Movers-Out Age 18+  5. All Others  → GO TO W112CKPT

W102. (CATI) Sometimes changes in a family’s savings or assets are due to people joining or leaving the family. Was there anyone living with you in January [P2YEAR] who doesn’t live with you now and who took $5,000 or more in assets or debts away with them?

1. Yes  5. No  → GO TO W112CKPT

GO TO W103

(WEB) Sometimes changes in a family’s savings or assets are due to people joining or leaving the family. Was there anyone living with you in January [P2YEAR] who doesn’t live with you now and who took $5,000 or more in assets or debts away with them?

1. Yes  5. No  → GO TO W112CKPT

GO TO W103

W103. (CATI) Altogether, what is the total dollar value of assets that were removed that way?

$0 – 999,999,997  → GO TO W108  DK/RF  → GO TO W104

(WEB) Altogether, what is the total dollar value of assets that were removed that way?

$0 – 999,999,997.00  → GO TO W108  NA  → GO TO W104W107_W

CHECK: Please enter a number from 0 to 999999997.

W104. (CATI ONLY) Was it $10,000 or more?

1. Yes  5. No  DK/RF  → GO TO W108

W105. (CATI ONLY) $25,000 or more?

1. Yes  5. No  DK/RF  → GO TO W108

W107. (CATI ONLY) $5,000 or more?

1. Yes  5. No  DK/RF  → GO TO W108

W106. (CATI ONLY) $100,000 or more?

1. Yes  5. No  DK/RF  → GO TO W108

W104W107_W. (WEB ONLY) What is your best estimate?

1. Less than $5,000  2. $5,000 to less than $10,000
3. $10,000 to less than $25,000  4. $25,000 to less than $100,000
5. $100,000 or more
W108. *(CATI)* Altogether, what is the total dollar value of debts that were removed that way?

- $0–999,999,997 → GO TO W112CKPT
- DK/RF → GO TO W109

*SIGNAL for W103 + W108 < $5,000: Reported assets and debts removed total less than $5,000. Please verify amounts at W103 and W108.*

*(WEB)* Altogether, what is the total dollar value of debts that were removed that way?

- $0–999,999,997 .00 → GO TO W112CKPT
- NA → GO TO W109W111_W

*CHECK:* Please enter a number from 0 to 999999997.

W109. *(CATI ONLY)* Was it $10,000 or more?

- 1. Yes → W110. *(CATI ONLY)* $25,000 or more?
- 5. No DK/RF → GO TO W112CKPT

W110. *(CATI ONLY)* $25,000 or more?

- 1. Yes → W111. *(CATI ONLY)* $5,000 or more?
- 5. No DK/RF → GO TO W112CKPT

W111. *(CATI ONLY)* $5,000 or more?

- 1. Yes → GO TO W112CKPT
- 5. No DK/RF → GO TO W112CKPT

W109W111_W. *(WEB ONLY)* What is your best estimate?

- 1. Less than $5,000
- 2. $5,000 to less than $10,000
- 3. $10,000 to less than $25,000
- 4. $25,000 or more

W112CKPT. CAI Checkpoint: Whether There are Movers-In Age 18+ Years Old (Family Listing)

- 1. Movers-In Age 18+ → GO TO W123
- 5. All Others → GO TO W123

W113. *(CATI)* Is there anyone in your family living with you 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 → GO TO W114
- 5. No → GO TO W114

*(WEB)* Is there anyone in your family living with you 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 → GO TO W114
- 5. No → GO TO W114

W114. *(CATI)* Altogether, what is the total dollar value of assets that were brought into the family that way?

- $0–999,999,997 → GO TO W119
- DK/RF → GO TO W115

*(WEB)* Altogether, what is the total dollar value of assets that were brought into the family that way?

- $0–999,999,997 .00 → GO TO W119
- NA → GO TO W115W118_W

*CHECK:* Please enter a number from 0 to 999999997.
W115. (CATI ONLY) Was it $10,000 or more?

1. Yes
5. No

GO TO W119

↓

W116. (CATI ONLY) $25,000 or more?

1. Yes
5. No

GO TO W119

↓

W117. (CATI ONLY) $100,000 or more?

1. Yes
5. No

GO TO W119

↓

W118. (CATI ONLY) $5,000 or more?

1. Yes
5. No

GO TO W119

W115W118_W. (WEB ONLY) What is your best estimate?

1. Less than $5,000
2. $5,000 to less than $10,000
3. $10,000 to less than $25,000
4. $25,000 to less than $100,000
5. $100,000 or more

W119. (CATI) Altogether, what is the total dollar value of debts that were brought into the family that way?

$ 0 – 999,999,997 → GO TO W123

$0.00 → GO TO W123

NA → GO TO W120W122_W

CHECK: Please enter a number from 0 to 999999997.

W120. (CATI ONLY) Was it $10,000 or more?

1. Yes
5. No

GO TO W123

↓

W121. (CATI ONLY) $25,000 or more?

1. Yes
5. No

GO TO W123

↓

W122. (CATI ONLY) $5,000 or more?

1. Yes
5. No

GO TO W123

W120W122_W. (WEB ONLY) What is your best estimate?

1. Less than $5,000
2. $5,000 to less than $10,000
3. $10,000 to less than $25,000
4. $25,000 or more
Large Gifts & Inheritances

W123. **(CATI)** Some people’s assets come from gifts and inheritances. During the last two years, have you [or anyone in your family living there] received any large gifts or inheritances of money or property worth $10,000 or more?

1. Yes 5. No → GO TO SECTION P

**GO TO W123A**

**WEB** Some people’s assets come from gifts and inheritances. During the last two years, have you [or anyone in your family living there] received any large gifts or inheritances of money or property worth $10,000 or more? If multiple gifts or inheritances worth $10,000 or more were received, please report each one separately.

1. Yes 5. No → GO TO SECTION P

**GO TO W123A**

**SECTION_W.W123A_W128[1..3]** [1..3]=Which inheritance/gift

W123A. **(CATI)** Was that a gift or was that an inheritance? If multiple gifts or inheritances worth $10,000 or more were received, we can talk about each one separately.

1. Gift 2. Inheritance

**WEB** Was that a gift or was that an inheritance?

1. Gift 2. Inheritance

W124A. **(CATI)** What year did you [or anyone in your family living there] receive that? (If multiple gifts or inheritances worth $10,000 or more were received, we can talk about each one separately.)

- ENTER all that apply
- PROBE: Any others?
- ENTER [7] if it has not yet been received


**GO TO W125**  **GO TO W128**

**WEB** In what year did you [or anyone in your family living there] receive that?
Please select all that apply.


**GO TO W125**  **GO TO W128**

W125. **(CATI)** How much was [W123A=1: that gift / W123A=2: that inheritance / ALL OTHERS: it] worth altogether, at the time it was received? (If multiple gifts or inheritances worth $10,000 or more were received, we can talk about each one separately.)

$ 10,000 – 9,999,997 → GO TO W128  DK/RF → GO TO W126

**WEB** How much was [W123A=1: that gift / W123A=2: that inheritance / ALL OTHERS: it] worth altogether, at the time it was received?

$ 10,000 – 9,999,997 .00 → GO TO W128  NA → GO TO W126W127_W

CHECK: Please enter a number from 10000 to 9999997.
W126. (CATI ONLY) Would it amount to $25,000 or more?

1. Yes  5. No  DK/RF  

↓  GO TO W128

W127. (CATI ONLY) $75,000 or more?

1. Yes  5. No  DK/RF  

GO TO W128

W126W127_W. (WEB ONLY) What is your best estimate?

1. Less than $25,000  2. $25,000 to less than $75,000  3. $75,000 or more

W128. (CATI) Did you [or anyone in your family living there] receive any other large gifts or inheritances of money or property worth $10,000 or more in the last two years?

1. Yes  → REPEAT W123A -W127; Max=3;  5. No  

Then GO TO SECTION P  GO TO SECTION P

(WEB) Did you [or anyone in your family living there] receive any other large gifts or inheritances of money or property worth $10,000 or more in the last two years?

1. Yes  → REPEAT W123A - W126W127_W; Max=3;  5. No  

Then GO TO SECTION P  GO TO SECTION P

End W123A_W128
End SECTION_W
P0CKPT1. CAI Checkpoint: Employment Status of Reference Person

<table>
<thead>
<tr>
<th>Working Now (BCDE1=1, 2; or BCDE3=Yes)</th>
<th>Not Working Now (BCDE1&lt;&gt;1, 2 &amp; BCDE3&lt;&gt;Yes)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Never Worked (BCDE3A=Yes &amp; BC62=Yes)</td>
<td>Has Worked (BCDE3A=Yes; or BCDE3A&lt;&gt;Yes &amp; BC62=Yes)</td>
</tr>
<tr>
<td>3. Retired, Disabled, Keep House, Student, Other (BCDE1=4-8)</td>
<td>5. Unemployed (BCDE1=3, DK, RF, NA)</td>
</tr>
</tbody>
</table>

Pension from Current Employer

SECTION_P.SECTION_PDETAIL[1..2] [1]=Reference Person, [2]=Spouse-Partner

PDETAILAQSN. AQSN of Reference Person (Spouse-Partner). Assigned.

P1. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent) Current Employer: [EMPLOYER] [(SMONTH/SYEAR) – [EMONTH/EYEAR]]

[1st ITERATION: Next, I need to get some information about pensions and retirement plans.] Not including Social Security, Railroad Retirement, or I.R.A.s (Individual Retirement Accounts), [are you / is [REFERENCE PERSON] / is [SPOUSE-PARTNER]] participating in a pension or retirement plan through [your / his / her] present job [EMPLOYER NAME=RESPONSE: at [CMJ EMPLOYER]] [BC27=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]
- If R says there are multiple plans, ENTER [1]

1. Yes → GO TO P6CKPT

5. No → GO TO P42CKPT

GO TO P1A

(WEB) [RP LOOP, or SP LOOP & RP NOT ASKED: The following questions are about pensions and retirement plans.] Not including Social Security or Railroad Retirement, [are you / is [REFERENCE PERSON] / is [SPOUSE-PARTNER]] participating in a pension or retirement plan through [your / his / her] present job [EMPLOYER NAME=RESPONSE: at [CMJ EMPLOYER]] [BC27=YES: ; or through [your / his / her] union]?

1. Yes → GO TO P6CKPT

5. No → GO TO P42CKPT

GO TO P1A

No Plan With Current Employer

P1A. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent) Current Employer: [EMPLOYER] [(SMONTH/SYEAR) – [EMONTH/EYEAR]]

[Are you / Is he / Is she] currently eligible for such a plan?

1. Yes → GO TO P42CKPT

5. No → GO TO P42CKPT

GO TO P7

(WEB) [Are you / Is he / Is she] currently eligible for such a plan?

1. Yes → GO TO P42CKPT

5. No → GO TO P42CKPT

GO TO P7
P7. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
   Current Employer: [EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR])
   Will [you / he / she] become eligible for such a plan if [you / he / she] continue[s] to work for this employer?
   1. Yes  5. No
   GO TO P42CKPT

(WEB) Will [you / he / she] become eligible for such a plan if [you continue / he continues / she continues] to work for this employer?
   1. Yes  5. No
   GO TO P42CKPT

P6CKPT. CAI Checkpoint: Whether Eligible for Dependent Interviewing

1. Same CMJ (BC18.SAMECMJPRELOAD=1
   & NEWPRELOAD.PP6YRS=Response) → (Assign P6YRS=NEWPRELOAD + 2 Years)
   GO TO P11

5. All Others

Plan with Current Employer

P6YRS. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
   Plan Through Current Employer ([EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR]))
   How many years [have you / has he / has she] been participating in this plan?
   • ENTER [0] for “Less than one year”
   • If R says there are multiple plans, PROBE: Please tell me about the plan [you have / he has / she has] participated in the longest.
   • ENTER number of years in pension or retirement plan or PRES[ENTER] to go to the next screen to record the year started
   [ENTER] → GO TO P6YR
   0 – 97 DK/RF
   GO TO P11

(WEB) How many years [have you / has he / has she] been participating in this plan? Please tell us about the plan [you have / he has / she has] participated in the longest. For less than one year, please enter “0”.

0 – 97 Number of years NA → GO TO P6YR

GO TO P11

CHECK: Please enter a number from 0 to 97.

P6YR. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
   Plan Through Current Employer ([EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR]))
   (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 have / he has / she has] participated in the longest.
   • ENTER year started in pension or retirement plan
   1901 – [CYEAR]

(WEB) In which year did [you / he / she] start participating in this plan? Please tell us about the plan [you have / he has / she has] participated in the longest.

1901 – [CYEAR] Year
Plan with Current Employer

P11. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
Plan Through Current Employer ([EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR]))
[Are you / Is he / Is 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
GO TO P12

(WEB) [Are you / is he / is she] making any contributions to [your / his / her] pension or retirement account such as having money deducted from [your / his / her] pay?

1. Yes 5. No → GO TO P16
GO TO P12

P12. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
Plan Through Current Employer ([EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR]))
Are you / Is he / Is she required to contribute?

1. Yes 5. No → GO TO P15AMT
GO TO P13AMT

(WEB) Are you / is he / is she required to contribute?

1. Yes 5. No → GO TO P15AMT
GO TO P13AMT

P13AMT, P13PER, P13PCT. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
Plan Through Current Employer ([EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR]))
What amount or percent of pay [are you / is he / is 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

(What percent of pay [are you / is he / is she] required to contribute?)

- ENTER a percentage from 1.0 to 25.0

1.0 – 97.0

The amount entered is: [P13AMT] per _____

Select the unit of time below

- Week
- Two weeks
- Month
- Year
- Other-specify (P13PERSPEC. Specify, (String 100))

CHECK: Please enter a percentage from 1.0 to 25.0

CHECK: Please enter a percentage from 1.0 to 25.0

(web) How much [are you / is he / is she] required to contribute?

Please provide an amount or a percent of [your / his / her] pay.

P13AMT, P13PER. Default

To enter a percent (%) of [your / his / her] pay instead, click here.

$ 1 – 9,999,997 .00 per

CHECK: Please enter a number from 1 to 9999997.

P13PCT. Alternate

To enter an amount ($) instead, click here.

1.0 – 97.0 % of [my / his / her] pay

CHECK: Please enter a percentage from 1.0 to 25.0.

SIGNAL: Please select a unit of time.
Plan with Current Employer

P14. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

Plan Through Current Employer ([EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR]))

[Do you / Does he / Does she] also make voluntary contributions?

1. Yes 5. No → GO TO P16

GO TO P15AMT

(WEB) [Do you / Does he / Does she] also make voluntary contributions?

1. Yes 5. No → GO TO P16

GO TO P15AMT

P15AMT, P15PER, P15PCT. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

Plan Through Current Employer ([EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR]))

What amount or percent of pay [do you / does he / does 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] $ 1 – 9,999,997 DK/RF → GO TO P16

(What percent of pay [do you / does he / does she] voluntarily contribute currently?)

- ENTER a percentage from 1.0 to 50.0

1.0 – 97.0 7. Other-specified (P15PERSPEC. Specify. (String 100))

CHECK: Please enter a number from 1 to 9999997.

CHECK: Please enter a percentage from 1.0 to 50.0.

(WEB) How much [do you / does he / does she] voluntarily contribute currently?

Please provide an amount or a percent of [your / his / her] pay.

P15AMT, P15PER. Default

To enter a percent (%) of [your / his / her] pay instead, click here.

$ 1 – 9,999,997 .00 per 3. Week 4. Two weeks

CHECK: Please enter a number from 1 to 9999997.

5. Month 6. Year

Other - Please specify:
(P15PERSPEC)

CHECK: Please enter a percentage from 1.0 to 50.0.

SIGNAL: Please select a unit of time.

P15PCT. Alternate

To enter an amount ($) instead, click here.

1.0 – 97.0 % of [my / his / her] pay

CHECK: Please enter a percentage from 1.0 to 50.0.
Plan with Current Employer

P16. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

Plan Through Current Employer ([EMPLOYER] [[SMONTH/SYEAR] – [EMONTH/EYEAR]])

[SPOUSE-PARTNER LOOP & RP HAS PENSION W/CURRENT EMPLOYER: ]

Some pension and retirement plans base benefits on a formula involving age, years of service and salary. Other plans, such as a 401K, base benefits on how much money has accumulated in a person’s pension or retirement account. And some plans use both ways of setting benefits. [SPOUSE-PARTNER LOOP & RP HAS PENSION W/CURRENT EMPLOYER: ]

What type of plan [do you / does [REFERENCE PERSON] / does [SPOUSE-PARTNER]] have (through [CMJ EMPLOYER])?

- Defined Contribution plans include 401-K, 403-B, ESOP, SRA, thrift/savings, stock/profit sharing, money purchase plans, and target date funds (TDF)

1. Plan based on formula/ “Defined benefit” plan
5. Money accumulated in account/ “Defined contribution” plan
7. Both

[DK/RF] → GO TO P22CKPT

GO TO P22CKPT

(Web) Some pension and retirement plans base benefits on a formula involving age, years of service, and salary. Other plans, such as a 401K, base benefits on how much money has accumulated in a person’s pension or retirement account. And some plans use both ways of setting benefits.

What type of plan [do you / does [REFERENCE PERSON] / does [SPOUSE-PARTNER]] have [EMPLOYER NAME=RESPONSE: through [CMJ EMPLOYER]]?

Defined contribution plans include 401-K, 403-B, ESOP, SRA, thrift/savings, stock/profit sharing, and money purchase plans.

1. Plan based on a formula/ “Defined benefit” plan
5. Plan based on money accumulated in an account/ “Defined contribution” plan
7. Both

[NA] → GO TO P22CKPT

GO TO P22CKPT

Plan with Current Employer - Defined Contribution (P16=DC Only or Both)

P17. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

Plan Through Current Employer ([EMPLOYER] [[SMONTH/SYEAR] – [EMONTH/EYEAR]])

Does [your / his / her] employer make contributions to [your / his / her] account?

1. Yes
5. No

→ GO TO P20

GO TO P18AMT

(Web) Does [your / his / her] employer make contributions to [your / his / her] account?

1. Yes
5. No

→ GO TO P20

GO TO P18AMT
Plan Through Current Employer ([EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR]))

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 → GO TO P20

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 P20

CHECK: Please enter a percentage from 1.0 to 25.0.

(P18PCT. Alternate)

To enter an amount ($) instead, click here.
To enter a percent (%) of [your / his / her] contribution instead, click here.
1.0 – 997.0 % of [your / his / her] contribution
CHECK: Please enter a percentage from 1.0 to 200.0.

WEB) How much does [your / his / her] employer contribute to [your / his / her] account?
Please provide an amount, a percent of [your / his / her] pay, or a percent of [your / his / her] contribution.

(P18AMT, P18PER. Default)

To enter a percent (%) of [your / his / her] pay instead, click here.
To enter a percent (%) of [your / his / her] contribution instead, click here.
$1 – 9,999,997 .00 per

CHECK: Please enter a number from 1 to 9999997.

(P18PCTB. Alternate)

To enter an amount ($) instead, click here.
To enter a percent (%) of [your / his / her] contribution instead, click here.
1.0 – 997.0 % of [your / his / her] contribution
CHECK: Please enter a percentage from 1.0 to 200.0.
P20. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
Plan Through Current Employer ([EMPLOYER]) ([SMONTH/SYEAR] – [EMONTH/EYEAR])
What is the approximate dollar amount in [your / his / her] account now?
$ 1 – 999,999,997 DK/RF → GO TO P20B
GO TO P20A

(WEB) What is the approximate dollar amount in [your / his / her] account now?
$ 1 – 999,999,997 .00 NA → GO TO P20BP20E_W
GO TO P20A

CHECK: Please enter a number from 1 to 999999997.

P20B. (CATI ONLY) Is it $25,000 or more?
1. Yes
5. No DK/RF → GO TO P20A

P20C. (CATI ONLY) $75,000 or more?
1. Yes
5. No DK/RF → GO TO P20A

P20D. (CATI ONLY) $200,000 or more?
1. Yes
5. No DK/RF

P20BP20E_W. (WEB ONLY) What is your best estimate?
1. Less than $5,000
2. $5,000 to less than $25,000
3. $25,000 to less than $75,000
4. $75,000 to less than $200,000
5. $200,000 or more

P20A. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
Plan Through Current Employer ([EMPLOYER]) ([SMONTH/SYEAR] – [EMONTH/EYEAR])
Are the funds invested mostly in stocks and stock mutual funds, mostly in interest earning assets, or some of each?
1. Mostly stocks
2. Some of each
3. Mostly interest earning assets

(WEB) Are the funds invested...?
1. Mostly in stocks and stock mutual funds
2. Some of each
3. Mostly in interest earning assets

P22CKPT. CAI Checkpoint: Type of Pension; Whether 40 Years Old or Older
Plan with Current Employer - Defined Benefit - Age 40+ (P16=DB Only or Both)

P32. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
Plan Through Current Employer ([EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR]))

[P16=BOTH: (For the part of [your / his/ her] pension or retirement plan where benefits are based on a formula,) at / ALL OTHERS: At] what age [do you / does he / does she] expect to start receiving retirement benefits from this pension or retirement plan?

[18 / [CURRENT AGE]] – 996

0 997. Never expect to receive benefits from this plan (SP_0A) DK/RF

GO TO P34AMT

GO TO P39AGE

(WEIf At what age [do you / does he / does she] expect to START RECEIVING retirement benefits from this pension or retirement plan?

[18 / [CURRENT AGE]] – 996 Age

0 997. [I / He / She] never expect[s] to receive benefits from this plan (SP_0A) NA

GO TO P34AMT

GO TO P39AGE

CHECK: Please enter an age [AGEIWDATE] or older.

P34AMT, P34PER, P34PCT. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE]

[[Respondent]]
Plan Through Current Employer ([EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR]))

[P16=BOTH: (For the part of [your / his/ her] pension or retirement plan where benefits are based on a formula,) how / How] much [do you / does he / does 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]

$ 1 – 9,999,997 DK/RF → GO TO P34F

The amount entered is: [P34AMT] per ___

• SELECT the unit of time below

5. Month
6. Year
7. Other-specify (P34PERSPEC. Specify. (String 100))

GO TO P39AGE

(WEIf How much [do you / does he / does she] expect to receive?
Please provide an amount or a percent of [your / his / her] pay at retirement.

P34AMT, P34PER. Default

To enter a percent (%) of [your / his / her] pay instead, click here.

$ 1 – 9,999,997 .00 per

5. Month 6. Year NA → GO TO P34FP34J_W

CHECK: Please enter a number from 1 to 9999997.

SIGNAL: Please select a unit of time.

P34PCT. Alternate

To enter an amount ($) instead, click here.

1.0 – 100.0 % of [your / his / her] pay

NA → GO TO P34FP34J_W

CHECK: Please enter a percentage from 1.0 to 100.0.

GO TO P39AGE
P34F. *(CATI ONLY)* Will it be 40% of [your / his / her] pay or more?

1. Yes
↓

5. No [DK/RF] → GO TO P39AGE

P34G. *(CATI ONLY)* 60% or more (of [your / his / her] pay)?

1. Yes
↓

P34J. *(CATI ONLY)* 20% or more (of [your / his / her] pay)?

1. Yes
↓

5. No [DK/RF] → GO TO P39AGE

P34H. *(CATI ONLY)* 80% or more (of [your / his / her] pay)?

1. Yes
↓

P34FP 34J_W. *(WEB ONLY)* What is your best estimate?

1. Less than 20% of [your / his / her] pay
2. 20% to less than 40% of [your / his / her] pay
3. 40% to less than 60% of [your / his / her] pay
4. 60% to less than 80% of [your / his / her] pay
5. 80% or more of [your / his / her] pay

Plan with Current Employer - Age 40+

P39AGE. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] *(Respondent)*
Plan Through Current Employer ([EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR]))

On [your / his / her] present job ([EMPLOYER NAME]=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 – 97 → GO TO P40CKPT

[CHECK]: Please enter a number from 20 to 75.

P39YRS. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] *(Respondent)*
Plan Through Current Employer ([EMPLOYER] ([SMONTH/SYEAR] – [EMONTH/EYEAR]))

(What is the usual number of years of service for retirement?)
- ENTER number of years

1 – 97

[CHECK]: Please enter a number from 1 to 50.

*(WEB)* On [your / his / her] present job [EMPLOYER NAME=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? Please provide an age or a number of years.

P39AGE. Default

To enter a number of years instead, click here.

20 – 97 Age

CHECK: Please enter a number from 20 to 75.

P39YRS. Alternate

To enter an age instead, click here.

1 – 97 Number of years

CHECK: Please enter a number from 1 to 50.
Plan with Current Employer - Age 40+

P40AGE, P40NUM. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]


Now I want to ask about [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] plans for retirement. At what age [do you / does he / does she] plan to stop working?

- ENTER age or press [ENTER] to continue to next screen for number of years

<table>
<thead>
<tr>
<th>[ENTER]</th>
<th>[CURRENT AGE] – 995</th>
<th>0 996. Already stopped working (VOL) (SP_0B)</th>
<th>DK/RF</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>0 997. Never plan to stop working (VOL) (SP 0A)</td>
<td></td>
</tr>
</tbody>
</table>

(In how many years [do you / does he / does she] plan to stop working?)

- ENTER number of years

<table>
<thead>
<tr>
<th>[CURRENT AGE] – 995</th>
<th>Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 996. [I / He / She] already stopped working (SP_0B)</td>
<td></td>
</tr>
<tr>
<td>0 997. [I / He / She] never plan[s] to stop working (SP 0A)</td>
<td></td>
</tr>
</tbody>
</table>

CHECK: Please enter a number from 1 to 50.

WEB) These next questions are about [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] plans for retirement. At what age or in how many years [do you / does he / does she] PLAN to stop working? Please provide an age or a number of years.

P40AGE. Default

To enter a number of years instead, click here.

<table>
<thead>
<tr>
<th>[CURRENT AGE] – 995</th>
<th>Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 996. [I / He / She] already stopped working (SP_0B)</td>
<td></td>
</tr>
<tr>
<td>0 997. [I / He / She] never plan[s] to stop working (SP 0A)</td>
<td></td>
</tr>
</tbody>
</table>

CHECK: Please enter an age [AGEIWDATE] or older.

P40NUM. Alternate

To enter an age instead.

<table>
<thead>
<tr>
<th>1 – 97</th>
<th>Number of years</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 996. [I / He / She] already stopped working (SP_0B)</td>
<td></td>
</tr>
<tr>
<td>0 997. [I / He / She] never plan[s] to stop working (SP 0A)</td>
<td></td>
</tr>
</tbody>
</table>

CHECK: Please enter a number from 1 to 50.

P42CKPT. CAI Checkpoint: Employment Status (Section BC)

1. Working Now (BCDE1=1, 2 or BCDE3=Yes) 5. All Others → GO TO P42CKPT
### Other Tax-Deferred Plans

**P42. (CATI)** `[CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

Other Plan(s) Through Current Employer (EMPLOYER) (SMonth/SYear – EMonth/EYear)

<table>
<thead>
<tr>
<th>P1=YES: In addition to the pension or retirement plan you already mentioned, [do you / does [REFERENCE PERSON] / does [SPOUSE-PARTNER]] / ALL OTHERS: [Do you / Does [REFERENCE PERSON] / Does [SPOUSE-PARTNER]] have any tax-deferred compensation or savings plans on [your / his / her] present job, such as a “thrift”, profit-sharing, or Keogh plan?</th>
<th>1. Yes</th>
<th>5. No → GO TO P45</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO P43</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**(WEB) P1=YES:** In addition to the pension or retirement plan you already mentioned, [do you / does [REFERENCE PERSON] / does [SPOUSE-PARTNER]] / ALL OTHERS: Do you / Does [REFERENCE PERSON] / Does [SPOUSE-PARTNER]] have any tax-deferred compensation or savings plans on this job, such as a “thrift,” profit-sharing, or Keogh plan?

<table>
<thead>
<tr>
<th>1. Yes</th>
<th>5. No → GO TO P45</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO P43</td>
<td></td>
</tr>
</tbody>
</table>

**P43. (CATI)** `[CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

Other Plan(s) Through Current Employer (EMPLOYER) (SMonth/SYear – EMonth/EYear)

Does [your / his / her] employer make contributions to any such plan for [you / him / her]?

<table>
<thead>
<tr>
<th>1. Yes</th>
<th>5. No → GO TO P45</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO P44AMT</td>
<td></td>
</tr>
</tbody>
</table>

**(WEB) Does [your / his / her] employer make contributions to any such plan for [you / him / her]?

<table>
<thead>
<tr>
<th>1. Yes</th>
<th>5. No → GO TO P45</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO P44AMT</td>
<td></td>
</tr>
</tbody>
</table>
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 employer contribution

### Other Plan(s) Through Current Employer

What percent of pay does [your / his / her] employer contribute?

- ENTER a percentage of pay from 1.0 to 25.0
- OR press [ENTER] to continue to next screen for Percent of employee contribution

### Other Plan(s) Through Current Employer

What percent of [your / his / her] contribution does [your / his / her] employer contribute?

- ENTER a percentage of employee contribution from 1.0 to 200.0

**CHECK:** Please enter a percentage from 1.0 to 25.0.

**CHECK:** Please enter a percentage from 1.0 to 200.0.

**WEB:** How much does [your / his / her] employer contribute?

Please provide an amount, a percent of [your / his / her] pay, or a percent of [your / his / her] contribution.
Pensions from Former Employers


P45. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

[LOOP 2 & SP NOT WORKING NOW: (These next questions are about [your / [SPOUSE-PARTNER]’s] pensions or retirement plans through a former employer.)] / ALL OTHERS: These next questions are about [your / [REFERENCE PERSON]’s] pensions or retirement plans through a former employer."

Aside from I.R.A. (Individual Retirement Account) or Keogh Plans already reported, [do you / does [REFERENCE PERSON] / does [SPOUSE-PARTNER]] have any pensions or retirement plans from previous employers from which [G40=RETIREMENT PLAN, PENSION, or IRA: [you have / he has / she has] not begun to receive regular benefit payments but expect[s] to receive benefits / G40<>RETIREMENT PLAN, PENSION, or IRA: [you / he / she] expect[s] to receive benefits]

1. Yes 5. No → GO TO P70CKPT

GO TO P45A

(Web) These next questions are about [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] pensions or retirement plans through a former employer.

Aside from Individual Retirement Accounts (IRAs) or Keogh Plans already reported, [do you / does [REFERENCE PERSON] / does [SPOUSE-PARTNER]] have any pensions or retirement plans from previous employers from which [G40=RETIREMENT PLAN, PENSION, or IRA: [you have / he has / she has] not begun to receive regular benefit payments but expect[s] to receive benefits / G40<>RETIREMENT PLAN, PENSION, or IRA: [you / he / she] expect[s] to receive benefits]

1. Yes 5. No → GO TO P70CKPT

GO TO P45A

P45A. (CATI) [CYNAMF] [CYNAML]; [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

How many such (pension or retirement) plans (through a former employer) [do you / does he / does she] have from which [you / he / she] expect[s] to receive benefits?

1 – 7

(Web) How many such pension or retirement plans through a former employer [do you / does he / does she] have from which [you / he / she] expect[s] to receive benefits?

1 – 7  Number of plans

CHECK: Please enter a number from 1 to 7.
Plan #1 [1 / 2] Through a Former Employer

[1st PENSION FROM A FORMER EMPLOYER: [P1=YES: What type of plan was this second pension or retirement plan? / P1<><YES: I would like to know what type of plan this was.] [SPOUSE-PARTNER LOOP: ( ) One that bases benefits on a formula involving age, years of service and salary, or one that bases benefits on how much money has accumulated in a person’s pension or retirement account, such as a 401K [SPOUSE-PARTNER LOOP: )]? / 2nd PENSION FROM A FORMER EMPLOYER: I would like to know what type of plan this was. (One that bases benefits on a formula involving age, years of service and salary, or one that bases benefits on how much money has accumulated in a person’s pension or retirement account, such as a 401K?)]

- [P45A>1 PLAN: If needed: Tell us about the 2nd PENSION: next] most important plan
- Defined Contribution plans include 401-K, 403-B, ESOP, SRA, thrift/savings, stock/profit sharing, money purchase plans, and target date funds (TDF)

1. Plan based on formula/“Defined benefit” plan
5. Money accumulated in account/“Defined contribution” plan
7. Both DK RF → GO TO P70CKPT

GO TO P52
GO TO P62ACKPT

(WEB) [1st PENSION FROM A FORMER EMPLOYER: [P1=YES: Is this second pension or retirement plan a…? / P1<>YES: Does this pension or retirement plan base benefits on a formula involving age, years of service and salary, or does it base benefits on how much money has accumulated in a person’s pension or retirement account]? / 2nd PENSION FROM A FORMER EMPLOYER: Is this [P1=YES: third / P1<>YES: second] pension or retirement plan a…?]

1. Plan based on a formula/“Defined benefit” plan
5. Plan based on money accumulated in an account/“Defined contribution” plan
7. Both NA → GO TO P70CKPT

GO TO P52
GO TO P62ACKPT

Plan with Former Employer - Defined Contribution (P46=Both)

P47. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

Plan #1 [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 DK/RF → GO TO P47B

GO TO P48

(WEB) 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?

$1 – 99,999,997 .00 NA → GO TO P47BP47E_W

GO TO P48

CHECK: Please enter a number from 1 to 99999997.
P47B. *(CATI ONLY)* Was it $20,000 or more?

| 1. Yes | 5. No DK/RF | GO TO P48 |

↓

P47C. *(CATI ONLY)* $50,000 or more?

| 1. Yes | 5. No DK/RF | GO TO P48 |

↓

P47D. *(CATI ONLY)* $150,000 or more?

| 1. Yes | 5. No DK/RF | GO TO P48 |

P47BP47E_W. *(WEB ONLY)* What is your best estimate?

<table>
<thead>
<tr>
<th>1. Less than $5,000</th>
<th>2. $5,000 to less than $20,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>3. $20,000 to less than $50,000</td>
<td></td>
</tr>
<tr>
<td>4. $50,000 to less than $150,000</td>
<td></td>
</tr>
<tr>
<td>5. $150,000 or more</td>
<td></td>
</tr>
</tbody>
</table>

P47E. *(CATI ONLY)* $5,000 or more?

| 1. Yes | 5. No DK/RF | GO TO P48 |

↓

P47E. *(CATI ONLY)* $5,000 or more?

| 1. Yes | 5. No DK/RF | GO TO P48 |

↓

P47E. *(CATI ONLY)* $5,000 or more?

| 1. Yes | 5. No DK/RF | GO TO P48 |

P48. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[(Respondent)]

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 I.R.A. (Individual Retirement Account), 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 | 2. Rolled over into I.R.A. | 3. Left to accumulate | 4. Converted to annuity | 7. Other-specify (P48SPEC. Specify. (String 100)) DK/RF |

| GO TO P52 | GO TO P49 | GO TO P50 | GO TO P52 |

*(WEB)* When [you / he / she] left that employer, did [you / he / she] ...?

*If more than one selection applies, please select “Other” and enter the details.*

| 1. Withdraw the money | 2. Roll it over into an Individual Retirement Account (IRA) | 3. Leave it to accumulate | 4. Convert it to an annuity | 7. Other - Please specify: (P48SPEC) NA |

| GO TO P52 | GO TO P49 | GO TO P50 | NA | GO TO P52 |

P49. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[(Respondent)]

Plan #1 / 2 Through a Former Employer

How much is in [your / his / her] account now?

$ 1 – 99,999,997 DK/RF → GO TO P49B

GO TO P52

*(WEB)* How much is in [your / his / her] account now?

$ 1 – 99,999,997 00 NA → GO TO P49BP49E_W

GO TO P52

**CHECK:** Please enter a number from 1 to 99999997.
P49B. *(CATI ONLY)* Is it $50,000 or more?

1. Yes  
5. No  

DK/RF  → GO TO P52

↓

P49C. *(CATI ONLY)* $100,000 or more?

1. Yes  
5. No  

DK/RF  → GO TO P52

↓

P49D. *(CATI ONLY)* $200,000 or more?

1. Yes  
5. No  

DK/RF  → GO TO P52

P49BP49E_W. *(WEB ONLY)* What is your best estimate?

1. Less than $20,000  
2. $20,000 to less than $50,000  
3. $50,000 to less than $100,000  
4. $100,000 to less than $200,000  
5. $200,000 or more  

GO TO P52

P50. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

Plan #1 / 2] Through a Former Employer

How old [were you / was he / was 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 – 97

*(WEB)* How old [were you / was he / was she] when [you / he / she] started receiving the benefits from that annuity, or at what age will [you / he / she] begin receiving them?

20 – 97

Age

CHECK: Please enter a number from 20 to 97.

P51, P51PER. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

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  

DK/RF  → GO TO P51B

↓

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

*(WEB)* How much are the annuity benefits, or what will the benefits be once [you / he / she] begin[s] receiving them?

$1 – 9,999,997  

.00 per  

5. Month 6. Year  

NA  → GOTO P51BP51E_W

CHECK: Please enter a number from 1 to 9999997.

SIGNAL: Please select a unit of time.
P51B. (CATI ONLY) Are they $400 or more per month?

1. Yes  
5. No  

DK/RF  → GO TO P52

↓

P51C. (CATI ONLY) $1,200 or more (per month)?

1. Yes  
5. No  

DK/RF  → GO TO P52

↓

P51D. (CATI ONLY) $1,600 or more (per month)?

1. Yes  
5. No  

DK/RF  → GO TO P52

↓

P51BP51E_W. (WEB ONLY) What is your best estimate?

1. Less than $200 per month  
2. $200 to less than $400 per month  
3. $400 to less than $1,200 per month  
4. $1,200 to less than $1,600 per month  
5. $1,600 or more per month

Plan with Former Employer - Defined Benefit (P46=DB Only or Both)

P52. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

Plan #[1 / 2] Through a Former Employer

[P46=BOTH: 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 you / Does [REFERENCE PERSON] / Does [SPOUSE-PARTNER]] expect to receive benefits from this plan in the future, [are you / is he / is 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  
5. Lost benefits  

2. Receiving benefits now  
7. Other - Specify (P52SPEC. Specify. (String 100))

3. Received cash settlement  

4. Rolled over into I.R.A.  

GO TO P69

GO TO P52ACKPT

(WEB) [P46=BOTH: Now about the part of [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] pension or retirement plan where benefits are based on a formula.]

Which of the following are true for [you / him / her] from this plan?

Please select all that apply.

1. [I / he / she] expect[s] to receive benefits from this plan in the future  
5. [I / He / She] lost the benefits associated with this plan

2. [I am / he is / she is] receiving benefits from this plan now  
7. Other - Please specify: (P52SPEC)

3. [I / He / She] received a cash settlement from this plan  

4. [I / He / She] rolled this plan over into an Individual Retirement Account (IRA)  

GO TO P52ACKPT
PS2ACKPT. CAI Checkpoint: Whether Eligible for Dependent Interviewing

### Receiving Benefits (P52=2)

<table>
<thead>
<tr>
<th>Ineligible: More than One Plan; or Preloaded PP52/PP53YR Not Valid (P45A&lt;&gt;1 plan; or NEWPRELOAD.PP52&lt;&gt;2; or NEWPRELOAD.PP52=2 &amp; (NEWPRELOAD.PPLANS&gt;1 or NEWPRELOAD.PP53Yr&lt;&gt;Response)</th>
<th>Eligible: One Plan &amp; Preloaded PP52/PP53YR Valid (P45A=1 plan &amp; NEWPRELOAD.PP52=2 &amp; NEWPRELOAD.PPLANS=1 &amp; NEWPRELOAD.PP53Yr=Response)</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO P56ACKPT</td>
<td>(Assign PP53YR=NEWPRELOAD) GO TO P54</td>
</tr>
</tbody>
</table>

### Plan with Former Employer - Defined Benefit (P46=DB Only or Both)

**P53YR. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]**

Plan #1/2 Through a Former Employer

In what year did [you / he / she] start to receive these benefits?

- **ENTER the year below**

1901 – [CYEAR]

*WEB* In what year did [you / he / she] start to receive these benefits?

1901 – [CYEAR] Year

**P54, P54PER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]**

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 [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 DK/RF → GO TO P54B

The amount entered is: [P54] per ____

- **SELECT the unit of time below**

5. Month | 6. Year | 7. Other Specify (P54PERSPEC. Specify. (String 100))

GO TO P56ACKPT

*WEB* How much are the benefits, or what will the benefits be once [you / he / she] begin[s] receiving them?

$ 1 – 9,999,997 .00 per

CHECK: Please enter a number from 1 to 9999997.

5. Month | 6. Year | NA → GO TO P54BP54E_W

7. Other - Please specify: (P54PERSPEC)

SIGNAL: Please select a unit of time.

GO TO P56ACKPT
P54B. *(CATI ONLY)* Are they $400 or more per month?

1. Yes

5. No  DK/RF → GO TO P56ACKPT

↓

P54C. *(CATI ONLY)* $1,200 or more (per month)?

1. Yes

5. No  DK/RF

↓

GO TO P56ACKPT

P54E. *(CATI ONLY)* $200 or more (per month)?

1. Yes

5. No  DK/RF

↓

GO TO P56ACKPT

P54D. *(CATI ONLY)* $1,600 or more (per month)?

1. Yes

5. No  DK/RF

↓

GO TO P56ACKPT

P54BP54E_W. *(WEB ONLY)* What is your best estimate?

1. Less than $200 per month

2. $200 to less than $400 per month

3. $400 to less than $1,200 per month

4. $1,200 to less than $1,600 per month

5. $1,600 or more per month

P56ACKPT. CAI Checkpoint: Whether Eligible for Dependent Interviewing

<table>
<thead>
<tr>
<th>Received Cash Settlement (P52=3)</th>
<th>5. All Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Ineligible: More Than One Plan; or Preloaded PP52/PP57 Not Valid (P45A&lt;&gt;1 plan; or NEWPRELOAD.PP52&lt;&gt;3; or NEWPRELOAD.PP52=3 &amp; (NEWPRELOAD.PPLANS&gt;1 or NEWPRELOAD.PP57&lt;&gt;Response))</td>
<td>GO TO P58ACKPT</td>
</tr>
<tr>
<td>2. Eligible: One Plan &amp; Preloaded PP52/PP57 Valid (P45A=1 plan &amp; NEWPRELOAD.PP52=3 &amp; NEWPRELOAD.PPLANS=1 &amp; NEWPRELOAD.PP57=Response)</td>
<td>GO TO P58</td>
</tr>
</tbody>
</table>

Plan with Former Employer - Defined Benefit (P46=DB Only or Both)

P57. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[(Respondent)]

Plan #[1 / 2] Through a Former Employer

How much did that cash settlement amount to?

$ 1 – 9,999,997  DK/RF → GO TO P57B

GO TO P58

*(WEB)* How much did that cash settlement amount to?

$ 1 – 9,999,997  .00  NA → GO TO P57BP57E_W

GO TO P58

CHECK: Please enter a number from 1 to 9999997.
P57B. *(CATI ONLY)* Was it $6,000 or more?

1. Yes 5. No DK/RF → GO TO P58

P57C. *(CATI ONLY)* $60,000 or more?

1. Yes 5. No DK/RF

GO TO P58

P57D. *(CATI ONLY)* $250,000 or more?

1. Yes 5. No DK/RF

GO TO P58

P57E. *(WEB ONLY)* What is your best estimate?

1. Less than $2,000
2. $2,000 to less than $6,000
3. $6,000 to less than $60,000
4. $60,000 to less than $250,000
5. $250,000 or more

P58. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] ((Respondent))

Plan #1 [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 I.R.A.

7. Other - Specify (P58SPEC. Specify. (String 100))

(PWEB) What did you / he / she do with the money?

Please select all that apply.

1. [I / He / She] bought durables
2. [I / He / She] spent it
3. [I / He / She] saved or invested it
4. [I / He / She] paid off debt
5. [I / He / She] rolled it into an Individual Retirement Account (IRA)

7. Other - Please specify: (P58SPEC)

P58ACKPT. CAI CHECKPOINT: Whether Eligible for Dependent Interviewing

Rolled Into IRA (P52=4)

1. Ineligible: More Than One Plan; or Preloaded PP52/PP59 Not Valid (P45A<>1 plan; or NEWPRELOAD.PP52<>4; or NEWPRELOAD.PP52=4 & (NEWPRELOAD.PP52=4 & NEWPRELOAD.PP59<>Response))

2. Eligible: One Plan & Preloaded PP52/PP59 Valid (P45A=1 plan & NEWPRELOAD.PP52=4 & NEWPRELOAD.PPLANS=1 & NEWPRELOAD.PP59=Response)

GO TO P59ACKPT

5. All Others

GO TO P59ACKPT
Plan with Former Employer - Defined Benefit (P46=DB Only or Both)

P59. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] ([Respondent])

Plan #[1 / 2] Through a Former Employer

How much did that I.R.A. (Individual Retirement Account) rollover amount to?

$ 1 – 9,999,997 DK/RF → GO TO P59B

GO TO P59ACKPT

(WEB) How much did that Individual Retirement Account (IRA) rollover amount to?

$ 1 – 9,999,997.00 NA → GO TO P59BP59E_W

CHECK: Please enter a number from 1 to 9999997.

P59B. (CATI ONLY) Was it $6,000 or more?

1. Yes

5. No DK/RF → GO TO P59ACKPT

P59C. (CATI ONLY) $60,000 or more?

1. Yes

5. No DK/RF → GO TO P59ACKPT

P59D. (CATI ONLY) $250,000 or more?

1. Yes

5. No DK/RF

GO TO P59ACKPT

P59BP59E_W. (WEB ONLY) What is your best estimate?

1. Less than $2,000

2. $2,000 to less than $6,000

3. $6,000 to less than $60,000

4. $60,000 to less than $250,000

5. $250,000 or more

P59ACKPT. CAI Checkpoint: Whether Eligible for Dependent Interviewing

Expects Benefits (P52=1) 5. All Others

1. Ineligible: More Than One Plan; or Preloaded PP52/PP60 Not Valid (P45A<>1 plan; or NEWPRELOAD.PP52<>1; or NEWPRELOAD.PP52=1 & (NEWPRELOAD.PPLANS>1 or NEWPRELOAD.PP60<>Response))

2. Eligible: One Plan & Preloaded PP52/PP60 Valid (P45A=1 plan & NEWPRELOAD.PP52=1 & NEWPRELOAD.PPLANS=1 & NEWPRELOAD.PP60=Response)

(Assign P60=NEWPRELOAD) GO TO P61

GO TO P69
Plan with Former Employer - Defined Benefit (P46=DB Only or Both)

P60. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
Plan #[1 / 2] Through a Former Employer
For how many years altogether [were you / was he / was she] included in this plan?
• INCLUDE years with other employers if same plan.

1 – 97 (WEB) For how many years altogether [were you / was he / was she] included in this plan?

1 – 97 Number of years
CHECK: Please enter a number from 1 to 97.

P61. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
Plan #[1 / 2] Through a Former Employer
At what age [do you / does he / does she] expect to start receiving (the rest of [your / his / her]) benefits from this plan?

[20 / CURRENT AGE] – 96 DK/RF O 97. Already receiving benefits from this plan (SP_0A)
GO TO P62AMT GO TO P62ACKPT

(WEB) At what age [do you / does he / does she] expect to START receiving [your / his / her] benefits from this plan?

[CURRENT AGE] – 96 Age NA O 97. [I am / He is / She is] already receiving benefits from this plan (SP_0A)
GO TO P62AMT GO TO P62ACKPT
CHECK: Please enter an age [AGEIWDATE] or older.
Plan #1/2 Through a Former Employer

How much [do you / does he / does 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] $1 – 999,997 → GO TO P62F

(How much [do you / does he / does she] expect to receive, as a percent of [your / his / her] pay when [you / he / she] left that job?)

- ENTER a percentage of pay from 1.0 to 100.0
  1.0 – 100.0 → GO TO P62KCKPT
  5. Month 6. Year → GO TO P62F

CHECK: Please enter a percentage from 1.0 to 100.

WEB: How much [do you / does he / does she] expect to receive?

Please provide an amount or a percent of [your / his / her] pay.

P62AMT, P62PER. Default

To enter a percent (%) of [your / his / her] pay instead, click here.

$1 – 9,999,997 .00 per
5. Month 6. Year NA → GO TO P62FP62J_W

CHECK: Please enter a number from 1 to 9999997.

SIGNAL: Please select a unit of time.

GO TO P62ACKPT

P62PCT. Alternate

To enter an amount ($) instead, click here.

1.0 – 100.0 % of [my / his / her] pay NA → GO TO P62FP62J_W

CHECK: Please enter a percentage from 1.0 to 100.

GO TO P62KCKPT

P62F. (CATI ONLY) Will it be 40% of [your / his / her] pay or more?

1. Yes
5. No DK/RF → GO TO P62KCKPT

P62G. (CATI ONLY) 60% or more (of [your / his / her] pay)?

1. Yes 5. No DK/RF → GO TO P62KCKPT

P62J. (CATI ONLY) 20% or more (of [your / his / her] pay)?

1. Yes 5. No DK/RF → GO TO P62KCKPT

P62H. (CATI ONLY) 80% or more (of [your / his / her] pay)?

1. Yes 5. No DK/RF → GO TO P62KCKPT
P62FP62J_W. (WEB ONLY) What is your best estimate?

1. Less than 20% of [your / his / her] pay
2. 20% to less than 40% of [your / his / her] pay
3. 40% to less than 60% of [your / his / her] pay
4. 60% to less than 80% of [your / his / her] pay
5. 80% or more of [your / his / her] pay

P62KCKPT. CAI Checkpoint: Whether P62PCT or P62-FP62J is Response

1. P62PCT=Response
5. All Others → GO TO P62ACKPT

P62K, P62KPER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

Plan #1/2 Through a Former Employer

And what was [your / his / her] pay when [you / he / she] left that job?

$ 1.00 – 9,999,997.00 DK/RF → GO TO P62ACKPT

The amount entered is: [P62K] per ____

- SELECT the unit of time below
- 7. Other-specify (P62KPERSPEC. Specify. (String 100))

(WEB) What was [your / his / her] pay when [you / he / she] left that job?

$ 1.00 – 9,999,997.00 per

CHECK: Please enter a number from 1.00 to 99999997.00.

SIGNAL: Please select a unit of time.

P62ACKPT. CAI Checkpoint: Whether Pension Is DB Only or DC Only

1. DB Only (P46=1) 3. DC Only (P46=5) 5. All Others (P46=7, DK, RF, NA)

GO TO P69

Plan with Former Employer - Defined Contribution (P46=DC Only)

P63. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

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 DK/RF → GO TO P63B

GO TO P64

(WEB) How much money was in [your / his / her] account when [you / he / she] left that employer?

$ 1 – 9,999,997.00 NA → GO TO P63BP63E_W

GO TO P64

CHECK: Please enter a number from 1 to 999999997.
P63B. *(CATI ONLY)* Was it $20,000 or more?

1. Yes  
5. No  
→ GO TO P64

<table>
<thead>
<tr>
<th>P63C. <em>(CATI ONLY)</em> $50,000 or more?</th>
<th>P63E. <em>(CATI ONLY)</em> $5,000 or more?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Yes</td>
<td>1. Yes</td>
</tr>
<tr>
<td>5. No</td>
<td>5. No</td>
</tr>
<tr>
<td>DK/RF</td>
<td>DK/RF</td>
</tr>
<tr>
<td>GO TO P64</td>
<td>GO TO P64</td>
</tr>
</tbody>
</table>

P63D. *(CATI ONLY)* $150,000 or more?

1. Yes  
5. No  
→ GO TO P64

P63BP63E_W. *(WEB ONLY)* What is your best estimate?

1. Less than $5,000  
2. $5,000 to less than $20,000  
3. $20,000 to less than $50,000  
4. $50,000 to less than $150,000  
5. $150,000 or more

P64. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

*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 I.R.A. (Individual Retirement Account), 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

<table>
<thead>
<tr>
<th>1. Transferred to new employer</th>
<th>2. Rolled over into I.R.A.</th>
<th>3. Left to accumulate</th>
<th>4. Converted to annuity</th>
<th>7. Other specify (P64SPEC. Specify. (String 100))</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO P69</td>
<td>GO TO P65</td>
<td>GO TO P66</td>
<td>GO TO P69</td>
<td>DK/RF</td>
</tr>
</tbody>
</table>

*(WEB)* When [you / he / she] left that employer, did [you / he / she] ...?

If more than one selection applies, please select “Other” and enter the details.

<table>
<thead>
<tr>
<th>1. Transfer [your / his / her] account to a new employer</th>
<th>2. Roll it over into an Individual Retirement Account (IRA)</th>
<th>3. Leave it to accumulate in [your / his / her] old plan</th>
<th>4. Convert it to an annuity</th>
<th>7. Other – Please specify: (P64SPEC)</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO P69</td>
<td>GO TO P69</td>
<td>GO TO P65</td>
<td>GO TO P69</td>
<td>NA</td>
</tr>
</tbody>
</table>

P65. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

*Plan #1/2 Through a Former Employer*

How much is in [your / his / her] account now?

$ 1 – 99,999,997  
→ GO TO P65B

GO TO P69

*(WEB)* How much is in [your / his / her] account now?

$ 1 – 99,999,997 .00  
→ GO TO P65BP65E_W

GO TO P69

CHECK: Please enter a number from 1 to 99999997.
**P65B. (CATI ONLY) Is it $50,000 or more?**

| 1. Yes | 5. No DK/RF | → GO TO P69 |

**P65C. (CATI ONLY) $100,000 or more?**

| 1. Yes | 5. No DK/RF | → GO TO P69 |

**P65D. (CATI ONLY) $200,000 or more?**

| 1. Yes | 5. No DK/RF | → GO TO P69 |

**P65BP65E_W. (WEB ONLY) What is your best estimate?**

| 1. Less than $20,000 | 2. $20,000 to less than $50,000 |
| 3. $50,000 to less than $100,000 | 4. $100,000 to less than $200,000 |
| 5. $200,000 or more |

**P66. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]**

Plan #1/2 Through a Former Employer

How old [were you / was he / was 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 – 97

(WEB) How old [were you / was he / was she] when [you / he / she] started receiving the benefits from that annuity, or at what age will [you / he / she] begin[s] receiving them?

  20 – 97 Age

**CHECK:** Please enter an age from 20 to 97.

**P67, P67PER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]**

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 DK/RF | → GO TO P67B |

**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

(WEB) How much are the annuity benefits, or what will the benefits be once [you / he / she] begin[s] receiving them?

| $ 1 – 9,999,997 per | 5. Month | 6. Year | NA | → GO TO P67BP67E_W |

**CHECK:** Please enter a number from 1 to 9999997.

**SIGNAL:** Please select a unit of time.

GO TO P69
P67B. (CATI ONLY) Are they $400 or more per month?

1. Yes
2. No

GO TO P69

P67C. (CATI ONLY) $1,200 or more (per month)?

1. Yes
2. No

GO TO P69

P67D. (CATI ONLY) $1,600 or more (per month)?

1. Yes
2. No

GO TO P69

P67E. (CATI ONLY) $200 or more (per month)?

1. Yes
2. No

DK/RF → GO TO P69

P67BP67E_W. (WEB ONLY) What is your best estimate?

1. Less than $200 per month
2. $200 to less than $400 per month
3. $400 to less than $1,200 per month
4. $1,200 to less than $1,600 per month
5. $1,600 or more per month

GO TO P69

P69. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

[Do you / Does [REFERENCE PERSON] / Does [SPOUSE-PARTNER]] 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
2. No

GO TO P70CKPT

SIGNAL for P69<>YES & P45A=2-5: Earlier R reported more than one pension plan from a previous employer. Please verify. If R verifies more than one pension plan from a previous employer, select CLOSE and ENTER [1] at this question. If R verifies just one pension plan from a previous employer, select SUPPRESS to continue

(WEB) [Do you / Does [REFERENCE PERSON] / Does [SPOUSE-PARTNER]] have any other pensions or retirement plans from a former employer that you haven’t already reported?

1. Yes → REPEAT P46 - P68; Max=2; Then GO TO P70CKPT
2. No

GO TO P70CKPT

End P45_P69
End SECTION_PDETAIL

P70CKPT. CAI Checkpoint: Whether Spouse-Partner in FU

1. Spouse-Partner (CYFUHU=FU, FUMI & CYAQRTH=201-222)
2. No Spouse-Partner

GO TO SECTION H

P70ACKPT. CAI Checkpoint: Employment Status of Spouse-Partner

1. Working Now (BCDE1=1, 2; or BCDE3=Yes)
2. Never Worked (BCDE3A=Yes & BC62<>Yes)
3. Retired, Disabled, Keep House, Student, Other (BCDE1=4-8)
4. Has Worked (BCDE3A=Yes; or BCDE3A<>Yes & BC62=Yes)
5. Unemployed (BCDE1=3, DK, RF, NA)

REPEAT P42CKPT - P69;
Then GO TO SECTION H

End SECTION_P
Section H: Health

SECTION_H.H1_H23[1..2] [1]=Reference Person, [2]=Spouse-Partner

AQS. AQS of Reference Person (Spouse-Partner). Assigned.

General Health

H1. \((\text{CATI})\) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

Now I have a few questions about [your / [REFERENCE PERSON]'s / [SPOUSE-PARTNER]'s] health. Would you say [your / [REFERENCE PERSON]'s / [SPOUSE-PARTNER]'s] health in general is excellent, very good, good, fair, or poor?


(\text{WEB}) The next questions are about [your / [REFERENCE PERSON]'s / [SPOUSE-PARTNER]'s] health. Would you say [your / [REFERENCE PERSON]'s / [SPOUSE-PARTNER]'s] health in general is...?


H1A. \((\text{CATI})\) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

[RETURNING RP (SP): Since we last talked to you about [your / his / her] health, / NEW RP (SP): Compared to [your / his / her] health say, two years ago,] would you say that [your / his / her] health is better now, about the same, or worse?

1. Better  3. About the same  5. Worse | DK/RF 3. About the same  5. Worse | DK/RF

\text{GO TO} H1B  \text{GO TO} H1C

(\text{WEB}) Compared to your health say, two years ago, would you say that [your / his / her] health is...?

1. Better  3. About the same  5. Worse | NA 3. About the same  5. Worse | NA

\text{GO TO} H1B  \text{GO TO} H1C

H1B. \((\text{CATI})\) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

Is it much better or somewhat better?

1. Much better  2. Somewhat better

\text{GO TO} HC0VID1A

(\text{WEB}) Is it...?

1. Much better  2. Somewhat better

\text{GO TO} HC0VID1A

H1C. \((\text{CATI})\) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

Is it much worse or somewhat worse?

1. Much worse  2. Somewhat worse

(\text{WEB}) Is it...?

1. Much worse  2. Somewhat worse
COVID-19 Health Series

HCOVID1A. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

[LOOP 1: These next questions are about the COVID-19 pandemic that started in March 2020.]

[Have you / Has [REFERENCE PERSON] / Has [SPOUSE-PARTNER]] had a vaccine for COVID-19?

- Some COVID-19 vaccines require 2 shots: ENTER [1] if this person has received the first shot, whether or not they have received the second shot

1. Yes 5. No → GO TO HCOVID19

(WEB) [LOOP 1: These next questions are about the COVID-19 pandemic that started in March 2020.]

[Have you / Has [REFERENCE PERSON] / Has [SPOUSE-PARTNER]] had a vaccine for COVID-19?

Some COVID-19 vaccines require 2 shots: ENTER “Yes” if [you have / he has / she has] received the first shot, whether or not [you have / he has / she has] received the second shot.

1. Yes 5. No → GO TO HCOVID19

HCOVID18A. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

How many COVID-19 vaccinations [have you / has [REFERENCE PERSON] / has [SPOUSE-PARTNER]] had?

1 – 9

(WEB) How many COVID-19 vaccinations [have you / has [REFERENCE PERSON] / has [SPOUSE-PARTNER]] had?

1 – 9

HCOVID18. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

[Have you / Has [REFERENCE PERSON] / Has [SPOUSE-PARTNER]] had all COVID-19 vaccinations that are recommended and for which [you are / he is / she is] eligible?

- Some COVID-19 vaccines require 2 shots; you may be eligible for one or two booster shots, depending on your age, risk factors, and when you received your previous shot(s)

1. Yes 5. No

(WEB) [Have you / Has [REFERENCE PERSON] / Has [SPOUSE-PARTNER]] had ALL COVID-19 vaccinations that are recommended and for which [you are / he is / she is] eligible?

Some COVID-19 vaccines require 2 shots and one or two booster shots, depending on your age, risk factors, and when you received your previous shot(s).

1. Yes 5. No

HCOVID18MO, HCOVID18YR. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

In what month and year did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] receive [your / his / her] most recent COVID-19 vaccination or booster shot?

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


The month entered is: [HCOVID18MO]

- ENTER the year below

Select ▼ 2020 – [CYEAR]
(WEB) When [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] receive [your / his / her] MOST RECENT COVID-19 vaccination or booster shot?
If you do not know the month, please select the season.

Select [Month or Season]

Select [Year]
2020 – [CYEAR]

CHECK: Please enter a date before today.

HCOVID19. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
[Have you / Has [REFERENCE PERSON] / Has [SPOUSE-PARTNER]] had COVID-19?
• Remind R to include times when R thought or a doctor or other health professional diagnosed they probably had COVID-19

1. Yes 5. No → GO TO H2

(WEB) [Have you / Has [REFERENCE PERSON] / Has [SPOUSE-PARTNER]] had COVID-19?
Please include any time when [you / he/she] thought or a doctor or other health professional diagnosed that [you / he /she] PROBABLY had COVID-19.

1. Yes 5. No → GO TO H2

HCOVID20. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
[Have you / Has [REFERENCE PERSON] / Has [SPOUSE-PARTNER]] had COVID-19 more than once?
• Remind R to include times when R thought or a doctor or other health professional diagnosed they probably had COVID-19

1. Yes 5. No

(WEB) [Have you / Has [REFERENCE PERSON] / Has [SPOUSE-PARTNER]] had COVID-19 more than once?
Please include any time when [you / he/she] thought or a doctor or other health professional diagnosed that [you / he/she] PROBABLY had COVID-19.

1. Yes 5. No

HCOVID21MO, HCOVID21YR. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
In what month and year did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] [HCOVID20=1: last] have COVID-19?
• SELECT Month and [Enter] to go to next screen for year
• IF NECESSARY: What would be your best estimate?

Select [Month or Season]

The month entered is: [HCOVID21MO]
• ENTER the year below

Select [Year]
2020 – [CYEAR]

(WEB) When did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] [HCOVID20=1: last] have COVID-19?
If you do not know the month, please select the season.

Select [Month or Season]
HCOVID23. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] ([Respondent])

Has a doctor or other health professional [HCOVID20=1: ever] prescribed you antiviral treatments, monoclonal antibodies, or another treatment for COVID-19? This treatment could have been administered by pill, injection, or through an IV infusion.

- ENTER all that apply

1. Yes, prescribed antiviral treatments
2. Yes, prescribed monoclonal antibodies
3. Yes, prescribed another treatment
   Other-specify (HCOVID23SPEC. Specify (String 100))
4. No treatment prescribed

CHECK for 1, 2, 3 SELECTED WITH 4: "Yes, prescribed antiviral treatments," "Yes, prescribed monoclonal antibodies," or "Yes, prescribed another treatment" cannot be selected with "No treatment prescribed".

(HCOVID10. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] ([Respondent])

[Were you / Was [REFERENCE PERSON] / Was [SPOUSE-PARTNER]] [HCOVID20=1: ever] admitted to a hospital because of COVID-19?

1. Yes 5. No → GO TO HCOVID13

GO TO HCOVID11

(WEB) [Were you / Was [REFERENCE PERSON] / Was [SPOUSE-PARTNER]] [HCOVID20=1: ever] admitted to a hospital because of COVID-19?

1. Yes 5. No → GO TO HCOVID13

GO TO HCOVID11

HCOVID11. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] ([Respondent])

How many nights did [you / he / she] spend in the hospital because of COVID-19?

1 - 60

(WEB) How many nights did [you / he / she] spend in the hospital because of COVID-19?

1 - 60 Nights
**HCovid12. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]**

Did [you / he / she] require any of the following treatments?

- READ list
- ENTER all that apply

1. Oxygen (in the nose or using a facemask)
2. Intensive care or ICU monitoring
3. A breathing tube or ventilator
4. Other specify (DO NOT READ)
5. None of the above (DO NOT READ)

**GO TO HCOVID15**

**HCovid13. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]**

Did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] have any COVID-19 symptoms?

- If had COVID-19 more than once, PROBE: Please tell us about the worst experience

  1. Yes
  2. Not sure
  3. No

**GO TO HCOVID15**

**HCovid14. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]**

Overall, when these symptoms were at their worst, how bad or bothersome were they?

Would you say they were mild, moderate, severe or very severe?

1. Mild
2. Moderate
3. Severe
4. Very severe

**GO TO HCOVID15**

**HCovid15. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]**

Are [you / he / she] currently experiencing any lingering physical or mental health effects from COVID-19 [HCovid13=YES: or these symptoms]?

- If R says not sure if symptoms are due to COVID-19 or some other condition, ENTER [2]

1. Yes
2. Not sure
3. No

**GO TO HCOVID16**

**HCovid16. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]**

Are these physical health effects, mental health effects, or both?

*(WEB)* Are these physical health effects, mental health effects, or both?


**HCOVID17 RULE:** Whether Had Physical Effects, Mental Health Effects, or Both

<table>
<thead>
<tr>
<th>Physical (HCOVID16=1)</th>
<th>Mental (HCOVID16=2)</th>
<th>ALL OTHERS (HCOVID16=3, NA, DK, RF)</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO HCOVID17</td>
<td>GO TO HCOVID17A</td>
<td>GO TO HCOVID17</td>
</tr>
</tbody>
</table>

**HCOVID17. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

How bad or bothersome are the lingering physical effects from COVID-19 [HCOVID13=YES: or these symptoms]? Would you say they are mild, moderate, severe or very severe?


*(WEB)* How bad or bothersome are the lingering PHYSICAL effects from COVID-19 [HCOVID13=YES: or these symptoms]?


**HCOVID17A RULE:** Whether Had Physical and Mental Health Effects

<table>
<thead>
<tr>
<th>Physical and Mental Health Effects (HCOVID16=3, NA,DK,RF)</th>
<th>ALL OTHERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO HCOVID17A</td>
<td>GO TO H2</td>
</tr>
</tbody>
</table>

**HCOVID17A. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

How bad or bothersome are the lingering mental health effects from COVID-19 [HCOVID13=YES: or these symptoms]? Would you say they are mild, moderate, severe or very severe?


*(WEB)* How bad or bothersome are the lingering MENTAL health effects from COVID-19 [HCOVID13=YES: or these symptoms]?


**Chronic Conditions**

**H2. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

[Do you / Does [REFERENCE PERSON] / Does [SPOUSE-PARTNER]] have any physical or mental health condition that limits the type of work or the amount of work [you / he / she] can do?

1. Yes 5. No → GO TO H5A

GO TO H3

*(WEB)* [Do you / Does [REFERENCE PERSON] / Does [SPOUSE-PARTNER]] have any physical or mental health condition that limits the type of work or the amount of work [you / he / she] can do?

1. Yes 5. No → GO TO H5A

GO TO H3
H3. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

Does this condition keep [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] from doing some types of work?

1. Yes  
5. No  
7. Can do nothing (IF VOL) → GO TO H5A

(WEB) Does this condition keep [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] from doing SOME TYPES of work?

1. Yes  
5. No

H4. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

For work [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] can do, how much does it limit the amount of work [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] can do - a lot, somewhat, or just a little?

1. A lot  
3. Somewhat  
5. Just a little  
7. Not at all

(WEB) For work [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] can do, how much does it limit THE AMOUNT of work you / [REFERENCE PERSON] / [SPOUSE-PARTNER] can do?

1. A lot  
3. Somewhat  
5. Just a little  
7. Not at all

H5A. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

These next questions ask you about health conditions that a doctor or other health professional has EVER told [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] that [you have / he has / she has] or had in [your / his / her] lifetime.

Has a doctor or other health professional EVER told [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] that [you / he / she] had...

A stroke?

1. Yes  
5. No → GO TO H5B

GO TO H6A1

(WEB) These next questions are about health conditions that a doctor or other health professional has EVER told you / [REFERENCE PERSON] / [SPOUSE-PARTNER] that [you have / he has / she has] or had in [your / his / her] LIFETIME.

Has a doctor or other health professional EVER told [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] that [you / he / she] had a stroke?

1. Yes  
5. No → GO TO H5B

GO TO H6A1

H6A1. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

How old were you / was [REFERENCE PERSON] / was [SPOUSE-PARTNER] the first time [you / he / she] had a stroke?

1 – [CURRENT AGE] O 995. Less than one year old (SP_OC) (IF VOL)

(WEB) How old were you / was [REFERENCE PERSON] / was [SPOUSE-PARTNER] the first time [you / he / she] had a stroke?

1 – [CURRENT AGE]  
O 995. Less than one year old (SP_OC)

CHECK: Please enter an age from 1 to [CURRENT AGE].

H6A2. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

Have you / Has he / Has she had [RETURNING RP (SP) & (H6A1=995; or IWTYPE=REINT, SO & AGE minus H6A1>2; or REC, RECSO & AGE minus H6A1>4)]: another stroke since our last interview in
[P2YEAR] / [P4YEAR] / [(PYIWDATE)] / ALL OTHERS: a second or subsequent stroke since that first one?
1. Yes 5. No

(WEB) [Have you / Has he / Has she] had [RETURNING RP (SP) & (H6A1=995; or IWTYPE=REINT, SO & AGE minus H6A1>2; or REC, RECSO & AGE minus H6A1>4)]: another stroke since our last interview in [[P2YEAR] / [P4YEAR]] [[PYIWDATE]] / ALL OTHERS: a second or subsequent stroke since that first one?
1. Yes 5. No

H7A. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
How much does this condition limit [your / his / her] normal daily activities? A lot, somewhat, just a little, or not at all?

(WEB) How much does this condition limit [your / his / her] normal daily activities?

H7A. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
[Are you / Is [REFERENCE PERSON] / Is [SPOUSE-PARTNER]] now taking medication because of [your / his / her] stroke or its complications?
1. Yes 5. No

(WEB) [Are you / Is [REFERENCE PERSON] / Is [SPOUSE-PARTNER]] now taking medication because of [your / his / her] stroke or its complications?
1. Yes 5. No

H5B. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
(Has a doctor or other health professional EVER told [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] that [you / he / she] had...)
A heart attack?
1. Yes 5. No → GO TO H5C

GO TO H6B1

(WEB) Has a doctor or other health professional EVER told [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] that [you / he / she] had a heart attack?
1. Yes 5. No → GO TO H5C

GO TO H6B1

H6B1. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
How old [were you / was [REFERENCE PERSON] / was [SPOUSE-PARTNER]] the first time [you / he / she] had a heart attack?
1 – [CURRENT AGE] 0 995. Less than one year old (SP_0C) (IF VOL)

(WEB) How old [were you / was [REFERENCE PERSON] / was [SPOUSE-PARTNER]] the first time [you / he / she] had a heart attack?
1 – [CURRENT AGE] Age
0 995. Less than one year old (SP_0C)

CHECK: Please enter an age from 1 to [CURRENT AGE].

H6B2. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
[Have you / Has he / Has she] had [RETURNING RP (SP) & (H6A1=995; or IWTYPE=REINT, SO & AGE minus H6A1>2; or REC, RECSCO & AGE minus H6A1>4)]: another heart attack since our last interview in [[P2YEAR] / [P4YEAR]] [[PYIWDATE]] / ALL OTHERS: a second or subsequent heart attack since that first one?

1. Yes 5. No

(HWEB) [Have you / Has he / Has she] had [RETURNING RP (SP) & (H6A1=995; or IWTYPE=REINT, SO & AGE minus H6A1>2; or REC, RECSCO & AGE minus H6A1>4)]: another heart attack since our last interview in [[P2YEAR] / [P4YEAR]] [[PYIWDATE]] / ALL OTHERS: a second or subsequent heart attack since that first one?

1. Yes 5. No

H7B. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
How much does this condition limit [your / his / her] normal daily activities? A lot, somewhat, just a little, or not at all?


(WEB) How much does this condition limit [your / his / her] normal daily activities?


H7B2. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
Are you / Is [REFERENCE PERSON] / Is [SPOUSE-PARTNER] now taking or carrying medication because of [your / his / her] heart attack?

1. Yes 5. No

(WEB) Are you / Is [REFERENCE PERSON] / Is [SPOUSE-PARTNER] now taking or carrying medication because of [your / his / her] heart attack?

1. Yes 5. No

H5C. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
(Has a doctor or other health professional EVER told [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]) that [you / he / she] had …) Coronary heart disease, angina, or congestive heart failure?

1. Yes 5. No

GO TO H5D

GO TO H6C1

(WEB) Has a doctor or other health professional EVER told [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]) that [you / he / she] had coronary heart disease, angina, or congestive heart failure?

1. Yes 5. No

GO TO H6C1

H6C1. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
How old [were you / was [REFERENCE PERSON] / was [SPOUSE-PARTNER]] when [you were / he was / she was] first diagnosed with (this condition / any of these conditions)?

1 – [CURRENT AGE] 0 995. Less than one year old (SP_0C) (IF VOL)

(WEB) How old [were you / was [REFERENCE PERSON] / was [SPOUSE-PARTNER]] when [you were / he was / she was] first diagnosed with this condition or any of these conditions?

1 – [CURRENT AGE] Age

0 995. Less than one year old (SP_0C)

CHECK: Please enter an age from 1 to [CURRENT AGE].
H7C. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
How much does this condition limit [your / his / her] normal daily activities? A lot, somewhat, just a little, or not at all?


(WEB) How much does this condition limit [your / his / her] normal daily activities?


H7C2. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] 
[Are you / Is [REFERENCE PERSON] / Is [SPOUSE-PARTNER]] now taking or carrying medication for [your / his / her] coronary heart disease, angina or congestive heart failure?

1. Yes  5. No

(WEB) Are you / Is [REFERENCE PERSON] / Is [SPOUSE-PARTNER] now taking or carrying medication for [your / his / her] coronary heart disease, angina, or congestive heart failure?

1. Yes  5. No

H5D. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
(Has a doctor or other health professional EVER told [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] that [you / he / she] had …)
High blood pressure or hypertension?

1. Yes  5. No → GO TO H5E

GO TO H6D1

(WEB) Has a doctor or other health professional EVER told [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] that [you / he / she] had high blood pressure or hypertension?

1. Yes  5. No → GO TO H5E

GO TO H6D1

H6D1. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
How old [were you / was [REFERENCE PERSON] / was [SPOUSE-PARTNER]] when [you were / he was / she was] first diagnosed with high blood pressure or hypertension?

1 – [CURRENT AGE]  0 995. Less than one year old (SP_0C) (IF VOL)

(WEB) How old [were you / was [REFERENCE PERSON] / was [SPOUSE-PARTNER]] when [you were / he was / she was] first diagnosed with high blood pressure or hypertension?

1 – [CURRENT AGE]  0 995. Less than one year old (SP_0C)

CHECK: Please enter an age from 1 to [CURRENT AGE].

H7D. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
How much does this condition limit [your / his / her] normal daily activities? A lot, somewhat, just a little, or not at all?


(WEB) How much does this condition limit [your / his / her] normal daily activities?


H7D2. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
[Are you / Is [REFERENCE PERSON] / Is [SPOUSE-PARTNER]] now taking medication to lower [your / his / her] blood pressure?

1. Yes  5. No
Are you / Is [REFERENCE PERSON] / Is [SPOUSE-PARTNER] now taking medication to lower [your / his / her] blood pressure?

1. Yes 5. No

H5E. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
(Has a doctor or other health professional EVER told [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] that [you / he / she] had ...)

Asthma?

1. Yes 5. No → GO TO H5F

GO TO H6E1

H6E1. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
How old [were you / was [REFERENCE PERSON] / was [SPOUSE-PARTNER]] when [you were / he was / she was] first diagnosed with asthma?

1 – [CURRENT AGE] 0 995. Less than one year old (SP_0C) (IF VOL)

(Web) How old [were you / was [REFERENCE PERSON] / was [SPOUSE-PARTNER]] when [you were / he was / she was] first diagnosed with asthma?

1 – [CURRENT AGE] Age

0 995. Less than one year old (SP_0C)

CHECK: Please enter an age from 1 to [CURRENT AGE].

H7E. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
How much does this condition limit [your / his / her] normal daily activities? A lot, somewhat, just a little, or not at all?


(Web) How much does this condition limit [your / his / her] normal daily activities?


H7E2. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
In order to treat or control [your / his / her] asthma, [are you / is [REFERENCE PERSON] / is [SPOUSE-PARTNER]] now taking or carrying medication or an inhaler?

1. Yes 5. No

(Web) In order to treat or control [your / his / her] asthma, [are you / is [REFERENCE PERSON] / is [SPOUSE-PARTNER]] now taking or carrying medication or an inhaler?

1. Yes 5. No

H5F. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
(Has a doctor or other health professional EVER told [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] that [you / he / she] had ...)

Chronic lung disease such as bronchitis or emphysema?

1. Yes 5. No → GO TO H5G

GO TO H6F1
(WEB) Has a doctor or other health professional EVER told [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] that [you / he / she] had chronic lung disease such as bronchitis or emphysema?

1. Yes  5. No  → GO TO H5G

GO TO H6F1

H6F1. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

How old [were you / was [REFERENCE PERSON] / was [SPOUSE-PARTNER]] when [you were / he was / she was] first diagnosed with (lung disease / bronchitis / emphysema)?

1 – [CURRENT AGE]  0 995. Less than one year old (SP_0C) (IF VOL)

(WEB) How old [were you / was [REFERENCE PERSON] / was [SPOUSE-PARTNER]] when [you were / he was / she was] first diagnosed with lung disease, bronchitis, or emphysema?

1 – [CURRENT AGE]  

Age

0 995. Less than one year old (SP_0C)

CHECK: Please enter an age from 1 to [CURRENT AGE].

H7F. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

How much does this condition limit [your / his / her] normal daily activities? A lot, somewhat, just a little, or not at all?


(WEB) How much does this condition limit [your / his / her] normal daily activities?


H7F2. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

Are you / Is [REFERENCE PERSON] / Is [SPOUSE-PARTNER] now taking medication or receiving oxygen or other treatment for [your / his / her] lung condition?

1. Yes  5. No

(WEB) Are you / Is [REFERENCE PERSON] / Is [SPOUSE-PARTNER] now taking medication or receiving oxygen or other treatment for [your / his / her] lung condition?

1. Yes  5. No

H5G. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

Has a doctor or other health professional EVER told [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] that [you / he / she] had diabetes or high blood sugar?

1. Yes  5. No  → GO TO H5H

GO TO H6G1

(WEB) Has a doctor or other health professional EVER told [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] that [you / he / she] had diabetes or high blood sugar?

1. Yes  5. No  → GO TO H5H

GO TO H6G1

H6G1. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

How old [were you / was [REFERENCE PERSON] / was [SPOUSE-PARTNER]] when [you were / he was / she was] first diagnosed with diabetes or high blood sugar?

1 – [CURRENT AGE]  0 995. Less than one year old (SP_0C) (IF VOL)
(WEB) How old were you / was [REFERENCE PERSON] / was [SPOUSE-PARTNER] when [you were / he was / she was] first diagnosed with diabetes or high blood sugar?

<table>
<thead>
<tr>
<th></th>
<th></th>
<th>Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 – [CURRENT AGE]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>0995. Less than one year old (SP_OC)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

CHECK: Please enter an age from 1 to [CURRENT AGE].

H7G. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
How much does this condition limit [your / his / her] normal daily activities? A lot, somewhat, just a little, or not at all?

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. A lot</td>
<td>3. Somewhat</td>
<td>5. Just a little</td>
</tr>
</tbody>
</table>

7. Not at all

(WEB) How much does this condition limit [your / his / her] normal daily activities?

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. A lot</td>
<td>3. Somewhat</td>
<td>5. Just a little</td>
</tr>
</tbody>
</table>

7. Not at all

H7G2. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
In order to treat or control [your / his / her] diabetes, [are you / is [REFERENCE PERSON] / is [SPOUSE-PARTNER]] now taking medication that [you swallow / he swallows / she swallows] or using insulin shots or a pump?

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Yes</td>
<td>5. No</td>
</tr>
</tbody>
</table>

(WEB) In order to treat or control [your / his / her] diabetes, [are you / is [REFERENCE PERSON] / is [SPOUSE-PARTNER]] now taking medication that [you swallow / he swallows / she swallows] or using insulin shots or a pump?

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Yes</td>
<td>5. No</td>
</tr>
</tbody>
</table>

H5H. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
(Has a doctor or other health professional EVER told [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] that [you / he / she] had …)
Arthritis or rheumatism?

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Yes</td>
<td>5. No</td>
</tr>
</tbody>
</table>

GO TO H5I

GO TO H6H1

(WEB) Has a doctor or other health professional EVER told [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] that [you / he / she] had arthritis or rheumatism?

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Yes</td>
<td>5. No</td>
</tr>
</tbody>
</table>

GO TO H5I

GO TO H6H1

H6H1. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
How old were you / was [REFERENCE PERSON] / was [SPOUSE-PARTNER] when [you were / he was / she was] first diagnosed with arthritis / rheumatism?

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1 – [CURRENT AGE]</td>
<td></td>
<td>Age</td>
</tr>
<tr>
<td>0995. Less than one year old (SP_OC)</td>
<td></td>
<td>IF VOL</td>
</tr>
</tbody>
</table>

(WEB) How old were you / was [REFERENCE PERSON] / was [SPOUSE-PARTNER] when [you were / he was / she was] first diagnosed with arthritis / rheumatism?

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1 – [CURRENT AGE]</td>
<td></td>
<td>Age</td>
</tr>
<tr>
<td>0995. Less than one year old (SP_OC)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

CHECK: Please enter an age from 1 to [CURRENT AGE].

H7H. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
How much does this condition limit [your / his / her] normal daily activities? A lot, somewhat, just a little, or not at all?
H7H2. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

[Are you / Is [REFERENCE PERSON] / Is [SPOUSE-PARTNER]] now taking medication or receiving treatment for [your / his / her] arthritis or rheumatism?

1. Yes 5. No

(WEB) Are you / Is [REFERENCE PERSON] / Is [SPOUSE-PARTNER] now taking medication or receiving treatment for [your / his / her] arthritis or rheumatism?

1. Yes 5. No

H5I. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

(Has a doctor or other health professional EVER told [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] that [you / he / she] had permanent loss of memory or loss of mental ability?)

1. Yes 5. No → GO TO H5J

GO TO H6I1

(WEB) Has a doctor or other health professional EVER told [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] that [you / he / she] had permanent loss of memory or loss of mental ability?

1. Yes 5. No → GO TO H5J

GO TO H6I1

H6I1. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

How old [were you / was [REFERENCE PERSON] / was [SPOUSE-PARTNER]] when [you were / he was / she was] first diagnosed with (loss of memory / mental ability)?

1 – [CURRENT AGE] 0 995. Less than one year old (SP_0C) (IF VOL)

(WEB) How old [were you / was [REFERENCE PERSON] / was [SPOUSE-PARTNER]] when [you were / he was / she was] first diagnosed with loss of memory or mental ability?

1 – [CURRENT AGE] Age

0 995. Less than one year old (SP_0C)

CHECK: Please enter an age from 1 to [CURRENT AGE].

H7I. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

How much does this condition limit [your / his / her] normal daily activities? A lot, somewhat, just a little, or not at all?


(WEB) How much does this condition limit [your / his / her] normal daily activities?


H7I2. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

[Are you / Is [REFERENCE PERSON] / Is [SPOUSE-PARTNER]] now taking medication prescribed by a doctor to help with [your / his / her] memory problem?

1. Yes 5. No

H5J. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

(Has a doctor or other health professional EVER told [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] that [you / he / she] had…)
A learning disorder?

1. Yes 5. No → GO TO H5K

GO TO H6J1

*(WEB)* Has a doctor or other health professional EVER told [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] that [you / he / she] had a learning disorder?

1. Yes 5. No → GO TO H5K

GO TO H6J1

H6J1. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

How old [were you / was [REFERENCE PERSON] / was [SPOUSE-PARTNER]] when [you were / he was / she was] first diagnosed with a learning disorder?

1 – [CURRENT AGE] \(0\) 995. Less than one year old (SP_0C) *(IF VOL)*

*(WEB)* How old [were you / was [REFERENCE PERSON] / was [SPOUSE-PARTNER]] when [you were / he was / she was] first diagnosed with a learning disorder?

1 – [CURRENT AGE] \(0\) 995. Less than one year old (SP_0C)

CHECK: Please enter an age from 1 to [CURRENT AGE].

H7J. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

How much does this condition limit [your / his / her] normal daily activities? A lot, somewhat, just a little, or not at all?


*(WEB)* How much does this condition limit [your / his / her] normal daily activities?


H7J2. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

[Are you / Is [REFERENCE PERSON] / Is [SPOUSE-PARTNER]] now receiving treatment or taking medication to help with [your / his / her] learning disorder?

1. Yes 5. No

*(WEB)* Are you / Is [REFERENCE PERSON] / Is [SPOUSE-PARTNER] now receiving treatment or taking medication to help with [your / his / her] learning disorder?

1. Yes 5. No

H5K. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

(Has a doctor or other health professional EVER told [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] that [you / he / she] had …)
Cancer or a malignant tumor?

1. Yes 5. No → GO TO H5L

GO TO H6K1

*(WEB)* Has a doctor or other health professional EVER told [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] that [you / he / she] had cancer or a malignant tumor?

1. Yes 5. No → GO TO H5L
GO TO H6K1

H6K1. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

How old were you / was [REFERENCE PERSON] / was [SPOUSE-PARTNER] when you were / he was / she was first diagnosed with cancer?

1 – [CURRENT AGE]  
0 995. Less than one year old (SP_0C) *(IF VOL)*

*(WEB)* How old were you / was [REFERENCE PERSON] / was [SPOUSE-PARTNER] when you were / he was / she was first diagnosed with cancer?

1 – [CURRENT AGE]  
0 995. Less than one year old (SP_0C)

*CHECK:* Please enter an age from 1 to [CURRENT AGE].

H6K3. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

Are you / Is [REFERENCE PERSON] / Is [SPOUSE-PARTNER] currently in treatment for your / his / her cancer, in remission, or has it been cured?

- If R says can't afford insurance to get treatment, are doing nothing, etc, ENTER: [4]


*(WEB)* What is the current state of your / his / her cancer and its treatment?

1. Currently in treatment for cancer 2. Currently in remission 3. Cancer has been cured 4. Not currently in treatment

H6K4. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

What type of cancer do you / does he / does she have? (In what part of your / his / her body is it?)

- ENTER all that apply
- PROBE: Any others?


*(WEB)* What type of cancer do you / does he / does she have? In what part of your / his / her body is it? Please select all that apply.


H7K. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

How much does this condition limit your / his / her normal daily activities? A lot, somewhat, just a little, or not at all?


*(WEB)* How much does this condition limit your / his / her normal daily activities?


H5L. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
(Has a doctor or other health professional EVER told [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] that [you / he / she] had ...) Any emotional, mental health, or psychiatric conditions?

1. Yes  5. No  → GO TO H5M

GO TO H6L1

(111) (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

How old [were you / was [REFERENCE PERSON] / was [SPOUSE-PARTNER]] when [you were / he was / she was] first diagnosed?

1 – [CURRENT AGE]  0 995. Less than one year old (SP_0C) (IF VOL)

(117) (WEB) How old [were you / was [REFERENCE PERSON] / was [SPOUSE-PARTNER]] when [you were / he was / she was] first diagnosed?

1 – [CURRENT AGE]  Age

0 995. Less than one year old (SP_0C)

CHECK: Please enter an age from 1 to [CURRENT AGE].

H6L2. (111) (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

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. OCD (Obsessive Compulsive Disorder)
9. PTSD (Post-Traumatic Stress Disorder)
10. ADHD or ADD (Attention Deficit/Hyperactivity Disorder or Attention Deficit Disorder)
11. ODD (Oppositional Defiant Disorder or Conduct Disorder)
12. Autism, Asperger’s Disorder, Pervasive Developmental Disorder, or other autism spectrum disorder
97. Other -specify (H6L2SPEC. Specify (String 100))

(117) (WEB) What was the diagnosis? What is the emotional or psychiatric disorder? Please select all that apply.

1. Depression
2. Bipolar disorder or mania
3. Schizophrenia or psychosis
4. Anxiety or panic disorder
5. Phobias
6. Alcohol abuse or alcoholism
7. Drug abuse or drug addiction
8. OCD (Obsessive Compulsive Disorder)
9. PTSD (Post-Traumatic Stress Disorder)
10. ADHD or ADD (Attention Deficit/Hyperactivity Disorder or Attention Deficit Disorder)
11. ODD (Oppositional Defiant Disorder or Conduct Disorder)
12. Autism, Asperger’s Disorder, Pervasive Developmental Disorder, or other autism spectrum disorder
97. Other - Please specify: (H6L2SPEC)
H7L. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
How much does this condition limit [your / his / her] normal daily activities? A lot, somewhat, just a little, or not at all?

(Web) How much does this condition limit [your / his / her] normal daily activities?

H7L2. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
Are you / Is [REFERENCE PERSON] / Is [SPOUSE-PARTNER] receiving treatment or taking medication for [this condition / these conditions]?
1. Yes  5. No

(Web) Are you / Is [REFERENCE PERSON] / Is [SPOUSE-PARTNER] receiving treatment or taking medication for [this condition / these conditions]?
1. Yes  5. No

H5M. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
Is there any other serious, chronic condition that a doctor or other health professional EVER told [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] that [you / he / she] had?
1. Yes  5. No  → GO TO H5NCKPT

GO TO H6M1

(Web) Is there any other serious, chronic condition that a doctor or other health professional EVER told [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] that [you / he / she] had?
1. Yes  5. No  → GO TO H5NCKPT

GO TO H6M1

H6M1. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
What is that condition?
String 500

(Web) What is that condition?
String 500

H6M2. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
How old [were you / was [REFERENCE PERSON] / was [SPOUSE-PARTNER]] when [you were / he was / she was] first diagnosed?
1 – [CURRENT AGE]  0 995. Less than one year old (SP_0C) (IF VOL

(Web) How old [were you / was [REFERENCE PERSON] / was [SPOUSE-PARTNER]] when [you were / he was / she was] first diagnosed?
1 – [CURRENT AGE]  Age
0 995. Less than one year old (SP_0C)

CHECK: Please enter an age from 1 to [CURRENT AGE].
H7M. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
How much does this condition limit [your / his / her] normal daily activities? A lot, somewhat, just a little, or not at all?

(Web) How much does this condition limit [your / his / her] normal daily activities?

H7M2. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
[Are you / Is [REFERENCE PERSON] / Is [SPOuse-PARTNER]] now taking medication for this condition?
1. Yes  5. No

(Web) [Are you / Is [REFERENCE PERSON] / Is [SPOuse-PARTNER]] now taking medication for this condition?
1. Yes  5. No

Dementia Screener
H5N2–H5N9: All rights reserved. Copyright 2008 by Washington University in St. Louis, Missouri.

H5NCKPT. CAI Checkpoint: Whether 65 Years Old or Older

1. Age 65 or Older [AGEIWDATE=65+]  5. Age Less Than 65 [AGEIWDATE<65, DK, RF, NA] → GO TO H8

H5N2. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
Next, we’d like to know about changes that [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] may have had in the last several years [THIS PERSON IS NOT R: because of a thinking or memory problem].
In the last several years, has there been a change in problems [you / he / she] may have with judgment, for example, problems making decisions, making bad financial decisions, or with thinking?
1. Yes, a change  5. No, no change

H5N3. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
In the last several years, has there been a change in...
The amount of interest [you / he / she] may have in hobbies or activities?
1. Yes, a change  5. No, no change

H5N4. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
(In the last several years, has there been a change in...)  
[Your / His / Her] repeating the same things over and over, such as questions, stories, or statements?
1. Yes, a change  5. No, no change

H5N5. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
(In the last several years, has there been a change in ...)  
The trouble [you / he / she] may have learning how to use a tool, appliance or gadget like a TV remote?
1. Yes, a change  5. No, no change
H5N6. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

(In the last several years, has there been a change in ...) 
[Your / His / Her] forgetting the correct month or year?

1. Yes, a change  
5. No, no change

H5N7. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

(In the last several years, has there been a change in ...) 
The trouble [you / he / she] may have handling complicated money matters, like balancing a checkbook or paying bills?

1. Yes, a change  
5. No, no change

H5N8. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

(In the last several years, has there been a change in ...) 
The trouble [you / he / she] may have remembering appointments?

1. Yes, a change  
5. No, no change

H5N9. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

(In the last several years, has there been a change in ...) 
Daily problems [you / he / she] may have with thinking and/or memory?

1. Yes, a change  
5. No, no change

H5N2-H5N9 GRID. *(WEB)* Next, we’d like to know about changes that [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] may have had in the last several years [THIS PERSON IS NOT R: BECAUSE OF A THINKING OR MEMORY PROBLEM]. In the last several years, please indicate whether has there been A CHANGE IN each of the following:

<table>
<thead>
<tr>
<th></th>
<th>1. Yes, there has been a change</th>
<th>5. No, no change</th>
</tr>
</thead>
<tbody>
<tr>
<td>H5N2. Problems [you / he / she] may have with judgment, for example, problems making decisions, making bad financial decisions, or with thinking.</td>
<td>o</td>
<td>o</td>
</tr>
<tr>
<td>H5N3. The amount of interest [you / he / she] may have in hobbies or activities.</td>
<td>o</td>
<td>o</td>
</tr>
<tr>
<td>H5N4. [Your / His / Her] repeating the same things over and over, such as questions, stories, or statements.</td>
<td>o</td>
<td>o</td>
</tr>
<tr>
<td>H5N5. The trouble [you / he / she] may have learning how to use a tool, appliance or gadget like a TV remote.</td>
<td>o</td>
<td>o</td>
</tr>
<tr>
<td>H5N6. [Your / His / Her] forgetting the correct month or year.</td>
<td>o</td>
<td>o</td>
</tr>
<tr>
<td>H5N7. The trouble [you / he / she] may have handling complicated money matters, like balancing a checkbook or paying bills.</td>
<td>o</td>
<td>o</td>
</tr>
<tr>
<td>H5N8. The trouble [you / he / she] may have remembering appointments.</td>
<td>o</td>
<td>o</td>
</tr>
<tr>
<td>H5N9. DAILY problems [you / he / she] may have with thinking and/or memory.</td>
<td>o</td>
<td>o</td>
</tr>
</tbody>
</table>

All rights reserved. Copyright 2008 by Washington University in St. Louis, Missouri.

Hospital Stays.

H8. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

[Were you / Was [REFERENCE PERSON] / Was [SPOUSE-PARTNER]] a patient in a hospital overnight or longer at any time during [PYEAR]?

1. Yes  
5. No  → GO TO H8A3
Were you / Was [REFERENCE PERSON] / Was [SPOUSE-PARTNER] a patient in a hospital overnight or longer at any time during [PYEAR]?

1. Yes 5. No → GO TO H8A3

GO TO H8A

H8A, H8A2. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

How many nights [were you / was [REFERENCE PERSON] / was [SPOUSE-PARTNER]] in a hospital altogether in [PYEAR]?

- ENTER amount here, then SELECT unit of time on next screen (Nights, Weeks)

1 – 365 DK/RF → GO TO H8A3

↓

The amount entered is: [H8A]

- SELECT the unit of time below

1. Nights 2. Weeks

WEB) How long [were you / was [REFERENCE PERSON] / was [SPOUSE-PARTNER]] in a hospital altogether in [PYEAR]?

1 – 365 o 1. Nights o 2. Weeks

CHECK: Please enter 1 to 365 nights, or 1 to 52 weeks.
SIGNAL: Please select a unit of time.

Lower Body Functionality

H8A3. (CATI) (H5 1986) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

[Do you / Does he / Does she] have any trouble either walking several blocks or climbing a few flights of stairs, because of [your / his / her] health?

1. Yes 5. No

WEB) [Do you / Does he / Does she] have any trouble either walking several blocks or climbing a few flights of stairs, because of [your / his / her] health?

1. Yes 5. No

H8A4. (CATI) (H6 1986) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

[Do you / Does he / Does she] have trouble bending, lifting, or stooping because of [your / his / her] health?

1. Yes 5. No

WEB) [Do you / Does he / Does she] have trouble bending, lifting, or stooping because of [your / his / her] health?

1. Yes 5. No

Activities of Daily Living (ADL)

H9A. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

The next questions are about [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] ability to do certain activities - by [yourself / himself / herself] and without special equipment.

Because of a health or physical problem, [do you / does he / does she] have any difficulty bathing or showering?

1. Yes 5. No → GO TO H9B

GO TO H10A1

WEB) The next questions are about [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] ability to do certain activities by [yourself / himself / herself] and without special equipment.
Because of a health or physical problem, [do you / does he / does she] have any difficulty bathing or showering?

1. Yes  5. No  → GO TO H9B

GO TO H10A1

H10A1. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
Does someone usually help [you / him / her] with that activity?

1. Yes  5. No

(Web) Does someone usually help [you / him / her] with that activity?

1. Yes  5. No

H10A2. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
[Do you / Does he / Does she] usually use special equipment to do that activity?

1. Yes  5. No

(Web) [Do you / Does he / Does she] usually use special equipment to do that activity?

1. Yes  5. No

H9B. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
(Because of a health or physical problem, [do you / does he / does she] have any difficulty…)
Dressing?

1. Yes  5. No  → GO TO H9C

GO TO H10B1

(Web) Because of a health or physical problem, [do you / does he / does she] have any difficulty dressing?

1. Yes  5. No  → GO TO H9C

GO TO H10B1

H10B1. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
Does someone usually help [you / him / her] with that activity?

1. Yes  5. No

(Web) Does someone usually help [you / him / her] with that activity?

1. Yes  5. No

H10B2. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
[Do you / Does he / Does she] usually use special equipment to do that activity?

1. Yes  5. No

(Web) [Do you / Does he / Does she] usually use special equipment to do that activity?

1. Yes  5. No

H9C. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
(Because of a health or physical problem, [do you / does he / does she] have any difficulty…)
Eating?

1. Yes  5. No  → GO TO H9D

GO TO H10C1

(Web) Because of a health or physical problem, [do you / does he / does she] have any difficulty eating?

1. Yes  5. No  → GO TO H9D

GO TO H10C1
H10C1. \textit{(CATI)} \textbf{[CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]}
Does someone usually help [you / him / her] with that activity?
\begin{itemize}
  \item 1. Yes
  \item 5. No
\end{itemize}
\textit{(WEB)} Does someone usually help [you / him / her] with that activity?
\begin{itemize}
  \item 1. Yes
  \item 5. No
\end{itemize}

H10C2. \textit{(CATI)} \textbf{[CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]}
\textbf{[Do you / Does he / Does she] usually use special equipment to do that activity?}
\begin{itemize}
  \item 1. Yes
  \item 5. No
\end{itemize}
\textit{(WEB)} [Do you / Does he / Does she] usually use special equipment to do that activity?
\begin{itemize}
  \item 1. Yes
  \item 5. No
\end{itemize}

H9. \textit{(CATI)} \textbf{[CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]}
\textbf{(Because of a health or physical problem, [do you / does he / does she] have any difficulty...)}
Getting in or out of bed or a chair?
\begin{itemize}
  \item 1. Yes
  \item 5. No
\end{itemize}
\textit{GO TO H9E}
\textit{GO TO H10D1}

H9E. \textit{(CATI)} \textbf{[CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]}
\textit{Because of a health or physical problem, [do you / does he / does she] have any difficulty...)}
Walking?
\begin{itemize}
  \item 1. Yes
  \item 5. No
\end{itemize}
\textit{GO TO H9F}
\textit{GO TO H10E1}

H10D1. \textit{(CATI)} \textbf{[CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]}
Does someone usually help [you / him / her] with that activity?
\begin{itemize}
  \item 1. Yes
  \item 5. No
\end{itemize}
\textit{(WEB)} Does someone usually help [you / him / her] with that activity?
\begin{itemize}
  \item 1. Yes
  \item 5. No
\end{itemize}

H10D2. \textit{(CATI)} \textbf{[CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]}
\textbf{[Do you / Does he / Does she] usually use special equipment to do that activity?}
\begin{itemize}
  \item 1. Yes
  \item 5. No
\end{itemize}
\textit{(WEB)} [Do you / Does he / Does she] usually use special equipment to do that activity?
\begin{itemize}
  \item 1. Yes
  \item 5. No
\end{itemize}
H10E1. \textit{(CATI)} \[\text{CYNAMF} \ [\text{CYNAML}] : \text{[CYAQRTH]}, \text{[CYFUHU]}, \text{Age} \ [\text{AGEIWDATE}] \ [[\text{Respondent}]]\]
Does someone usually help [you / him / her] with that activity?

1. Yes 5. No

\textit{(WEB)} Does someone usually help [you / him / her] with that activity?

1. Yes 5. No

H10E2. \textit{(CATI)} \[\text{CYNAMF} \ [\text{CYNAML}] : \text{[CYAQRTH]}, \text{[CYFUHU]}, \text{Age} \ [\text{AGEIWDATE}] \ [[\text{Respondent}]]\]
[Do you / Does he / Does she] usually use special equipment to do that activity?

1. Yes 5. No

\textit{(WEB)} [Do you / Does he / Does she] usually use special equipment to do that activity?

1. Yes 5. No

H9F. \textit{(CATI)} \[\text{CYNAMF} \ [\text{CYNAML}] : \text{[CYAQRTH]}, \text{[CYFUHU]}, \text{Age} \ [\text{AGEIWDATE}] \ [[\text{Respondent}]]\]
(Because of a health or physical problem, [do you / does he / does she] have any difficulty...)

Getting outside?

1. Yes 5. No \rightarrow \text{GO TO H9G}

\text{GO TO H10F1}

\textit{(WEB)} Because of a health or physical problem, [do you / does he / does she] have any difficulty getting outside?

1. Yes 5. No \rightarrow \text{GO TO H9G}

\text{GO TO H10F1}

H10F1. \textit{(CATI)} \[\text{CYNAMF} \ [\text{CYNAML}] : \text{[CYAQRTH]}, \text{[CYFUHU]}, \text{Age} \ [\text{AGEIWDATE}] \ [[\text{Respondent}]]\]
Does someone usually help [you / him / her] with that activity?

1. Yes 5. No

\textit{(WEB)} Does someone usually help [you / him / her] with that activity?

1. Yes 5. No

H10F2. \textit{(CATI)} \[\text{CYNAMF} \ [\text{CYNAML}] : \text{[CYAQRTH]}, \text{[CYFUHU]}, \text{Age} \ [\text{AGEIWDATE}] \ [[\text{Respondent}]]\]
[Do you / Does he / Does she] usually use special equipment to do that activity?

1. Yes 5. No

\textit{(WEB)} [Do you / Does he / Does she] usually use special equipment to do that activity?

1. Yes 5. No

H9G. \textit{(CATI)} \[\text{CYNAMF} \ [\text{CYNAML}] : \text{[CYAQRTH]}, \text{[CYFUHU]}, \text{Age} \ [\text{AGEIWDATE}] \ [[\text{Respondent}]]\]
(Because of a health or physical problem, [do you / does he / does she] have any difficulty...)

Using the toilet, including getting to the toilet?

1. Yes 5. No \rightarrow \text{GO TO H11A}

\text{GO TO H10G1}

\textit{(WEB)} Because of a health or physical problem, [do you / does he / does she] have any difficulty using the toilet, including getting to the toilet?

1. Yes 5. No \rightarrow \text{GO TO H11A}

\text{GO TO H10G1}
H10G1. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
Does someone usually help [you / him / her] with that activity?
   1. Yes  5. No
(WEB) Does someone usually help [you / him / her] with that activity?
   1. Yes  5. No

H10G2. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
[Do you / Does he / Does she] usually use special equipment to do that activity?
   1. Yes  5. No
(WEB) [Do you / Does he / Does she] usually use special equipment to do that activity?
   1. Yes  5. No

Instrumental Activities of Daily Living (IADL)

H11A. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
The next questions are about doing other activities by [yourself / himself / herself] and without special equipment.
Because of a health or physical problem, [do you / does [REFERENCE PERSON] / does [SPOUSE-PARTNER]] have any difficulty preparing [your / his / her] own meals?
   1. Yes  5. No  DK/RF  7. Does not do
GO TO H11C  GO TO H11B
(WEB) The next questions are about whether [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] can do other activities by [yourself / himself / herself] and without special equipment.
Because of a health or physical problem, [do you / does [REFERENCE PERSON] / does [SPOUSE-PARTNER]] have any difficulty preparing [your / his / her] own meals?
   1. Yes  5. No  NA  7. Does not prepare own meals
GO TO H11C  GO TO H11B

H11B. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
Is this because of a health or physical problem?
   1. Yes  5. No
(WEB) Is this because of a health or physical problem?
   1. Yes  5. No

H11C. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
(Do you / Does [REFERENCE PERSON] / Does [SPOUSE-PARTNER]] have any difficulty...)
Shopping for personal items or medicines?
   1. Yes  5. No  DK/RF  7. Does not do
GO TO H11E  GO TO H11D
(WEB) [Do you / Does [REFERENCE PERSON] / Does [SPOUSE-PARTNER]] have any difficulty shopping for personal items or medicines?
   1. Yes  5. No  NA  7. Does not shop for personal items or medicines
GO TO H11E  GO TO H11D
H11D. *(CATI)* \[CYNAMF\] \[CYNAML\]: \[CYAQRTH\], \[CYFUHU\], Age [AGEIWDATE] [[Respondent]]

Is this because of a health or physical problem?

1. Yes  5. No

*(WEB)* Is this because of a health or physical problem?

1. Yes  5. No

H11E. *(CATI)* \[CYNAMF\] \[CYNAML\]: \[CYAQRTH\], \[CYFUHU\], Age [AGEIWDATE] [[Respondent]]

([Do you / Does [REFERENCE PERSON] / Does [SPOUSE-PARTNER]] have any difficulty...)

Managing your / his / her own money, such as keeping track of expenses or paying bills?

1. Yes  5. No  DK/RF  7. Does not do

GO TO H11G  GO TO H11F

*(WEB)* [Do you / Does [REFERENCE PERSON] / Does [SPOUSE-PARTNER]] have any difficulty managing your / his / her own money, such as keeping track of expenses or paying bills?

1. Yes  5. No  NA  7. Does not manage own money

GO TO H11G  GO TO H11F

H11F. *(CATI)* \[CYNAMF\] \[CYNAML\]: \[CYAQRTH\], \[CYFUHU\], Age [AGEIWDATE] [[Respondent]]

Is this because of a health or physical problem?

1. Yes  5. No

*(WEB)* Is this because of a health or physical problem?

1. Yes  5. No

H11G. *(CATI)* \[CYNAMF\] \[CYNAML\]: \[CYAQRTH\], \[CYFUHU\], Age [AGEIWDATE] [[Respondent]]

([Do you / Does [REFERENCE PERSON] / Does [SPOUSE-PARTNER]] have any difficulty...)

Using the telephone?

1. Yes  5. No  DK/RF  7. Does not do

GO TO H11J  GO TO H11H

*(WEB)* [Do you / Does [REFERENCE PERSON] / Does [SPOUSE-PARTNER]] have any difficulty using the telephone?

1. Yes  5. No  NA  7. Does not use the telephone

GO TO H11J  GO TO H11H

H11H. *(CATI)* \[CYNAMF\] \[CYNAML\]: \[CYAQRTH\], \[CYFUHU\], Age [AGEIWDATE] [[Respondent]]

Is this because of a health or physical problem?

1. Yes  5. No

*(WEB)* Is this because of a health or physical problem?

1. Yes  5. No
H11J. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

([Do you / Does [REFERENCE PERSON] / Does [SPOUSE-PARTNER]] have any difficulty...)
Doing heavy housework, like scrubbing floors or washing windows?

1. Yes  5. No  DK/RF  7. Does not do

GO TO H11L  GO TO H11K

(WEB) [Do you / Does [REFERENCE PERSON] / Does [SPOUSE-PARTNER]] have any difficulty doing HEAVY housework, like scrubbing floors or washing windows?

1. Yes  5. No  NA  7. Does not do HEAVY housework

GO TO H11L  GO TO H11K

H11K. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

Is this because of a health or physical problem?

1. Yes  5. No

(WEB) Is this because of a health or physical problem?

1. Yes  5. No

H11L. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

([Do you / Does [REFERENCE PERSON] / Does [SPOUSE-PARTNER]] have any difficulty...)
Doing light housework, like doing dishes, straightening up, or light housecleaning?

1. Yes  5. No  DK/RF  7. Does not do

GO TO H12A  GO TO H11M

(WEB) [Do you / Does [REFERENCE PERSON] / Does [SPOUSE-PARTNER]] have any difficulty doing LIGHT housework, like doing dishes, straightening up, or light housecleaning?

1. Yes  5. No  NA  7. Does not do LIGHT housework

GO TO H12A  GO TO H11M

H11M. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

Is this because of a health or physical problem?

1. Yes  5. No

(WEB) Is this because of a health or physical problem?

1. Yes  5. No
Leisure & Exercise

H12A, H12APER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

The next questions are about physical activities (exercise, sports, physically active hobbies...) that [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] may do in [your / his / her] leisure time.

(In [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] leisure time,) how often [do you / does [REFERENCE PERSON] / [SPOUSE-PARTNER]] 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 (Week, Month, Year)
- If R says never, ENTER [0]
- If R says every day, ENTER [7] here and ENTER [WEEK] on the next screen
- If R reports hours or minutes per week/month/year, PROBE: We are looking for the number of times per week, month, or year

0 → GO TO H12B 1 – 997 DK/RF → GO TO H12B

The amount entered is: [H12A] times per ____
- SELECT the unit of time below
- If R says every day, ENTER [7] on the previous screen and ENTER [WEEK] here

3. Week 5. Month 6. Year 7. Other specify (H12APER SPEC. Specify. (String 100))

WEB) The next questions are about physical activities - exercise, sports, physically active hobbies - that [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] may do in [your / his / her] leisure time.

In [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] leisure time, how often [do you / does [REFERENCE PERSON] / [SPOUSE-PARTNER]] do VIGOROUS activities for at least 10 minutes that cause heavy sweating or large increases in breathing or heart rate?

0 – 997 Times per 3. Week 5. Month 6. Year

CHECK: Please enter a number from 0 to 997.

7. Other - Please specify: (H12APER SPEC)

SIGNAL: Please select a unit of time.

H12B, H12BPER. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

How often [do you / does [REFERENCE PERSON] / does [SPOUSE-PARTNER]] 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 (Week, Month, Year)
- If R says never, ENTER [0]
- If R says every day, ENTER [7] here and ENTER [WEEK] on the next screen
- If R reports hours or minutes per week/month/year, PROBE: We are looking for the number of times per week, month, or year

0 → GO TO H12C 1 – 997 DK/RF → GO TO H12C

The amount entered is: [H12B] times per ____
- SELECT the unit of time below
- If R says every day, ENTER [7] on the previous screen and ENTER [WEEK] here

3. Week 5. Month 6. Year 7. Other specify (H12BPER SPEC. Specify. (String 100))

WEB) In [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] leisure time, how often [do you / does [REFERENCE PERSON] / [SPOUSE-PARTNER]] do LIGHT OR MODERATE activities for at least 10 minutes that cause only light sweating or slight to moderate increases in breathing or heart rate?

0 – 997 Times per 3. Week 5. Month 6. Year

CHECK: Please enter a number from 0 to 997.

7. Other - Please specify: (H12BPER SPEC)

SIGNAL: Please select a unit of time.
H12C. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

(In [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s leisure time,...)

(How often [do you / does [REFERENCE PERSON] / does [SPOUSE-PARTNER]] 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 (Week, Month, Year)
- If R says never, ENTER [0]
- If R says every day, ENTER [7] here and ENTER [WEEK] on the next screen
- If R reports hours or minutes per week/month/year, PROBE: We are looking for the number of times per week, month, or year

0 → GO TO H13 1 – 997 DK/RF → GO TO H13

The amount entered is: [H12C] times per ____

- SELECT the unit of time below
- If R says every day, ENTER [7] on the previous screen and ENTER [WEEK] here

WEB In [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] leisure time, how often [do you / does [REFERENCE PERSON] / does [SPOUSE-PARTNER]] do physical activities specifically designed to strengthen [your / his / her] muscles such as lifting weights?

0 – 997 Times per 3. Week 5. Month 6. Year

CHECK: Please enter a number from 0 to 997.

SIGNAL: Please select a unit of time.

Smoking

H13. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

[Do you / Does [REFERENCE PERSON] / Does [SPOUSE-PARTNER]] smoke cigarettes?

- IF R asks about vaping or e-cigarettes, PROBE: We will ask about vaping next

1. Yes 5. No → GO TO H16CKPT

GO TO H14

WEB) [Do you / Does [REFERENCE PERSON] / Does [SPOUSE-PARTNER]] smoke cigarettes?

1. Yes 5. No → GO TO H16CKPT

GO TO H14

H14. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

On average, how many cigarettes per day [do you / does he / does she] usually smoke?

- DEFINITION: A standard pack of cigarettes contains 20 cigarettes
- For one cigarette or less per day, ENTER [1]

1 – 997

WEB) On average, how many cigarettes per day [do you / does he / does she] usually smoke?

A standard pack of cigarettes contains 20 cigarettes.
For less than one cigarette per day, please ENTER “1”

1 – 997 Cigarettes

CHECK: Please enter a number from 1 to 997.
H15CKPT. CAI Checkpoint: Whether Eligible for Dependent Interviewing

1. Ineligible: Different RP (SP); or Not a Reinterview
   (a. REINT But Not Same RP (SP);
    b. Not REINT)

3. Ineligible: Non-Smoker Last Wave & Preloaded H15 Not Valid
   (REINT & NEWPRELOAD.H13 <>Yes)
   (Assign H15=NEWPRELOAD)
   GO TO H19ACKPT

4. Ineligible: Smoker Last Wave & Preloaded H15 Not Valid
   (REINT & NEWPRELOAD.H13 =Yes & NEWPRELOAD.H15 <>Response)

5. Eligible: Smoker Last Wave & Preloaded H15 Valid
   (REINT & NEWPRELOAD.H13=Yes & NEWPRELOAD.H15=Response)
   (Assign H15=NEWPRELOAD)
   GO TO H19ACKPT

H15. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
How old [were you / was [REFERENCE PERSON] / was [SPOUSE-PARTNER]] when [you / he / she] first smoked cigarettes regularly?

1 – [CURRENT AGE]
GO TO H19ACKPT

(WEB) How old [were you / was [REFERENCE PERSON] / was [SPOUSE-PARTNER]] when [you / he / she] first smoked cigarettes regularly?

1 – [CURRENT AGE] Age
GO TO H19ACKPT

CHECK: Please enter an age 1 to [CURRENT AGE].

H16CKPT. CAI Checkpoint: Whether Eligible for Dependent Interviewing

1. Ineligible: Different RP (SP); or Not a Reinterview
   (a. REINT But Not Same RP (SP);
    b. Not REINT)

3. Eligible: Non-Smoker Last Wave & Preloaded H16 Valid
   (REINT & NEWPRELOAD.H16=Response)
   (Assign H16-H19=NEWPRELOAD)
   GO TO H19ACKPT

4. Ineligible: Smoker Last Wave & Preloaded H16 Not Valid
   (REINT & NEWPRELOAD.H16=Yes & NEWPRELOAD.H16=Response)

5. Ineligible: Smoker Last Wave
   (REINT & NEWPRELOAD.H13=Yes)

H16. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
Did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] ever smoke cigarettes?
• IF R asks about vaping or e-cigarettes, PROBE: We will ask about vaping next

1. Yes 5. No   → GO TO H19ACKPT

GO TO H17

(WEB) Did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] ever smoke cigarettes?
Do not include vaping or e-cigarettes; we will ask about that next.

1. Yes 5. No   → GO TO H19ACKPT

GO TO H17
H17. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
On average, how many cigarettes per day did [you / he / she] smoke?
- DEFINITION: A standard pack of cigarettes contains 20 cigarettes
- For one cigarette or less per day, ENTER [1]

1 – 997

(WEB) On average, how many cigarettes per day did [you / he / she] smoke?
A standard pack of cigarettes contains 20 cigarettes.
For less than one cigarette per day, please ENTER “1”

1 – 997 Cigarettes
CHECK: Please enter a number from 1 to 997.

H18. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
How old [were you / was [REFERENCE PERSON] / was [SPOUSE-PARTNER]] when [you / he / she] last smoked cigarettes regularly?

1 – [CURRENT AGE]

(WEB) How old [were you / was [REFERENCE PERSON] / was [SPOUSE-PARTNER]] when [you / he / she] last smoked cigarettes regularly?
1 – [CURRENT AGE] Age
CHECK: Please enter an age 1 to [CURRENT AGE].

H19. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
How old [were you / was [REFERENCE PERSON] / was [SPOUSE-PARTNER]] when [you / he / she] first smoked cigarettes regularly?

1 – [CURRENT AGE (H18)]

(WEB) How old [were you / was [REFERENCE PERSON] / was [SPOUSE-PARTNER]] when [you / he / she] first smoked cigarettes regularly?
1 – [CURRENT AGE] Age
CHECK: Please enter an age 1 to [H18] / [CURRENT AGE].

Vaping
2023 forward: Dependent Interviewing for Reinterviews
H19ACKPT. CAI Checkpoint: Whether Eligible for Dependent Interviewing

1. Ineligible: Different RP (SP); or Not a Reinterview (a. REINT But Not Same RP (SP); b. Not REINT)
3. Ineligible: Preloaded H19A No, Non-Response, or Not Asked (REINT & NEWPRELOAD.H19A =5, DK,RF,NA)
Assign H19A, H19B= NEWPRELOAD.H19A, H19B; THEN GO TO H19C

H19A. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
Do you / Does [REFERENCE PERSON] / Does [SPOUSE-PARTNER] ever vape? This includes vaping nicotine, marijuana, and/or flavoring. (To “vape” is to use a device such as a vape-pen, an e-cigarette, an e-hookah, or e-vaporizer to inhale a mist into the lungs.)

1. Yes  5. No → GO TO H20
Go to H19B

[WEB] Do you / Does [REFERENCE PERSON] / Does [SPOUSE-PARTNER] ever vape? This includes vaping nicotine, marijuana, and/or flavoring. To "vape" is to use a device such as a vape-pen, an e-cigarette, an e-hookah, or e-vaporizer to inhale a mist into the lungs.

1. Yes 5. No → GO TO H20

Go to H19B

H19B. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

How old [were you / was [REFERENCE PERSON] / was [SPOUSE-PARTNER]] when [you / he / she] first vaped regularly?

1 – [CURRENT AGE] 0.997. Never vaped regularly (VOL) (SP_0A)

[WEB] How old [were you / was [REFERENCE PERSON] / was [SPOUSE-PARTNER]] when [you / he / she] first vaped regularly?

1 – [CURRENT AGE] Age

0.997. Never vaped regularly (SP_0A)

CHECK: Please enter an age 1 to [CURRENT AGE].

H19C. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

During the past 30 days, on how many days [have you / has he / has she] vaped?

0 – 30

[WEB] During the past 30 days, on how many days [have you / has he / has she] vaped?

0 – 30 Days

CHECK: Please enter a number from 0 to 30.

Alcohol Use

H20. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

[Do you / Does [REFERENCE PERSON] / Does [SPOUSE-PARTNER]] drink any alcoholic beverages such as beer, wine, or liquor?

1. Yes 5. No → GO TO H20A

Go to H21A

[WEB] [Do you / Does [REFERENCE PERSON] / Does [SPOUSE-PARTNER]] drink any alcoholic beverages, such as beer, wine, or liquor?

1. Yes 5. No → GO TO H20A

Go to H21A

H20A. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

[Have you / Has [REFERENCE PERSON] / Has [SPOUSE-PARTNER]] ever had a drink of any alcoholic beverages such as beer, wine, or liquor?

1. Yes 5. No → GO TO H22

[WEB] [Have you / Has [REFERENCE PERSON] / Has [SPOUSE-PARTNER]] ever had a drink of any alcoholic beverages such as beer, wine, or liquor?
1. Yes  5. No  → GO TO H22

H21A. (*CATI*) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

In the last year, on average, how often did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] 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

GO TO H21B

(WEB) In the last year, on average, how often did [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]] have any alcohol to drink?

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  NA  → GO TO H22

GO TO H21B

H21B. (*CATI*) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

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 – 97

(WEB) In the last year, on the days [you / he / she] drank, about how many drinks did [you / he / she] have?

If [you / he / she] did not drink in the last year, please enter “0”.

0 – 97 Drinks

CHECK: Please enter a number from 0 to 97.

H21C. (*CATI*) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

In the last year, on how many days [have you / has he / has she] had [MALE: five / FEMALE: four] or more drinks on one occasion?

• ENTER [0] for None

0 – 365

(WEB) In the last year, on how many days [have you / has he / has she] had [MALE: five / FEMALE: four] or more drinks on one occasion?

If [you / he / she] did not drink in the last year, please enter “0”.

0 – 365 Days

CHECK: Please enter a number from 0 to 365.
Weight & Height

H22, H22Kilo. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
About how much [do you / does [REFERENCE PERSON] / does [SPOUSE-PARTNER]] weigh?
- ENTER weight in pounds or PRESS [Enter] to continue to next screen for kilograms
- If more than 997 pounds, ENTER [997]

[ENTER] 50 – 997 Pounds DK/RF
↓ GO TO H23FT

(About how much [do you / does [REFERENCE PERSON] / does [SPOUSE-PARTNER]] weigh?)
- ENTER weight in kilograms
- If more than 453.2 kilograms, ENTER [453.2]

36.0 – 453.2

(WEB) Please enter [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] weight.
Default
To enter metric units instead, click here.
Alternate
To enter standard units instead, click here.
Weight
50 – 997 Pounds

H23FT, H23IN, H23Meter. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
How tall [are you / is [REFERENCE PERSON] / is [SPOUSE-PARTNER]]?
- ENTER height in feet and inches or PRESS [Enter] to continue to next screen for meters

[ENTER] 0 – 7 Feet DK/RF → GO TO H24CKPT

(How tall [are you / is [REFERENCE PERSON] / is [SPOUSE-PARTNER]]?)
- ENTER height in meters

0.60 – 3.03

(WEB) Please enter [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] height.
Default
To enter metric units instead, click here.
Alternate
To enter standard units instead, click here.
Height
0 – 7 Feet
0 – 11 Inches

0.60 – 3.03 Meters

End H1_H23

H24CKPT. CAI Checkpoint: Whether Spouse-Partner in FU (CYAQRTH=201-222, CYFUHU=FU, FUMI)

1. Spouse-Partner → REPEAT H1 - H23; 5. No Spouse-Partner
Then GO TO H25CKPT ↓
### Section H.25_H45[1..2] [1]=Respondent (or RP if R=OFUM, Proxy), [2]=Respondent’s spouse-partner (or SP if R=OFUM, Proxy)

HEALTH AQSN. AQSN of Reference Person (Spouse-Partner). Assigned.

REPORT AQSN. AQSN of Respondent. Assigned.

#### H25_INTRO. (CATI ONLY) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

These next questions ask about [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] health during childhood, that is, before age 18. [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. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

Consider [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] health while [you were / he was/ she was] growing up, before [you were / he was/ she was] 18 years old. Would you say that [your / his / her] health during that time was excellent, very good, good, fair or poor?

1. Excellent
2. Very good
3. Good
4. Fair
5. Poor

(WEB) These next questions ask about [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] health during CHILDHOOD, that is, before age 18. [R=OFUM, PROXY: We understand that it may be difficult for you to answer these questions, but please do your best.]

Consider [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] health while [you were / he was/ she was] growing up, before [you were / he was/ she was] 18 years old. Would you say that [your / his / her] health during that time was...?

1. Excellent
2. Very good
3. Good
4. Fair
5. Poor

#### H26. (CATI) (H1D) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

When [you were / he was/ she was] growing up, before [you were / he was/ she was] 18 years old, did [you / he / she] miss a month or more of school because of a health problem?

1. Yes
5. No

(WEB) When [you were / he was/ she was] growing up, before [you were / he was/ she was] 18 years old, did [you / he / she] miss a month or more of school because of a health problem?

1. Yes
5. No

#### H27. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

Before [you were / he was/ she was] 18 years old, did [you / he / she] have any of the following childhood diseases:

Measles?

1. Yes
5. No
H28. (CATI) [CYAMF] [CYNAML] [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [Respondent]
(Before [you were / he was/ she was] 18 years old, did [you / he / she] have...)
Mumps?
1. Yes  5. No

H29. (CATI) [CYAMF] [CYNAML] [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [Respondent]
(Before [you were / he was/ she was] 18 years old, did [you / he / she] have...)
Chicken pox?
1. Yes  5. No

H30. (CATI) [CYAMF] [CYNAML] [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [Respondent]
(Before [you were / he was/ she was] 18 years old, did [you / he / she] have...)
Difficulty seeing, even with eye glasses or prescription lenses?
1. Yes  5. No

H27-H30 GRID. (WEB) Before [you were / he was/ she was] 18 years old, did [you / he / she] have any of the following childhood diseases:

<table>
<thead>
<tr>
<th></th>
<th>H27. Measles</th>
<th>H28. Mumps</th>
<th>H29. Chicken pox</th>
<th>H30. Difficulty seeing, even with eye glasses or prescription lenses</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Yes</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>5. No</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>5</td>
</tr>
</tbody>
</table>

H31. (CATI) [CYAMF] [CYNAML] [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [Respondent]
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

(WEB) Did one or both of [your / his / her] parents or guardians smoke during [your / his / her] childhood?
1. Yes, one parent/guardian  2. Yes, both parents/guardians  5. No, neither parent/guardian

H34. (CATI) [CYAMF] [CYNAML] [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [Respondent]
(Before [you were / he was/ she was] 18 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. (CATI) [CYAMF] [CYNAML] [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [Respondent]
(Before [you were / he was/ she was] 18 years old, did [you / he / she] have...)
A speech impairment?
1. Yes  5. No

H36. (CATI) [CYAMF] [CYNAML] [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [Respondent]
(Before [you were / he was/ she was] 18 years old, did [you / he / she] have...)
An allergic condition?
1. Yes  5. No
H37. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
(Before [you were / he was/ she was] 18 years old, did [you / he / she] have...) 
Heart trouble?
  1. Yes  5. No

H38. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
(Before [you were / he was/ she was] 18 years old, did [you / he / she] have...) 
Chronic ear problems or infections?
  1. Yes  5. No

H39. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
Before [you were / he was/ she was] 18 years old, did [you / he / she] have any of the following childhood diseases: Epilepsy or seizures?
  1. Yes  5. No

H40. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
(Before [you were / he was/ she was] 18 years old, did [you / he / she] have...) 
Severe headaches or migraines?
  1. Yes  5. No

H41. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
(Before [you were / he was/ she was] 18 years old, did [you / he / she] have...) 
Stomach problems?
  1. Yes  5. No

H44. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
(Before [you were / he was/ she was] 18 years old, did [you / he / she] have...) 
Drug or alcohol problems?
  1. Yes  5. No

H45. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
(Before [you were / he was/ she was] 18 years old, did [you / he / she] have...) 
Any other emotional or psychological problems?
  1. Yes  5. No

H34-H45 GRID. (WEB) Before [you were / he was/ she was] 18 years old, did [you / he / she] have any of the following childhood diseases:

<table>
<thead>
<tr>
<th>Disease Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Yes</td>
</tr>
<tr>
<td>A respiratory disorder such as bronchitis, wheezing, hay fever, shortness of breath, or sinus infection.</td>
</tr>
<tr>
<td>A speech impairment.</td>
</tr>
<tr>
<td>An allergic condition.</td>
</tr>
<tr>
<td>Heart trouble.</td>
</tr>
<tr>
<td>Chronic ear problems or infections.</td>
</tr>
<tr>
<td>Epilepsy or seizures.</td>
</tr>
<tr>
<td>Severe headaches or migraines.</td>
</tr>
<tr>
<td>Stomach problems.</td>
</tr>
</tbody>
</table>
CH END RULE: Whether Spouse-Partner in FU (CYAQRTH=201-222, CYFUHU=FU, FUMI)

1. Spouse-Partner → REPEAT H25CKPT - H45; 5. No Spouse-Partner
   Then GO TO H48CKPT

End H25_H45

OFUM Poor Health

H48CKPT. CAI Checkpoint: Whether There are OFUMs in the FU (CYFUHU=FU, FUMI & CYAQRTH>222)

1. OFUMs 5. No OFUMs → GO TO H50ACKPT

H49. (CATI) Now about the rest of your family living there — are any family members in poor health?

1. Yes 5. No → GO TO H49COVID

GO TO H50

(WEB) The next question is about the rest of your family living there. Are any of these family members in poor health?

1. Yes 5. No → GO TO H49COVID

GO TO H50

H50. (CATI) Who is that?

- ENTER all that apply
- PROBE: Any others?

1 – 24. [CYNAMF] [CYNAML], [CYAQRTH], [CYFUHU] AQSN list of OFUMs if FU, FUMI

(WEB) Who is that?

Please select all that apply.

1 – 24. [CYNAMF] [CYNAML] (age [AGEIWDATE]) AQSN list of OFUMs if FU, FUMI

OFUM COVID-19

H49COVID. (CATI) Still thinking about the rest of your family living there, has anyone had COVID-19? Please include those diagnosed or tested positive with COVID-19 and those who you or a physician (or other health care provider) believe probably have had it.

1. Yes 5. No → GO TO H51COVID

GO TO H50COVID

(WEB) Still thinking about the rest of your family living there, has anyone had COVID-19? Please include those DIAGNOSED or TESTED POSITIVE with COVID-19 and those who you or a physician or other health care provider BELIEVE probably have had it.

1. Yes 5. No → GO TO H51COVID

GO TO H50COVID
H50COVID. (CATI) Who is that?
- ENTER all that apply
- PROBE: Any others?

1 – 24. [CYNAMF] [CYNAML], [CYAQRTH], [CYFUHU] AQSN list of OFUMs if FU, FUMI

(WEB) Who is that?
Please select all that apply.

1 – 24. [CYNAMF] [CYNAML] (age [AGEIWDATE]) AQSN list of OFUMs if FU, FUMI

H51COVID. (CATI) Still thinking about the rest of your family living there, has anyone had a vaccine for COVID-19? If someone’s vaccine requires 2 shots, please include them even if they haven’t yet received their second shot.

1. Yes 5. No → GO TO H50ACKPT

GO TO H52COVID

(WEB) Still thinking about the rest of your family living there, has anyone had a vaccine for COVID-19? If someone’s vaccine requires 2 shots, please include them even if they haven’t yet received their second shot.

1. Yes 5. No → GO TO H50ACKPT

GO TO H52COVID

H52COVID. (CATI) Who is that?
- ENTER all that apply
- PROBE: Any others?

1 – 24. [CYNAMF] [CYNAML], [CYAQRTH], [CYFUHU] AQSN list of OFUMs if FU, FUMI

(WEB) Who is that?
Please select all that apply.

1 – 24. [CYNAMF] [CYNAML] (age [AGEIWDATE]) AQSN list of OFUMs if FU, FUMI

OFUM Dementia Screener
H50B-H50I: All rights reserved. Copyright 2008 by Washington University in St. Louis, Missouri.

H50ACKPT[1..24]. CAI Checkpoint: Whether FU Member is OFUM Age 65+ and in the FU, Moved Out or Institutional Health/Other; or REFERENCE PERSON/SPouse-PARTNER Age 65+ and Moved Out or Institutional Health/Other

[1..24]=AQSN of FU Member

1. OFUM Age 65+ (CYAQRTH>222; AGEIWDATE>64; CYFUHU=FU, FUMI, MO, HLTH, OTH)
3. RP (SP) Age 65+ (CYAQRTH=101-222; AGEIWDATE>64; CYFUHU=MO, HLTH, OTH)
5. All Others

GO TO H59A

RULE

SECTION_H.H50A_H50I[1..24]=AQSN of FU Member
AQSN. AQSN of FU Member. Assigned.
H50B. 
Next, we’d like to know about changes that [you / [CYNAMF] [CYNAML]] may have had in the last several years 
[THERE PERSON IS NOT R: because of a thinking or memory problem].
In the last several years, has there been a change in problems [you / he / she] may have with judgment, for example, problems making decisions, making bad financial decisions, or with thinking?

1. Yes, a change  5. No, no change

H50C. 
In the last several years, has there been a change in...
The amount of interest [you / he / she] may have in hobbies or activities?

1. Yes, a change  5. No, no change

H50D. 
[Your / His / Her] repeating the same things over and over, such as questions, stories, or statements?

1. Yes, a change  5. No, no change

H50E. 
The trouble [you / he / she] may have learning how to use a tool, appliance or gadget like a TV remote?

1. Yes, a change  5. No, no change

H50F. 
[Your / His / Her] forgetting the correct month or year?

1. Yes, a change  5. No, no change

H50G. 
The trouble [you / he / she] may have handling complicated money matters, like balancing a checkbook or paying bills?

1. Yes, a change  5. No, no change

H50H. 
The trouble [you / he / she] may have remembering appointments?

1. Yes, a change  5. No, no change

H50I. 
Daily problems [you / he / she] may have with thinking and/or memory?

1. Yes, a change  5. No, no change
Next, we’d like to know about changes that [you / [CYNAMF] [CYNAML]] may have had in the last several years [THIS PERSON IS NOT R: BECAUSE OF A THINKING OR MEMORY PROBLEM]. In the last several years, please indicate whether has there been A CHANGE IN each of the following:

<table>
<thead>
<tr>
<th></th>
<th>1. Yes, there has been a change</th>
<th>5. No, no change</th>
</tr>
</thead>
<tbody>
<tr>
<td>H50B. Problems [you / he / she] may have with judgment, for example, problems making decisions, making bad financial decisions, or with thinking.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>H50C. The amount of interest [you / he / she] may have in hobbies or activities.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>H50D. [Your / His / Her] repeating the same things over and over, such as questions, stories, or statements.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>H50E. The trouble [you / he / she] may have learning how to use a tool, appliance or gadget like a TV remote.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>H50F. [Your / His / Her] forgetting the correct month or year.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>H50G. The trouble [you / he / she] may have handling complicated money matters, like balancing a checkbook or paying bills.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>H50H. The trouble [you / he / she] may have remembering appointments.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>H50I. DAILY problems [you / he / she] may have with thinking and/or memory.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

All rights reserved. Copyright 2008 by Washington University in St. Louis, Missouri.

---

**Mental Health Screener (Respondent)**

**H59A RULE: Who is Respondent**

<table>
<thead>
<tr>
<th>R=RP, SP (RESPONDENT=1, 2, 3)</th>
<th>R=OFUM, Proxy (RESPONDENT=4, 7)</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO H61D2</td>
<td></td>
</tr>
</tbody>
</table>

**H59A. (CATI) 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

- (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?) Nervous?
  - 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

- (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?) Restless or fidgety?
  - 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. *(CATI)* (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. *(CATI)* (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. *(CATI)* (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

H59A-H59F GRID. *(WEB)* Now please think about feelings you may have had over the PAST 30 days. In the past 30 days, about how often did you feel each of the following:

<table>
<thead>
<tr>
<th>Feeling</th>
<th>All of the time</th>
<th>Most of the time</th>
<th>Some of the time</th>
<th>A little of the time</th>
<th>None of the time</th>
</tr>
</thead>
<tbody>
<tr>
<td>So sad nothing could cheer you up.</td>
<td>o</td>
<td>o</td>
<td>o</td>
<td>o</td>
<td>o</td>
</tr>
<tr>
<td>Nervous.</td>
<td>o</td>
<td>o</td>
<td>o</td>
<td>o</td>
<td>o</td>
</tr>
<tr>
<td>Restless or fidgety.</td>
<td>o</td>
<td>o</td>
<td>o</td>
<td>o</td>
<td>o</td>
</tr>
<tr>
<td>Hopeless.</td>
<td>o</td>
<td>o</td>
<td>o</td>
<td>o</td>
<td>o</td>
</tr>
<tr>
<td>That everything was an effort.</td>
<td>o</td>
<td>o</td>
<td>o</td>
<td>o</td>
<td>o</td>
</tr>
<tr>
<td>Worthless.</td>
<td>o</td>
<td>o</td>
<td>o</td>
<td>o</td>
<td>o</td>
</tr>
</tbody>
</table>

H59J RULE: Whether One or More H59A-H59F Endorsed As All/Most/Some

One or More H59A-H59F=1, 2, 3 All Others \rightarrow GO H61D2

H59J. *(CATI)* 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

*(WEB)* How much do these feelings usually interfere with your life or activities?
1. A lot  2. Some  3. A little  5. Not at all
Current Health Insurance

H61D2. *(CATI)* Next, please think about your [family’s] health insurance, including coverage obtained through employment, or purchased directly, or through a government program like Medicare and Medicaid. [Do you / Does anyone in your family] currently have health insurance or health care coverage?

1. Yes  5. No → GO TO H61K

GO TO H61D3 RULE

*(WEB)* Next, please think about your [family’s] health insurance, including coverage obtained through employment, purchased directly, or obtained through a government program like Medicare and Medicaid. [Do you / Does anyone in your family living there] currently have health insurance or health care coverage?

1. Yes  5. No → GO TO H61K

GO TO H61D3 RULE

H61D3 RULE: Number of FU Members

<table>
<thead>
<tr>
<th>More Than One FU Member</th>
<th>Only One FU Member</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>→ (Assign H61D3 &amp; H61DAQSN=AQSN of FU Member)</td>
</tr>
<tr>
<td></td>
<td>GO TO H61E RULE</td>
</tr>
</tbody>
</table>

H61D3. *(CATI)* Who is covered (by health insurance)?

- ENTER all that apply
- PROBE: Any others?

1 – 24. [CYNAMF] [CYNAML], [CYAQRTH], [CYFUHU]  AQSN list of FU Members if FU, FUMI

GO TO H61D4CKPT

*(WEB)* Who is covered by health insurance? *Please select all that apply.*

1 – 24. [CYNAMF] [CYNAML] (age [AGEIWDATE])  AQSN list of FU Members if FU, FUMI

GO TO H61D4CKPT

H61D4CKPT. Number of FU Members Selected at H61D3

<table>
<thead>
<tr>
<th>1. One FU Member</th>
<th>→ GO TO H61E RULE</th>
</tr>
</thead>
<tbody>
<tr>
<td>5. More Than One FU Member</td>
<td></td>
</tr>
</tbody>
</table>

H61D4. *(CATI)* Does everyone have the same health insurance or health care coverage?

FU Members With Health Care Coverage/Insurance:
[List of H61D3 Selections]

1. Yes  5. No

*(WEB)* Does everyone have the same health insurance or health care coverage?

1. Yes  5. No
SECTION_H.H61E_H61G[1..24] [1..24]=AQSN of FU Member
H61DAQSN. AQSN of FU Member. Assigned.

H61E RULE: Whether FU Members Have Different or Same Insurance

<table>
<thead>
<tr>
<th>Different Insurance (H61D4&lt;&gt;Yes)</th>
<th>Same Insurance (H61D4=Yes)</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASK H61E-H61G for Each FU Member Selected at H61D3</td>
<td>ASK H61E-H61G for Just First FU Member Selected at H61D3</td>
</tr>
</tbody>
</table>

H61E. (CATI) [H61D4<>YES: [CYNAMF] [CYNAML], [CYAQRTH], [CYFUHU]]

[LOOPS: What is the source of [H61D4=YES]: that coverage? / ALL OTHERS: [your / [CYNAMF]’s] health insurance or health care coverage -- is it provided through an employer, privately purchased, a government program like Medicare or Medicaid, or what?] / LOOP 2-24: What about the source of [your / [CYNAMF]’s] coverage (is it provided through an employer, privately purchased, a government program like Medicare or Medicaid, or what)?]

- **IF needed/IF R mentions the name of the provider:** Is it provided through an employer, privately purchased, a government program like Medicare or Medicaid, or what?
- **IF R mentions government plan:** Is that Medicare, Medi-gap, Medicaid or a state program, military provided such as Tricare, ChampUS or ChampVA, Indian health insurance or, some other plan?
- **IF needed (if Affordable Care Act/Obamacare/Health Insurance Exchanges mentioned):** Was that a privately purchased health insurance plan or Medicaid/[STATEMEDPROG]/[SCHIPNAME]?
- **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. Veterans Administration (VA)
10. Other

**SIGNAL for Medicare or Medicaid not selected at H61E (CATI ONLY):** IWER: READ QUESTION TO VERIFY MEDICARE AND/OR MEDICAID COVERAGE: How about [3 NOR 5 SELECTED: Medicare and Medicaid, [PYSTATRESIDE<>FC,DK, RF, NA: [STATEMEDPROG], [SCHIPNAME]] / 3 SELECTED BUT NOT 5: Medicaid, [PYSTATRESIDE<>FC,DK, RF, NA: [STATEMEDPROG], [SCHIPNAME]] / 5 SELECTED BUT NOT 3: Medicare] / ([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

(WEB) [LOOP 1: What is the source of [H61D4=YES]: that coverage? / ALL OTHERS: [your / [CYNAMF] [CYNAML]’s] health insurance or health care coverage / LOOP 2-24: What about the source of [your / [CYNAMF] [CYNAML]’s] coverage]?

Please select all that apply.

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. Veterans Administration (VA)
10. Other
H61ESPEC RULE: Whether Other Insurance Selected at H61E

| Other (H61E=97) | All Others → GO TO H61F RULE |

H61ESPEC. (CATI) [H61D4<>YES: [CYNAMF] [CYNAML], [CYAQRTH], [CYFUHU]]
Could you tell me a little more about that other plan or program?
- Health Plan(s) Selected:
  - [List of H61E Selections]
- String 100

(WEB) Could you tell us a little more about that other plan or program?
- String 100

H61E2CKPT. CAI Checkpoint. Whether FU Members Have Different Insurance & This FU Member is < Age 19

<table>
<thead>
<tr>
<th>Different Insurance (H61D4=No, DK, RF, NA)</th>
<th>5. Same Insurance (H61D4=Yes)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. FU Member Age &lt;19</td>
<td>5. FU Member Age &gt;18</td>
</tr>
</tbody>
</table>

GO TO H61F RULE

H61E2. (CATI) [H61D4<>YES: [CYNAMF] [CYNAML], [CYAQRTH], [CYFUHU]]

Interviewer Checkpoint:
- Is that [PYSTATETERSIDE<>FC, DK, RF, NA: [SCHIPNAME],] 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:
- [List of H61E Selections]

1. Yes 5. No

(WEB) Is that [PYSTATETERSIDE<>FC, DK, RF, NA: [SCHIPNAME],] the state health insurance plan for uninsured children?

1. Yes 5. No

H61F RULE: Whether Employer Provided Insurance Selected at H61E

| Employer Provided (H61E=1) | All Others → GO TO H61G RULE |

H61F. (CATI) [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:
- [List of H61E Selections]

1 – 24. [CYNAMF] [CYNAML], [CYAQRTH], [CYFUHU]

25. Parent of [CYNAMF] [CYNAML], outside of FU

97. Other person outside of FU—specify (H61FSPEC. Specify (String 100))

(WEB) Whose employer provides [H61D4=YES: this / ALL OTHERS: [your / [CYNAMF] [CYNAML]’s] health insurance?
Please select up to three (3) choices.

1 – 24. [CYNAMF] [CYNAML] (age [AGEIWDATE])

25. One of [my / [CYNAMF] [CYNAML]’s] parents not living here

97. Someone else not living here - Please specify: (H61FSPEC)

H61G RULE: Whether Privately Purchased Insurance Selected at H61E

Privately Purchased (H61E=2)   All Others  → GO TO H61E END RULE

H61G. (CATI) [H61D4<>YES: [CYNAMF] [CYNAML], [CYAQRTH], [CYFUHU]]

Who is the policy holder on [this / [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:
[List of H61E Selections]

1 – 24. [CYNAMF] [CYNAML], [CYAQRTH], [CYFUHU]

25. Parent of [CYNAMF] [CYNAML], outside of FU

97. Other person outside of FU-specify (H61GSPEC. Specify (String 100))

(WEB) Who is the policy holder on [H61D4=YES: this / ALL OTHERS: [your / [CYNAMF] [CYNAML]’s]] private health insurance?

The policy holder is the person who purchased the insurance; other family members who are covered are called dependents.

Please select up to three (3) choices.

1 – 24. [CYNAMF] [CYNAML] (age [AGEIWDATE])

25. One of [my / [CYNAMF] [CYNAML]’s] parents not living here

97. Someone else not living here - Please specify: (H61GSPEC)

H61E END RULE: Whether FU Members Have Different Insurance & There are More FU Members Selected at H61D3

Different Insurance (H61D4<>Yes)   Same Insurance (H61D4=Yes)

More FU Members   No More FU Members

REPEAT H61E - H61G for Each FU Member; Then GO TO H61JCKPT

End H61E_H61G

H61JCKPT. CAI Checkpoint: Whether Any FU Member Has Employer or Private Insurance, or Medicare or MediGap

1. Employer Provided, Privately Purchased, Medicare or MediGap (H61E=1, 2, 3, or 4)  5. All Others  → GO TO H61K
H61J, H61JPER. *(CATI)* How much are your [and your family's] health insurance premiums [altogether]? Please only include amounts that you [and your family] paid, either directly or through automatic deductions from pay. Do not include amounts paid by someone outside of your family.

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

$0 → GO TO H61K  
$1 – 99,997 DK/RF → GO TO H61JD

The amount entered is: [H61J] per ____

**•** SELECT the unit of time below

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

7. Other-specify (H61JPERSPEC. Specify. (String 100))

GO TO H61K

*(WEB)* How much are [your / your and your family's] health insurance premiums [altogether]? Please only include amounts that [you / you and your family living there] paid, either directly or through automatic deductions from pay. Do not include amounts paid by someone outside of your family.

$0 – 99,997 .00 per  

3. Week  4. Two weeks  5. Month  6. Year  NA → GOTO H61JDH61JF_W

CHECK: Please enter a number from 0 to 99997.

SIGNAL: Please select a unit of time.

GO TO H61K

H61JD. *(CATI ONLY)* Are they $200 or more per month?

1. Yes  5. No DK/RF → GO TO H61K

H61JE. *(CATI ONLY)* Are they $350 or more per month?

1. Yes  5. No DK/RF → GO TO H61K

H61JF. *(CATI ONLY)* Are they $100 or more per month?

1. Yes  5. No DK/RF → GO TO H61K

H61JDH61JF_W. *(WEB ONLY)* What is your best estimate?

1. Less than $100 per month  2. $100 to less than $200 per month  3. $200 to less than $350 per month  4. $350 or more per month

**No Health Insurance PYear or P2Year**

H61K. *(CATI)* Did you [or anyone else in the family living there] go without health insurance at any time during [P2YEAR] or [PYEAR]?

1. Yes  5. No → GO TO H62CKPT

GO TO H61L RULE

*(WEB)* Did you [or anyone else in the family living there] go without health insurance at any time during [P2YEAR] or [PYEAR]?

1. Yes  5. No → GO TO H62CKPT

GO TO H61L RULE
H61L RULE: Number of FU Members

<table>
<thead>
<tr>
<th>One FU Member</th>
<th>→ (Assign H61L &amp; H61MAQSN=AQSN of FU Member)</th>
<th>More Than One FU Member</th>
</tr>
</thead>
</table>

GO TO H61M RULE

H61L. (CATI) Who was that?

- ENTER all that apply
- PROBE: Any others?

1 – 24. [CYNAMF] [CYNAML], [CYAQRTH], [CYFUHU] AQSN FU Member list: FU, FUMI & CYYRBRN<CYEAR

DK/RF → GO TO H64

SECTION_H.H61M_H61N[1..24] [1..24]=AQSN of FU Member

H61MAQSN. AQSN of FU Member. Assigned.

H61M RULE: Whether FU Member Born in P2YEAR or Earlier

<table>
<thead>
<tr>
<th>Born P2YEAR or Earlier (CYYRBRN ≤ P2YEAR)</th>
<th>All Others</th>
</tr>
</thead>
</table>

GO H61N RULE

H61M. (CATI) [CYNAMF] [CYNAML], [CYAQRTH], [CYFUHU]

For how many months in [P2YEAR] [were you / was [CYNAMF]] uninsured?

0 – 12

(WEB) For how many months in [P2YEAR] [were you / was [CYNAMF]] uninsured?

0 – 12 Number of months

H61N RULE: Whether FU Member Born in PYEAR or Earlier

<table>
<thead>
<tr>
<th>Born PYEAR or Earlier (CYYRBRN ≤ PYEAR)</th>
<th>All Others</th>
</tr>
</thead>
</table>

GO H61N END RULE

H61N. (CATI) [CYNAMF] [CYNAML], [CYAQRTH], [CYFUHU]

(For how many months) in [PYEAR] ([were you / was [CYNAMF]] uninsured)?

0 – 12

(WEB) For how many months in [PYEAR] [were you / was [CYNAMF]] uninsured?

0 – 12 Number of months

H61N END RULE: Whether More FU Members Selected at H61L

<table>
<thead>
<tr>
<th>More FU Members</th>
<th>→ REPEAT H61M - H61N; Max=24;</th>
</tr>
</thead>
<tbody>
<tr>
<td>No More FU Members</td>
<td></td>
</tr>
</tbody>
</table>

Then GO TO H62CKPT

End H61M_H61N
Medicare Linkage (Respondent)

H62CKPT. CAI Checkpoint: Who is Respondent; Whether Medicare# Already Collected; Age; Whether Has Medicare

<table>
<thead>
<tr>
<th>R=RP or SP (RESPONDENT=1, 2, 3)</th>
<th>5. All Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Medicare# Collected or R Refused 3 or More Waves (PYPERSINFO.MEDICARENUM=1)</td>
<td>Medicare# Not Collected or Not Valid (PYPERSINFO.MEDICARENUM=0)</td>
</tr>
<tr>
<td>3. R is Age 65+ (AGEIWDATE=65+)</td>
<td>4. R Has Medicare (H61E=3)</td>
</tr>
</tbody>
</table>

GO TO H64

H62A. (CATI) We would like to learn more about people’s health and how health care is used. The best place to get this information is the Centers for Medicare and Medicaid Services or C.M.S. We are therefore asking F.E.S. (Family Economics Study) 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 C.M.S.]

Under the Privacy Act of 1974, providing your number is a voluntary decision. The benefits you may be receiving from C.M.S. 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

GO TO H62H

(WEB) We would like to learn more about people’s health and how health care is used. The best place to get this information is the Centers for Medicare and Medicaid Services or C.M.S. We are therefore asking F.E.S. (Family Economics Study) 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 C.M.S.]

Could you tell me your Medicare number for this purpose?

Under the Privacy Act of 1974, providing your number is a voluntary decision. The benefits you may be receiving from C.M.S. will not be affected in any way by your decision.

1. Yes 5. No → GO TO H64

GO TO H62H

H62H. (CATI) What is your 11-digit Medicare number?

- ENTER the 11-digit number, including letter(s) and number(s)

_ _ _ _ _ _ _ _ _ _ _

(WEB) What is your 11-digit Medicare number? This can include letters and numbers.

_ _ _ _ _ _ _ _ _ _ _

PYear Health Care Expenses

H64. (CATI) These next questions are about health care expenditures that you [and your family] may have had during [PYEAR].

About how much did you [and your family] pay out-of-pocket for nursing home and hospital bills in [PYEAR]?

$ 0 – 999,997 → GO TO H70  DK/RF → GO TO H65

(WEB) The next questions are about health care expenditures that you [and your family living there] may have had during [PYEAR]. About how much did you [and your family living there] pay out-of-pocket for nursing home and hospital bills in [PYEAR]?
H65. (CATI ONLY) Would it amount to $1,000 or more?
1. Yes  5. No [DK/RF] → GO TO H70

H66. (CATI ONLY) $2,000 or more?
1. Yes  5. No [DK/RF] → GO TO H70

H69. (CATI ONLY) $500 or more?
1. Yes  5. No [DK/RF] → GO TO H70

H67. (CATI ONLY) $8,000 or more?
1. Yes  5. No [DK/RF] → GO TO H70

H65H69_W. (WEB ONLY) What is your best estimate?
1. Less than $500  2. $500 to less than $1,000
3. $1,000 to less than $2,000  4. $2,000 to less than $8,000
5. $8,000 or more

H70. (CATI) About how much did you [and your family] pay out-of-pocket for doctor, outpatient surgery, and dental bills in [PYEAR]?
$ 0 – 999,997 → GO TO H76  [DK/RF] → GO TO H71

(WEB) About how much did you [and your family living there] pay out of pocket for doctor, outpatient surgery, and dental bills in [PYEAR]?
$ 0 – 999,997.00 → GO TO H76  NA → GO TO H71H74_W

H71. (CATI ONLY) Would it amount to $1,000 or more?
1. Yes  5. No [DK/RF] → GO TO H76

H72. (CATI ONLY) $2,500 or more?
1. Yes  5. No [DK/RF] → GO TO H76

H74. (CATI ONLY) $500 or more?
1. Yes  5. No [DK/RF] → GO TO H76

H71H74_W. (WEB ONLY) What is your best estimate?
1. Less than $500  2. $500 to less than $1,000
3. $1,000 to less than $2,500  4. $2,500 or more

H76. (CATI) About how much did you [and your family] pay out-of-pocket for prescriptions, in-home medical care, special facilities, and other services in [PYEAR]?
$ 0 – 999,997 → GO TO SECTION J  [DK/RF] → GO TO H77

(WEB) About how much did you [and your family living there] pay out of pocket for prescriptions, in home medical care, special facilities, and other services in [PYEAR]?
$ 0 – 999,997.00 → GO TO SECTION J  NA → GO TO H77H81_W
CHECK: Please enter a number from 0 to 999997.

H77. *(CATI ONLY)* Would it amount to $500 or more?
   1. Yes  5. No  DK/RF → GO TO SECTION J
   ↓
H78. *(CATI ONLY)* $2,500 or more?  H81. *(CATI ONLY)* $200 or more?
   1. Yes  5. No  DK/RF  1. Yes  5. No  DK/RF
   ↓  ↓
   GO TO SECTION J  GO TO SECTION J

H79. *(CATI ONLY)* $10,000 or more?
   1. Yes  5. No  DK/RF
   ↓
   GO TO SECTION J

H77-H81_W. *(WEB ONLY)* What is your best estimate?
   1. Less than $200      2. $200 to less than $500
   3. $500 to less than $2,500  4. $2,500 to less than $10,000
   5. $10,000 or more
   ↓
   GO TO SECTION J

End SECTION_H
Section J: Marriages; Children

1JCKPT[1..24]. Section J Qualifier[1..24]=AQSNS of FU Member

<table>
<thead>
<tr>
<th>Reinterview, Splitoff</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. TypeA. Male Reference Person + Female Spouse</strong>&lt;br&gt;<strong>Age 15-44; Same Married Couple as Last Wave</strong>&lt;br&gt;<strong>(CYAQRTH=101 &amp; PYAQRTH=102 &amp; CYFUHU=FU &amp; PYFUHU=FUMI) and (CYAQRTH=201 &amp; PYAQRTH=202 &amp; CYFUHU=FU &amp; PYFUHU=FUMI)</strong></td>
</tr>
<tr>
<td><strong>2. TypeANoJ. Male Reference Person + Female Spouse</strong>&lt;br&gt;<strong>Age 45+; Same Married Couple as Last Wave</strong>&lt;br&gt;<strong>(CYAQRTH=101 &amp; PYAQRTH=102 &amp; CYFUHU=FU &amp; PYFUHU=FUMI) and (CYAQRTH=201 &amp; PYAQRTH=202 &amp; CYFUHU=FU &amp; PYFUHU=FUMI)</strong></td>
</tr>
</tbody>
</table>

As a Couple: Update Bio & Adopted Kids (J28-AS8A)

---

| **3. TypeB1. Male Reference Person or Spouse-Partner was**<br>**RP or SP Last Wave**<br>**(CYAQRTH=101, 201, 221 & PYAQRTH=202 & CYFUHU=FUMI & PYFUHU=FUMI)** |
| **4. TypeB2. Female Reference Person**<br>**or Spouse-Partner Age 15-44 was RP or SP Last Wave**<br>**(CYAQRTH=102, 202, 222 & PYAQRTH=101-222 & CYFUHU=FUMI & PYFUHU=FUMI & AGEIWDATE=15-44)** |
| **5. TypeB3. Female Reference Person**<br>**or Spouse-Partner Age 45+ was RP or SP Last Wave**<br>**(CYAQRTH=102, 202, 222 & PYAQRTH=101-222 & CYFUHU=FUMI & PYFUHU=FUMI & AGEIWDATE=45-120)** |

No Section J for this Couple

---

| **6. TypeC1A. Male Reference Person or Spouse-Partner**<br>a) was OFUM Last Wave, b) was INST RP or SP Last Wave, c) is New<br>**(CYAQRTH=101, 201, 221 & (PYAQRTH=202 & CYFUHU=FUMI & PYFUHU=FUMI); or (PYAQRTH=101-222 & CYFUHU=FUMI & PYFUHU=INST); or (PYAQRTH=NULL & PYFUHU=NULL & CYFUHU=FUMI))** |
| **7. TypeC1B. Female Reference Person or Spouse-Partner**<br>a) was OFUM Last Wave, b) was INST RP or SP Last Wave, c) is New<br>**(CYAQRTH=102, 202, 222 & (PYAQRTH=222 & CYFUHU=FUMI & PYFUHU=FUMI); or (PYAQRTH=101-222 & CYFUHU=FUMI & CYFUHU=INST); or (PYAQRTH=NULL & CYFUHU=NULL & CYFUHU=FUMI))** |

Update Marriages (J2-J12YR); Update Bio & Adopted Kids (J28-AS8A)

---

| **9. TypeC1D. New OFUM Age 15-44, 16; Returning OFUM Age 15-16, 16**<br>**(CYAQRTH=222 & (CYFUHU=FUMI & AGEIWDATE=15-44 or AGEWISE=Yes)) or (CYFUHU=FUMI & AGEIWDATE=15-16 or AGEWISE=Yes))** |
| **10. TypeC1NoJ. New or Returning OFUM Age 15-44**<br>**(CYAQRTH=222 & CYFUHU=FUMI & AGEIWDATE=15-44)** |
| All Marriages (J12A-J26YR); All Bio & Adopted Kids (J30-OS70) |
| **11. TypeC2A. New or Returning Male RP/SP**<br>**(CYAQRTH=101, 201, 221 & CYFUHU=FUMI)** |
| **12. TypeC2B. New or Returning Female RP/SP**<br>**(CYAQRTH=102, 202, 222 & CYFUHU=FUMI)** |
| All Marriages (J12A-J26YR); All Bio & Adopted Kids (J30-OS70) |
| **14. TypeC2D. New or Returning OFUM Age 15-44, 16**<br>**(CYAQRTH=222 & CYFUHU=FUMI & AGEWISE=Yes))** |
| **15. TypeC2NoJ. New or Returning OFUM Age 15-44**<br>**(CYAQRTH=222 & CYFUHU=FUMI & AGEWISE=Yes))** |
| All Marriages (J12A-J26YR); All Bio & Adopted Kids (J30-OS70) |
| **16. TypeC1E. Returning OFUM Age 17-44**<br>**(CYAQRTH=222 & CYFUHU=FUMI & AGEIWDATE=17-44)** |
| All Marriages (J12A-J26YR); Update Bio Kids (J28-OS70) |
| **17. TypeC1NoJ. New or Returning OFUM Age 15-44**<br>**(CYAQRTH=222 & CYFUHU=FUMI & AGEIWDATE=15-44)** |
| No Section J for this FU Member |

---

| **95. AllOthersC1. New or Returning OFUM Age**<br>**<15**<br>(CYAQRTH=222 & CYFUHU=FUMI & AGEIWDATE=15-44) |
| **96. AllOthersC2. New or Returning OFUM Age**<br>**<15**<br>(CYAQRTH=222 & CYFUHU=FUMI & AGEIWDATE=15-44) |
| No Section J for this FU Member |

---

| **97. All Others. FU Member Moved Out, Died or is Institutional**<br>**(CYAQRTH=101-982 & CYFUHU=MO, DIED, INST)** |
| No Section J for this FU Member |

**J1CKPT[x]** is assigned to each FU member where [x] is that person's AQSN, 1-24; regardless of AQSN, the first loop of Section J is always asked about Reference Person. The 2nd loop is always asked about Spouse-Partner if there is one in the FU.
FIRST ITERATION OF SECTION J: J1A. (CATI ONLY) Now I have some questions about marriage and children.

- ENTER [1] to continue
- Continue

J1A RULE: J1CKPT Type

<table>
<thead>
<tr>
<th>Type A (J1CKPT=1)</th>
<th>Type B (J1CKPT=3, 4, 5)</th>
<th>Type C (J1CKPT=6, 7, 9, 11, 12, 14, 16)</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO J27CKPT</td>
<td>↓</td>
<td>GO TO J12A</td>
</tr>
</tbody>
</table>

Marital Status - Update (Type B: J1CKPT=3, 4, 5)

J2. AQSN of FU Member

J3CKPT. CAI Checkpoint: Marital Status

1. Widowed (Marital=3)
2. Separated; or Married Partner (Marital=5, 1)
3. Divorced (Marital=4)
4. Married Reference Person, Spouse, OFUM (Marital=1)
5. Never Married (Marital=2)

GO TO J6MO
GO TO J5MO
GO TO J7MO
GO TO J27CKPT

SECTION_J[1..24].J4_J12 [1..24]=AQSNI of FU Member

J4MO, J4YR. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [Respondent]

In what month and year [were you / was [REFERENCE PERSON] / [SPOUSE-PARTNER]] widowed?

- SELECT Month and [Enter] to go to next screen for year
- IF NECESSARY: What would be your best estimate?
- IF NEEDED: I understand that it may be difficult for you to answer these questions, but please do your best.

Select ▼

4. April 12. December 24. Fall (Sep-Nov)

The month entered is: [J4MO]

- ENTER the year below

1901 – [CYEAR] 09996. [P2YEAR]-[CYEAR] but don’t know which year (SP_0B)
09997. Before [P2YEAR] but don’t know exact year (SP_0A)

WEB [FIRST ITERATION SECTION_J: Next are questions about marriage and children.]

In what month and year [were you / was [REFERENCE PERSON] / [SPOUSE-PARTNER]] widowed?

We understand that it may be difficult for you to answer these questions, but please do your best.

If you do not know the month, please select the season.

Select ▼


1901 – [CYEAR] Year
09996. [P2YEAR]-[CYEAR] but don’t know which year (SP_0B)
09997. Before [P2YEAR] but don’t know exact year (SP_0A)

CHECK: Please enter a date before today.
J4 END RULE: Whether Widowed Before P2YEAR or in P2YEAR or Later

<table>
<thead>
<tr>
<th>Widowed Before P2YEAR</th>
<th>Widowed in P2YEAR or Later</th>
<th>All Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>(J4YR&lt;P2YEAR, 9997)</td>
<td>(J4YR=P2YEAR-CYEAR, 9996)</td>
<td>(J4YR=DK, RF, NA)</td>
</tr>
<tr>
<td>GO TO J27CKPT</td>
<td>GO TO J7MO</td>
<td>GO TO J27CKPT</td>
</tr>
</tbody>
</table>

J5MO, JSYR. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
In what month and year did [your / [REFERENCE PERSON]'s / [SPOUSE-PARTNER]'s] (divorce/annulment) become final?
- SELECT Month and [Enter] to go to next screen for year
- IF NECESSARY: What would be your best estimate?
- IF NEEDED: I understand that it may be difficult for you to answer these questions, but please do your best.

Select
1. January
2. February
3. March
4. April
5. May
6. June
7. July
8. August
9. September
10. October
11. November
12. December
21. Winter (Dec-Feb)
22. Spring (Mar-May)
23. Summer (Jun-Aug)
24. Fall (Sep-Nov)

The month entered is: [J5MO]
- ENTER the year below

1901 – [CYEAR] | 0 9996. [P2YEAR]–[CYEAR] but don’t know which year (SP_08)
| 0 9997. Before [P2YEAR] but don’t know exact year (SP_0A)

(WEB) [FIRST ITERATION SECTION_J: Next are questions about marriage and children.]
In what month and year did [your / [REFERENCE PERSON]'s / [SPOUSE-PARTNER]'s] divorce or annulment become final?
We understand that it may be difficult for you to answer these questions, but please do your best.
If you do not know the month, please select the season.

Select
Month or Season
1. January
2. February
3. March
4. April
5. May
6. June
7. July
8. August
9. September
10. October
11. November
12. December
21. Winter (Dec-Feb)
22. Spring (Mar-May)
23. Summer (Jun-Aug)

1901 – [CYEAR] Year
| 0 9996. [P2YEAR]–[CYEAR] but don’t know which year (SP_08)
| 0 9997. Before [P2YEAR] but don’t know exact year (SP_0A)

CHECK: Please enter a date before today.

J5 END RULE: Whether Divorced Before P2YEAR or in P2YEAR or Later

<table>
<thead>
<tr>
<th>Divorced Before P2YEAR</th>
<th>Divorced in P2YEAR or Later</th>
<th>All Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>(J5YR&lt;P2YEAR, 9997)</td>
<td>(J5YR=P2YEAR-CYEAR, 9996)</td>
<td>(J5YR=DK, RF, NA)</td>
</tr>
<tr>
<td>GO TO J27CKPT</td>
<td>↓</td>
<td>GO TO J27CKPT</td>
</tr>
</tbody>
</table>
J6MO, J6YR. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

[MARRIED PARTNER: Earlier you reported that [R: you are / ALL OTHERS: [PARTNER] is] married.
In what month and year did [R: you and your spouse / ALL OTHERS: [[REFERENCE PERSON] / [SPOUSE-PARTNER] and [his / her] spouse] stop living together?

- SELECT Month and [Enter] to go to next screen for year
- IF NECESSARY: What would be your best estimate?
- IF NEEDED: I understand that it may be difficult for you to answer these questions, but please do your best.

<table>
<thead>
<tr>
<th>Select</th>
<th>Month or Season</th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
</table>

The month entered is: [J6MO]

- ENTER the year below

|        | 1901 — [CYEAR]         | 0 9996. [P2YEAR]-[CYEAR] but don’t know which year (SP_0B) | 0 9997. Before [P2YEAR] but don’t know exact year (SP_0A) |

(WEB) [FIRST ITERATION SECTION_J: Next are questions about marriage and children.]

[MARRIED PARTNER: Earlier you reported that [R: you are / ALL OTHERS: [PARTNER] is] married.
In what month and year did [R: you and your spouse / ALL OTHERS: [[REFERENCE PERSON] / [SPOUSE-PARTNER]]
and [his / her] spouse] stop living together?

We understand that it may be difficult for you to answer these questions, but please do your best.
If you do not know the month, please select the season.

<table>
<thead>
<tr>
<th>Select</th>
<th>Month or Season</th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
</table>

1901 — [CYEAR] Year

|        | 0 9996. [P2YEAR]-[CYEAR] but don’t know which year (SP_0B) | 0 9997. Before [P2YEAR] but don’t know exact year (SP_0A) |

CHECK: Please enter a date before today.

J6 END RULE: Whether Current Marriage Before P2YEAR or in P2YEAR or Later

<table>
<thead>
<tr>
<th>Married Before P2YEAR</th>
<th>Married in P2YEAR or Later</th>
<th>All Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>(J6YR&lt;P2YEAR, 9997)</td>
<td>(J6YR=P2YEAR-CYEAR, 9996)</td>
<td>(J6YR=DK, RF, NA)</td>
</tr>
</tbody>
</table>

GO TO J27CKPT ↓ GO TO J27CKPT
J7MO, J7YR. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

[LOOP 1: In / LOOP 2: Please tell me again, in] what month and year did [LOOP 1: [R=R, NO SP IN FU: you / R=RP, SP IN FU: you and your spouse (last)] / R=OFUM, PROXY-NO SP IN FU: [REFERENCE PERSON] last / R=PARTNER, OFUM, PROXY & SP IN FU: [REFERENCE PERSON] and [his / her] spouse (last) / R=SPouse: you and [REFERENCE PERSON]] / LOOP 2: [R=R, SPOUSE IN FU: you and your spouse / R=RP, PARTNER IN FU: [PARTNER] and [his / her] spouse (last) / R=SPOUSE: you and your spouse (last) / R=OFUM, PROXY: [SPOUSE] and [his / her] spouse (last)] get married?

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


The month entered is: [J7MO]

• ENTER the year below

1901 – [CYEAR] 0 9996. [P2YEAR]-[CYEAR] but don’t know which year (SP_0B)
0 9997. Before [P2YEAR] but don’t know exact year (SP_0A)

(WEB) [FIRST ITERATION SECTION_J: Next are questions about marriage and children.]

In what month and year did [LOOP 1: [R=R, NO SP IN FU: you / R=RP, SP IN FU: you and your spouse last / R=OFUM, PROXY & NO SP IN FU: [REFERENCE PERSON] last / R=PARTNER, OFUM, PROXY & SP IN FU: [REFERENCE PERSON] and [his / her] spouse last / R=SPOUSE: you and [REFERENCE PERSON]] / LOOP 2: [R=R, SPOUSE IN FU: you and your spouse / R=RP, PARTNER IN FU: [PARTNER] and [his / her] spouse last / R=SPOUSE: you and your spouse (last) / R=OFUM, PROXY: [SPOUSE] and [his / her] spouse (last)] get married?

If you do not know the month, please select the season.


1901 – [CYEAR] 0 9996. [P2YEAR]-[CYEAR] but don’t know which year (SP_0B)
0 9997. Before [P2YEAR] but don’t know exact year (SP_0A)

CHECK: Please enter a date before today.

J7 END RULE: Whether Last Marriage Before P2YEAR or in P2YEAR or Later

<table>
<thead>
<tr>
<th>Married Before P2YEAR (J7YR&lt;P2YEAR, 9997)</th>
<th>Married in P2YEAR or Later (J7YR=P2YEAR-CYEAR, 9996)</th>
<th>All Others (J7YR=DK, RF, NA)</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO J27CKPT</td>
<td>GO TO J27CKPT</td>
<td>GO TO J27CKPT</td>
</tr>
</tbody>
</table>

J8. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

What (was/is) [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] spouse’s name?

• ACCEPT any name-do not probe.

String 25

(WEB) What [J3CKPT=WID, DIV: was / J3CKPT=SEP, MARR: is] [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] spouse’s name?

If you prefer not to enter this person’s name, please enter a nickname or anything that will identify this person to you.

Name String 25
J9. (CATI) [CYNAMF] [CYNAM]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

Before that, [were you / was he / was she] widowed, divorced, or had [you / he / she] never been married?

<p>| | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
</table>

GO TO J27CKPT  
GO TO J10MO  
GO TO J11MO  
GO TO J12MO  

(WEBS) Before that, [were you / was he / was she] widowed, divorced, or had [you / he / she] never been married?

<p>| | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Never married</td>
<td>3. Widowed</td>
<td>4. Divorced or marriage annulled</td>
<td>7. Other - Please specify: (J9SPEC) NA</td>
</tr>
</tbody>
</table>

GO TO J27CKPT  
GO TO J10MO  
GO TO J11MO  
GO TO J12MO  

J10MO, J10YR. (CATI) [CYNAMF] [CYNAM]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

In what month and year [were you / was he / was she] widowed?

- SELECT Month and [Enter] to go to next screen for year
- IF NECESSARY: What would be your best estimate?
- IF NEEDED: I understand that it may be difficult for you to answer these questions, but please do your best.

<p>| | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
</table>

The month entered is: [J10MO]

- ENTER the year below

<p>| | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1901 – [CYEAR]</td>
<td>0 9996. [P2YEAR]-[CYEAR] but don’t know which year (SP_0B)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>0 9997. Before [P2YEAR] but don’t know exact year (SP_0A)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

GO TO J27CKPT

(WEBS) In what month and year [were you / was he / was she] widowed?

*We understand that it may be difficult for you to answer these questions, but please do your best.*

*If you do not know the month, please select the season.*

<p>| | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
</table>

<p>| | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1901 – [CYEAR]</td>
<td>Year</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>0 9996. [P2YEAR]-[CYEAR] but don’t know which year (SP_0B)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>0 9997. Before [P2YEAR] but don’t know exact year (SP_0A)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

GO TO J27CKPT

*CHECK: Please enter a date before today.*
In what month and year did [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] divorce/annulment become final?

- **SELECT Month and [Enter] to go to next screen for year**
- **IF NECESSARY:** What would be your best estimate?
- **IF NEEDED:** I understand that it may be difficult for you to answer these questions, but please do your best.

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

The month entered is: [J11MO]

- ENTER the year below

1901 – [CYEAR] 

- O 9996. [P2YEAR]-[CYEAR] but don’t know which year (SP_0B)
- O 9997. Before [P2YEAR] but don’t know exact year (SP_0A)

*(WEB) In what month and year did [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] divorce or annulment become final? If you do not know the month, please select the season.*

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

1901 – [CYEAR] Year

- O 9996. [P2YEAR]-[CYEAR] but don’t know which year (SP_0B)
- O 9997. Before [P2YEAR] but don’t know exact year (SP_0A)

*CHECK: Please enter a date before today.*
J12MO, J12YR. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

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?
- IF NEEDED: I understand that it may be difficult for you to answer these questions, but please do your best.


The month entered is: [J12MO]

- ENTER the year below

1901 – [CYEAR] 0 9996. [P2YEAR]–[CYEAR] but don’t know which year (SP_0B) 0 9997. Before [P2YEAR] but don’t know exact year (SP_0A)

GO TO J27CKPT

(WEB) In what month and year did [you / they] stop living together?

If you do not know the month, please select the season.


1901 – [CYEAR] Year 0 9996. [P2YEAR]–[CYEAR] but don’t know which year (SP_0B) 0 9997. Before [P2YEAR] but don’t know exact year (SP_0A)

GO TO J27CKPT

CHECK: Please enter a date before today.

End J4_J12

Marital Status - Full (Type C: J1CKPT=6, 7, 9, 11, 12, 14, 16)

J12A. AQSN of FU Member

J13CKPT. CAI Checkpoint: Marital Status

1. Never Married (Marital=2) → GO TO J27CKPT 5. All Others
J14. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

[REFERENCE PERSON/SP LOOP: (Now) I’d like to ask about [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s] family history. / 1st OFUM LOOP: 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 you / has [REFERENCE PERSON] / has [SPOUSE-PARTNER] / has [OFUM] been married?

1

2 – 97

GO TO J21MO

GO TO J15MO

(WEB) Next are questions about [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s / [OFUM]’s] family history. Altogether, how many times [have you / has [REFERENCE PERSON] / has [SPOUSE-PARTNER] / has [OFUM] been married?

1

NA

2 – 97 Times

GO TO J21MO

GO TO J15MO

CHECK: Please enter a number from 1 to 97.

J15MO, J15YR. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

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?


The month entered is: [J15MO]

- ENTER the year below

1901 – [CYEAR] 0 9996. [P2YEAR]-[CYEAR] but don’t know which year (SP_0B)
0 9997. Before [P2YEAR] but don’t know exact year (SP_0A)

(WEB) In what month and year did [you / he / she] get married for the first time?

If you do not know the month, please select the season.


1901 – [CYEAR] Year

0 9996. [P2YEAR]-[CYEAR] but don’t know which year (SP_0B)
0 9997. Before [P2YEAR] but don’t know exact year (SP_0A)

CHECK: Please enter a date before today.

J16. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

What was [your / his / her] first spouse’s name?

- ACCEPT any name-do not probe

String 25

(WEB) What was [your / his / her] first spouse’s name?

If you prefer not to enter this person’s name, please enter a nickname or anything that will identify this person to you.

Name String 25
J17. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
Did that marriage end in widowhood, divorce, or what?

<p>| | | |</p>
<table>
<thead>
<tr>
<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>
</tr>
</tbody>
</table>

GO TO J18MO GO TO J19MO GO TO J21MO

(WEB) Did that marriage end in ...?

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>3. Widowhood</td>
<td>4. Divorce or annulment</td>
<td>7. Other - Please specify: (J17SPEC) NA</td>
</tr>
</tbody>
</table>

GO TO J18MO GO TO J19MO GO TO J21MO

J18MO, J18YR. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
In what month and year [were you / was he / was she] widowed?
- SELECT Month and [Enter] to go to next screen for year
- IF NECESSARY: What would be your best estimate?


The month entered is: [J18MO]
- ENTER the year below

1901 — [CYEAR] 0 9996. [P2YEAR]-[CYEAR] but don’t know which year (SP_0B)
0 9997. Before [P2YEAR] but don’t know exact year (SP_0A)

GO TO J21MO

(WEB) In what month and year [were you / was he / was she] widowed?
If you do not know the month, please select the season.


1901 — [CYEAR] 0 9996. [P2YEAR]-[CYEAR] but don’t know which year (SP_0B)
0 9997. Before [P2YEAR] but don’t know exact year (SP_0A)

GO TO J21MO

CHECK: Please enter a date before today.
CHECK: Please enter a date after the date of the marriage [J15].
J19MO, J19YR. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

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?

Select ▼


The month entered is: [J19MO]
- ENTER the year below

1901 – [CYEAR] o 9996. [P2YEAR]-[CYEAR] but don’t know which year (SP_0B)

O 9997. Before [P2YEAR] but don’t know exact year (SP_0A)

WEB) In what month and year did [your / his / her] divorce or annulment become final? If you do not know the month, please select the season.

Select ▼

Month or Season

1901 – [CYEAR] Year

O 9996. [P2YEAR]-[CYEAR] but don’t know which year (SP_0B)

O 9997. Before [P2YEAR] but don’t know exact year (SP_0A)

CHECK: Please enter a date before today.

CHECK: Please enter a date after the date of the marriage [J15].

J20MO, J20YR. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

In what month and year did you stop living together?

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

Select ▼


The month entered is: [J20MO]
- ENTER the year below

1901 – [CYEAR] o 9996. [P2YEAR]-[CYEAR] but don’t know which year (SP_0B)

O 9997. Before [P2YEAR] but don’t know exact year (SP_0A)

WEB) In what month and year did [you / they] stop living together? If you do not know the month, please select the season.

Select ▼

Month or Season

1901 – [CYEAR] Year

O 9996. [P2YEAR]-[CYEAR] but don’t know which year (SP_0B)

O 9997. Before [P2YEAR] but don’t know exact year (SP_0A)

CHECK: Please enter a date before today.

CHECK: Please enter a date after the date of the marriage [J15].
J21MO, J21YR. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

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?


The month entered is: [J21MO]
- ENTER the year below

1901 – [CYEAR] o 9996. [P2YEAR]-[CYEAR] but don’t know which year (SP_08)

o 9997. Before [P2YEAR] but don’t know exact year (SP_0A)

(WEB) In what month and year did [you / he / she] last get married?
If you do not know the month, please select the season.

Select 月 or Season

1901 – [CYEAR] Year

o 9996. [P2YEAR]-[CYEAR] but don’t know which year (SP_08)

o 9997. Before [P2YEAR] but don’t know exact year (SP_0A)

CHECK: Please enter a date before today.
CHECK: IF J14>1: Please enter a date after the date of the first marriage [J15].

J22. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

What (was / is) [your / his / her] spouse’s name?
- ACCEPT any name-do not probe

String 25

(WEB) What [MARITAL=WID, DIV: was / MARITAL=SEP, MARR: is] [your / his / her] spouse’s name?
If you prefer not to enter this person’s name, please enter a nickname or anything that will identify this person to you.

Name String 25

J23CKPT. CAI Checkpoint: Marital Status

1. Widowed (Marital=3) 2. Separated (Marital=5); or Married Partner (Marital=1) 3. Divorced (Marital=4) 4. Married Reference Person, Spouse, OFUM (Marital=1)

GO TO J26MO GO TO J25MO GO TO J27CKPT
In what month and year [were you / was he / was she] widowed?

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

Select


The month entered is: [J24MO]

- ENTER the year below

1901 – [CYEAR]

○ 9996. [P2YEAR]-[CYEAR] but don’t know which year (SP_0B)
○ 9997. Before [P2YEAR] but don’t know exact year (SP_0A)

GO TO J27CKPT

(WEB) In what month and year [were you / was he / was she] widowed?

If you do not know the month, please select the season.

Select

Month or Season


1901 – [CYEAR]

○ 9996. [P2YEAR]-[CYEAR] but don’t know which year (SP_0B)
○ 9997. Before [P2YEAR] but don’t know exact year (SP_0A)

GO TO J27CKPT

CHECK: Please enter a date before today.
CHECK: Please enter a date after the date of the marriage [J21].
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?

<table>
<thead>
<tr>
<th>Select</th>
<th>January</th>
<th>May</th>
<th>September</th>
<th>Winter (Dec-Feb)</th>
</tr>
</thead>
</table>

The month entered is: [J25MO]
- ENTER the year below

<table>
<thead>
<tr>
<th>1901 – [CYEAR]</th>
<th>Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 9996. [P2YEAR]-[CYEAR] but don’t know which year (SP_0B)</td>
<td></td>
</tr>
<tr>
<td>0 9997. Before [P2YEAR] but don’t know exact year (SP_0A)</td>
<td></td>
</tr>
</tbody>
</table>

CHECK: Please enter a date before today.
CHECK: Please enter a date after the date of the marriage [J21].

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?

<table>
<thead>
<tr>
<th>Select</th>
<th>January</th>
<th>May</th>
<th>September</th>
<th>Winter (Dec-Feb)</th>
</tr>
</thead>
</table>

The month entered is: [J26MO]
- ENTER the year below

<table>
<thead>
<tr>
<th>1901 – [CYEAR]</th>
<th>Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 9996. [P2YEAR]-[CYEAR] but don’t know which year (SP_0B)</td>
<td></td>
</tr>
<tr>
<td>0 9997. Before [P2YEAR] but don’t know exact year (SP_0A)</td>
<td></td>
</tr>
</tbody>
</table>

CHECK: Please enter a date before today.
CHECK: Please enter a date after the date of the marriage [J21].
### Biological Children

**J27CKPT. CAI Checkpoint: J1CKPT Type**

<table>
<thead>
<tr>
<th>Type</th>
<th>J1CKPT Values</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Type A</td>
<td>J1CKPT=1</td>
<td>GO TO J30</td>
</tr>
<tr>
<td>2. Type B</td>
<td>J1CKPT=3, 4</td>
<td></td>
</tr>
<tr>
<td>3. Type C1A-D, Type C2A-D</td>
<td>J1CKPT=6, 7, 9, 11, 12, 14</td>
<td>GO TO J30</td>
</tr>
<tr>
<td>4. Type C1E</td>
<td>J1CKPT=16</td>
<td></td>
</tr>
</tbody>
</table>

**J28. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]**

We are updating the information we collected in [P2YEAR].

**TYPEA:** Have [you and [REFERENCE PERSON]'s / [SPOUSE-PARTNER] / [REFERENCE PERSON] and [SPOUSE-PARTNER]] had any children since [IWTYPE=REINT & PYIWDATE=RESPONSE: our last interview on [PYIWDATE] / ALL OTHERS: January [P2YEAR]]?

**TYPEB, TYPEC1E:** [CNTOTHKIDS>0: Including [your / his / her] [child / children] ([CNTOTHKIDS]) we already spoke about, [have you / has [REFERENCE PERSON] / has [SPOUSE-PARTNER] / has [OFUM]] / ALL OTHERS: [Have you / Has [REFERENCE PERSON]’s / Has [SPOUSE-PARTNER] / Has [OFUM]]] [J2=MALE: fathered / J2=FEMALE: given birth to] any children since [IWTYPE=REINT & PYIWDATE=RESPONSE: our last interview on [PYIWDATE] / ALL OTHERS: January [P2YEAR]]?

- DO NOT count stillbirths, stepchildren, or adopted children
- [CYFUHU=FUMI, FU and AGEIWDATE<=17: Child(ren) in the FU: [CYNAMF] [CYNAML], Birthdate [CYMOBRN/CYDAYBRN/CYYRBRN], Age [AGEIWDATE], [CYAQRTH], [CYFUHU]]

1. Yes
5. No
GO TO OS64CKPT

**GO TO J29**

**WEB** These next questions will help us update the information we collected in [P2YEAR].

**TYPEA:** Have [you and [REFERENCE PERSON] / [SPOUSE-PARTNER] / [REFERENCE PERSON] and [SPOUSE-PARTNER]] had any children since [IWTYPE=REINT & PYIWDATE=RESPONSE: our last interview on [PYIWDATE] / ALL OTHERS: January [P2YEAR]]?

**TYPEB, TYPEC1E:** [CNTOTHKIDS>0: Including [your / his / her] [child / children] ([CNTOTHKIDS]) children already reported, [have you / has [REFERENCE PERSON]’s / has [SPOUSE-PARTNER] / has [OFUM]] / ALL OTHERS: [Have you / Has [REFERENCE PERSON] / Has [SPOUSE-PARTNER] / Has [OFUM]]] [J2=MALE: fathered / J2=FEMALE: given birth to] any children since [IWTYPE=REINT & PYIWDATE=RESPONSE: our last interview on [PYIWDATE] / ALL OTHERS: January [P2YEAR]]?

Please do not include stillbirths, stepchildren, or adopted children. We will ask about stepchildren and adopted children later.

[CYFUHU=FUMI, FU and CYYrBrn=P2YEAR-CYEAR: If you are the parent of ^CYNAMF ^CYNAML please select “Yes”].

1. Yes
5. No
GO TO OS64CKPT

**GO TO J29**

**SIGNAL for NA:** This information is important. Please select a response.
J29. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

How many is that? (Since [our last interview on [PYIWDATE] / January [P2YEAR]]?)

- [CNTOTHKIDS>0: If needed: Including [your / his /her] [child / children] ([CNTOTHKIDS]) we already spoke about]
- [CYFUHU=FUMI, FU and AGEIWDATE<=17: Child(ren) in the FU: [CYNAMF] [CYNAML], Birthdate [CYMOBRN/CYDAYBRN/CYYRBRN], Age [AGEIWDATE], [CYAQRTH], [CYFUHU]]

1 – 97 → GO TO OTHKID RULE

WEB) How many children is that, since [IWTYPE=REINT & PYIWDATE=RESPONSE: [PYIWDATE] / IWTYPE=SO; or IWTYPE=REINT & PYIWDATE=DK, RF, NA: January [P2YEAR]]?

Please do not include stillbirths, stepchildren, or adopted children. We will ask about stepchildren and adopted children later.

1 – 97 Children → GO TO OTHKID RULE

SIGNAL for NA: This information is important. Please give us your best estimate.

CHECK for J29<CNTOTHKIDS: The number of children reported is less than the number of children for whom [CYNAMF] has already been selected as a parent. GO BACK and confirm.

J30. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

[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 you / has [REFERENCE PERSON] / has [SPOUSE-PARTNER] / has [OFUM]] [J2=MALE: ever fathered / J2=FEMALE: [yourself] ever given birth to]?
- DO NOT count stillbirths, stepchildren, or adopted children
- [CYFUHU=FUMI, FU and AGEIWDATE<=17: Child(ren) in the FU: [CYNAMF] [CYNAML], Birthdate [CYMOBRN/CYDAYBRN/CYYRBRN], Age [AGEIWDATE], [CYAQRTH], [CYFUHU]]

0 DK/RF 1 – 97 → GO TO OTHKID RULE

WEB) [CNTOTHKIDS>0: Including [your / his / her] [child / [CNTOTHKIDS] children] already reported, how / ALL OTHERS: How] many children [have you / has [REFERENCE PERSON] / has [SPOUSE-PARTNER] / has [OFUM]] [J2=MALE: ever fathered / J2=FEMALE: [yourself] ever given birth to]?

Please do not include stillbirths, stepchildren, or adopted children. We will ask about stepchildren and adopted children later.

0 NA 1 – 97 Children → GO TO OTHKID RULE

SIGNAL for NA: This information is important. Please give us your best estimate.

CHECK for J30<CNTOTHKIDS: Please enter a number [CNTOTHKIDS] or greater, including the [CNTOTHKIDS] child(ren) already reported for this person.
SECTION_J[1..24].OTHKIDTABLE.OTHKIDBLOCK[1..10] [1..24]=AQSN of FU Member; [1..10]=Which child previously reported

OTHKID RULE: J1CKPT Type; CNTOTHKIDS=#Children for Whom This Person Previously Reported as Other Birth Parent

<table>
<thead>
<tr>
<th>Type A (J1CKPT=1)</th>
<th>Type B (J1CKPT=3, 4) or Type C (J1CKPT=6, 7, 11, 12, 9, 14, 16)</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO J31 RULE</td>
<td>Not Previously Reported as Other Parent (CNTOTHKIDS=0)</td>
</tr>
<tr>
<td></td>
<td>Previously Reported as Other Parent (CNTOTHKIDS&gt;0)</td>
</tr>
<tr>
<td></td>
<td>GO TO J31 RULE</td>
</tr>
</tbody>
</table>

OTHKID. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
IWER: VERIFY each child already reported for [CYNAMF]: Before we go on, I’d like to confirm [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s / [OFUM]’s] [CNTOTHKIDS=1: child / CNTOTHKIDS>1: children] we already spoke about:
([First / Next] how about...) [J31] ([J31NAML])? ([J31] was reported as [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s / [OFUM]’s] child, is that right?)
- ENTER [1] if Child verified as ([REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s / [OFUM]’s) child
[CHILD NAME] [DOB] [Other Parent Name]

1. Yes  5. No

CHECK for OTHKID<>YES: Please verify! (Returns IWER to OTHPARENT in the J LOOP where this person was originally selected as the other birth parent of Child. If this person is unselected as the other birth parent of Child in that J LOOP (OTHPARENT), then CNTOTHKIDS is reduced by one (1), J29_J30COUNT is recalculated, and Child info is removed from OTHKIDTABLE.
(WEB) [J31] ([J31NAML]) was reported as [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s / [OFUM]’s] child, is that correct?

1. Yes  5. No

OTHKID END RULE: Whether This Person Selected as Other Birth Parent for More Children

More Children  → REPEAT OTHKID; Max=10;  No More Children  ↓
Then GO TO J31 RULE

End OTHKIDBLOCK

SECTION_J[1..24].J31NAME[1..20] [1..24]=AQSN of FU Member; [1..20]=Which child NOT previously reported

J31 RULE: #Other Children (J29_J30COUNT; J29_J30COUNT=[J29 /J30] minus CNTOTHKIDS)

One or More (J29_J30COUNT>0)  None (J29_J30COUNT=0)  → GO TO J32CKPT
J31, J31NAMM, J31NAML. (CATI) CHILD OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

[LOOP 1: Now let’s talk about [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s / [OFUM]’s] [CNTOTHKIDS>0: other] [J29, J30, or J29_J30COUNT=1: child / J29, J30, or J29_J30COUNT>1: children]. What is [J29, J30, or J29_J30COUNT=1: this / J29, J30, or J29_J30COUNT>1: the [first / next]] child’s name, including middle and last names? / LOOP 2-20: (Now let’s talk about [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s / [OFUM]’s] [CNTOTHKIDS>0: other] [J29, J30, or J29_J30COUNT=1: child / J29, J30, or J29_J30COUNT>1: children].) What is [J29, J30, or J29_J30COUNT=1: this / J29, J30, or J29_J30COUNT>1: the [first / next]] child’s name, including middle and last names?]

- VERIFY or ASK First Name
- Ctrl-D and Ctrl-R not allowed; For DK/RF, type [DK] or [RF]
- [CYFUHU=FUMI, FU and AGEIWDATE<=17: Child(ren) in the FU: [CYNAMF] [CYNAML], Birthdate [CYMOBRN/CYDAYBRN/CYYRBRN], Age [AGEIWDATE], [CYAQRTH], [CYFUHU]]

String 25
(What is [this / the [first / next]] child’s name, including middle and last names?)

- VERIFY or ASK Middle Name
- Ask for Middle Name but do not probe DK or RF
- If none, PRESS [Enter] to continue
- Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue
- [CYFUHU=FUMI, FU and AGEIWDATE<=17: Child(ren) in the FU: [CYNAMF] [CYNAML], Birthdate [CYMOBRN/CYDAYBRN/CYYRBRN], Age [AGEIWDATE], [CYAQRTH], [CYFUHU]]

String 25
(What is [this / the [first / next]] child’s name, including middle and last names?)

- VERIFY or ASK Last Name
- Ctrl-D and Ctrl-R not allowed; For DK/RF, type [DK] or [RF]
- [CYFUHU=FUMI, FU and AGEIWDATE<=17: Child(ren) in the FU: [CYNAMF] [CYNAML], Birthdate [CYMOBRN/CYDAYBRN/CYYRBRN], Age [AGEIWDATE], [CYAQRTH], [CYFUHU]]

String 25
(WEB) [LOOP 1 & CNTOTHKIDS>0: You’ve already told us about [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s / [OFUM]’s] [OTHKIDTABLE.KIDSCOUNT=1: child [CHILD NAME] / OTHKIDTABLE.KIDSCOUNT>1: children [CHILDREN NAMES].] These next questions are about [your / [REFERENCE PERSON]’s / [SPOUSE-PARTNER]’s / [OFUM]’s] [CNTOTHKIDS>0: other] [J29_J30COUNT=1: child / J29_J30COUNT>1: children].] What is [J29_J30COUNT=1: this / J29_J30COUNT>1: the [first / next]] child’s name?

If you prefer not to enter this child’s name, please enter a nickname or anything that will identify this child to you.

First Name | String 25
Middle Name | String 25
Last Name | String 25

OTHPARENTCKPT. CAI Checkpoint: J1CKPT Type

1. Type A (J1CKPT=1) → GO TO DADAQSN
5. Type B (J1CKPT=3, 4) or Type C (J1CKPT=6, 7, 11, 12, 9, 14, 16)
<table>
<thead>
<tr>
<th>Age Range</th>
<th>Description</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1–24</td>
<td>[CYNAMF] [CYNAML] (Age: [AGEIWDATE]) AQN list of living, opposite gender FU members age 12+</td>
<td>(Assign DADAQSN/MOMAQSN) GO TO OS1 RULE</td>
</tr>
<tr>
<td>31–50</td>
<td>[PREVIOUS OTHPPARENTNAMF/L] (Other birth parent of [[PREVIOUS J31] / the [first ... twentieth] child]) List of OTHPARENT=97 for previous children</td>
<td>(Assign DADAQSN/MOMAQSN) GO TO OTHPARENTNAMF</td>
</tr>
<tr>
<td>51–60</td>
<td>Name unknown (Other birth parent of [[PREVIOUS J31] / the [first ... twentieth] child]) List of OTHPARENT=96 for previous children</td>
<td>(Assign DADAQSN/MOMAQSN) GO TO OTHPARENTNAMF</td>
</tr>
<tr>
<td>61–70</td>
<td>Donated sperm/egg or surrogate of [[PREVIOUS J31] / the [first ... twentieth] child] List of OTHPARENT=95 for previous children</td>
<td>(Assign DADAQSN/MOMAQSN) GO TO OTHPARENTNAMF</td>
</tr>
<tr>
<td>95</td>
<td>Donated sperm/egg or surrogate</td>
<td>(Assign DADAQSN/MOMAQSN)</td>
</tr>
<tr>
<td>96</td>
<td>Other person - Name unknown or prefer not to provide name (Specify name)</td>
<td>(Assign DADAQSN/MOMAQSN)</td>
</tr>
</tbody>
</table>
SECTION_J[1..24].J31NAME[1..20].PARENTNOTINFU [1..24]=AQSNS of FU Member; [1..20]=Which child

OTHPARENTNAMF, OTHPARENTNAML. (CATI) OTHER BIRTH PARENT OF: [J31 NAME] (Child of [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]])
What is [her / his] name (first and last names)?
- ENTER Birth [Mother’s / Father’s] First Name
- ENTER names only; do not ENTER [DK, RF, UNKNOWN, etc.]
- If R cannot or will not report parent’s name, GO BACK and ENTER [96] at OTHPARENT (other birth parent)

String 25

(What is [her / his] name (first and last names)?)
- ENTER Birth [Mother’s / Father’s] Last Name
- ENTER names only; do not ENTER [DK, RF, UNKNOWN, etc.]
- If R cannot or will not report parent’s name, GO BACK and ENTER [96] at OTHPARENT (other birth parent)

String 25

(WEB) What is [J2=MALE: her / J2=MALE: his] name?
If you prefer not to enter this person’s name, please enter a nickname or anything that will identify this person to you.
First Name String 25
Last Name String 25

End PARENTNOTINFU

DADAQSN. AQSNS of Child’s Birth Father; J2; or 1-24 if OTHPARENT=1-24; or null if OTHPARENT=31-97, DK, RF, NA. Assigned.
MOMAQSN. AQSNS of Child’s Birth Mother; J2; or 1-24 if OTHPARENT=1-24; or null if OTHPARENT=31-97, DK, RF, NA. Assigned.

OS1 RULE: Whether More Children at J29 or J30

More Children \(\rightarrow\) REPEAT J31 - MOMAQSN; Max=20; No More Children
Then GO TO OS1

End J31NAME

SECTION_J[1..24].OS1_OS9[1..20] [1..24]=AQSNS of FU Member; [1..20]=Which child

OS1. (CATI) [J31 NAME] CHILD OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
(Now) Let’s talk about [J31] [J31NAML]. (We can’t always tell from a name. Is that a male or a female?)

1. Male 2. Female

(WEB) \[J29_J30COUNT>1: These next questions are about [[J31] [J31NAML] / the [first / next] child.
Is [[J31] [[J31NAML]] / this child] ...?

1. Male 2. Female
What is [CHILD]'s full birthdate?

- SELECT Month
- IF NECESSARY: What would be your best estimate?
- IF needed: Please remember that all of your responses are confidential.

Select

1. January
2. February
3. March
4. April
5. May
6. June
7. July
8. August
9. September
10. October
11. November
12. December
21. Winter (Dec-Feb)
22. Spring (Mar-May)
23. Summer (Jun-Aug)
24. Fall (Sep-Nov)

The month entered is: [OS2MO]

- ENTER day
- IF needed: Please remember that all of your responses are confidential.

Select

1 – 31

The month entered is: [OS2MO]

- ENTER the year below
- IF needed: Please remember that all of your responses are confidential.

1901 – [CYEAR]

- 9996. [P2YEAR] - [CYEAR] but don’t know which year (SP_08)
- 9997. Before [P2YEAR] but don’t know exact year (SP_0A)

SIGNAL for J28=YES & OS2YR<P2YEAR or 9997: Years prior to [P2YEAR] are not allowed since we are asking about children born since [PYIWDATE]. Please VERIFY child’s year of birth.

(WEB) What is [[J31]'s ([J31NAML]) / this child’s] birthdate?
Please remember that all of your responses are confidential.

Select

Month or Season

1. January
2. February
3. March
4. April
5. May
6. June
7. July
8. August
9. September
10. October
11. November
12. December
21. Winter (Dec-Feb)
22. Spring (Mar-May)
23. Summer (Jun-Aug)
24. Fall (Sep-Nov)

Select

Day

1 – 31

1901 – [CYEAR]

- 9996. [P2YEAR] - [CYEAR] but don’t know which year (SP_08)
- 9997. Before [P2YEAR] but don’t know exact year (SP_0A)

CHECK: Please enter a date before today.

CHECK for J1CKPT=TYPE A, B, C1E & OS2YR<P2YEAR: Please enter a year from [P2YEAR] to [CYEAR].

OS2 END RULE: Whether Child Born Before P2YEAR or in P2YEAR or Later

<table>
<thead>
<tr>
<th>Born Before P2YEAR (OS2YR &lt; P2YEAR or 9997)</th>
<th>Born in P2YEAR or Later (OS2YR=P2YEAR-CYEAR or 9996)</th>
<th>All Others (OS2YR=DK, RF, NA)</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO OS4TOWN</td>
<td></td>
<td>GO TO OS4TOWN</td>
</tr>
</tbody>
</table>
OS3LBS, OS3OZ. (CATI) [J31 NAME] CHILD OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] ([Respondent])

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 – 97  DK/RF → GO TO OS3A

↓

- The weight in pounds entered is: [OS3LBS]
- ENTER the OUNCES

0 – 15 → GO TO OS10A

OS3KILO. (CATI) [J31 NAME] CHILD OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] ([Respondent])

(How much did [he / she] weigh at birth?)

- ENTER weight in KILOGRAMS

0.0 – 7.0 → GO TO OS10A  DK/RF → GO TO OS3A

(WEB) How much did [[J31] ([J31NAML]) / this child] weigh at birth?

OS3LBS, OS3OZ. Default

To enter kilograms instead, click here.

0 – 97  Pounds  0 – 15  Ounces  NA → GO TO OS3A

CHECK: Please enter a number from 0 to 97.

CHECK: Please enter a number from 0 to 15.

GO TO OS10A

OS3KILO. Alternate

To enter pounds and ounces instead, click here.

0.0 – 7.0  Kilograms  NA → GO TO OS3A

CHECK: Please enter a number from 0.0 to 7.0.

GO TO OS10A

OS3A. (CATI) [J31 NAME] CHILD OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] ([Respondent])

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  DK/RF

GO TO OS3B  GO TO OS3B  GO TO OS3B

(WEB) Did [[J31] ([J31NAML]) / this child] weigh ...?

1. More than 5-1/2 pounds (2500 grams)  2. Less than 5-1/2 pounds (2500 grams)  3. About 5-1/2 pounds (2500 grams)  NA

GO TO OS3B  GO TO OS3B  GO TO OS10A
OS3B. *(CATI)* [J31 NAME] CHILD OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[(Respondent)]
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

*(WEB)* Was that ...?

1. More than 9 pounds
2. Less than 9 pounds
3. About 9 pounds

OS10A. *(CATI)* [J31 NAME] CHILD OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[(Respondent)]
What was [his / her] length at birth?

- ENTER length in INCHES
- Or PRESS [Enter] to go to next screen for centimeters

[ENTER] 0 – 97 → GO TO OS10B  DK/RF → GO TO OS10C

GO TO OS10CENT

CHECK: Please enter a number from 6 to 30.

OS10CENT. *(CATI)* [J31 NAME] CHILD OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[(Respondent)]
(What was [his / her] length at birth?)

- ENTER length in CENTIMETERS

0.0 – 97.0 DK/RF → GO TO OS10C

GO TO OS10B

CHECK: Please enter a number from 15.2 to 76.2.

*(WEB)* What was [[J31]’s ([J31NAML]) / this child’s] length at birth?

OS10A. Default

To enter centimeters instead, click here.

0 – 97 Inches NA → GO TO OS10C

CHECK: Please enter a number from 6 to 30.

OS10CENT. Alternate

To enter inches instead, click here.

0.0 – 97.0 Centimeters NA → GO TO OS10C

CHECK: Please enter a number from 15.2 to 76.2.

GO TO OS10B

OS10B. *(CATI)* [J31 NAME] CHILD OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[(Respondent)]
INTERVIEWER: Did R indicate that the length of the baby was an estimate?

1. Yes 5. No

*(WEB)* Is that (((OS10A] inches / [OS10CENT] centimeters)) an estimate?

1. Yes 5. No
Birth Year=P2Year-CYear

OS10C. (CATI) [J31 NAME] CHILD OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
• 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

(WEB) Did [you / [MOTHER]] [MOMAQS=RESPAQS: you / OTHPARENT=1-24: [CYNAME] / OTHPARENT=31-50, 97: [OTHPARENTNAME] / OTHPARENT=51-70, 95, 96, DK, RF, NA: [J31]’s ([J31NAML]) / this child’s] mother] breastfeed [J31] ([J31NAML]) / this child] at all or is she still breastfeeding? Please include any amount of breastfeeding no matter how small, and breastmilk that is expressed or pumped.
1. Yes 5. No

OS4COUNTRY (OS4CTRYNAME), OS4TOWN, OS4STATE (OS4STABBR).
(CATI) [J31 NAME] CHILD OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
Where was [he / she] ([J31] [J31NAML]) born? (In what country was [he / she] born?)
• ENTER [185 UNITED STATES] for Puerto Rico, U.S. Virgin Islands, Guam, American Samoa or the Northern Mariana Islands
Select 1 – 193 (Defaults to 185/US)
In what city was [he / she] ([J31] [J31NAML]) born?
• For Don’t Know, ENTER [Ctrl D]
• For Refusal, ENTER [Ctrl R]
String 25
(In what state (of the U.S.) was that?) (For COUNTRY=185)
Select 1 – 57 (Assigned 57/FC if Country<>185)
(WEB) Where was [J31] ([J31NAML]) / this child] born?
Country
United States includes Puerto Rico, U.S. Virgin Islands, Guam, American Samoa and the Northern Mariana Islands
Select 1 – 193 (Defaults to 185/US)
City
Select String 25
State
Select 1 – 57 (Assigned 57/FC if Country<>185)
OS5. *(CATI ONLY)* [(J31 NAME)] CHILD OF: [(CYNAMF) [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

Is [J31] [(J31NAML)] living with [you / [REFERENCE PERSON] / [SPouse-PARTNER] / [OFUM]] now, away with [his / her] [(J2=Female: father / J2=Male: 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?

<table>
<thead>
<tr>
<th>Option</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Living in FU now</td>
<td></td>
</tr>
<tr>
<td>2. Living with father elsewhere</td>
<td></td>
</tr>
<tr>
<td>3. Living with mother elsewhere</td>
<td></td>
</tr>
<tr>
<td>4. Living with other relative elsewhere</td>
<td></td>
</tr>
<tr>
<td>5. Set up a separate household</td>
<td></td>
</tr>
<tr>
<td>6. Deceased</td>
<td></td>
</tr>
<tr>
<td>7. Other-specify (OS5SSPEC. Specify (String 100))</td>
<td></td>
</tr>
<tr>
<td>8. Adopted out to relative</td>
<td></td>
</tr>
<tr>
<td>9. Adopted out to non-relative</td>
<td></td>
</tr>
<tr>
<td>10. Adopted out; don’t know/refused to whom</td>
<td></td>
</tr>
</tbody>
</table>

GO TO OS7

OS5A_W. *(WEB ONLY)* Where is [(J31) [(J31NAML)] / this child] now?

<table>
<thead>
<tr>
<th>Option</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Living here with this family 1</td>
<td></td>
</tr>
<tr>
<td>2. Living somewhere else</td>
<td></td>
</tr>
<tr>
<td>3. Adopted</td>
<td></td>
</tr>
<tr>
<td>4. Passed away; died</td>
<td></td>
</tr>
<tr>
<td>7. Other - Please specify: (OS5ASPEC)</td>
<td></td>
</tr>
<tr>
<td>NA</td>
<td></td>
</tr>
</tbody>
</table>

GO TO OS7

OS5B_W. *(WEB ONLY)* With whom is [(J31) [(J31NAML)] / this child] living?

<table>
<thead>
<tr>
<th>Option</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. [His / Her / Their] father</td>
<td></td>
</tr>
<tr>
<td>2. [His / Her / Their] mother</td>
<td></td>
</tr>
<tr>
<td>3. Another relative</td>
<td></td>
</tr>
<tr>
<td>4. On [his / her / their] own, in a separate household</td>
<td></td>
</tr>
<tr>
<td>5. A foster family</td>
<td></td>
</tr>
<tr>
<td>7. Other - Please specify: (OS5BSPEC) 7</td>
<td></td>
</tr>
</tbody>
</table>

GO TO OS7

OS5C_W. *(WEB ONLY)* By whom was [(J31) [(J31NAML)] / this child] adopted?

<table>
<thead>
<tr>
<th>Option</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. A relative</td>
<td></td>
</tr>
<tr>
<td>2. A non-relative</td>
<td></td>
</tr>
<tr>
<td>3. Don’t know or would rather not say</td>
<td></td>
</tr>
<tr>
<td>7. Other - Please specify: (OS5CSPEC)</td>
<td></td>
</tr>
</tbody>
</table>

GO TO OS7
OS6MO, OS6YR. *(CATI)* [J31 NAME] CHILD OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

We are very sorry for your loss. 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?

Select  
1. January  
2. February  
3. March  
4. April  
5. May  
6. June  
7. July  
8. August  
9. September  
10. October  
11. November  
12. December  
21. Winter (Dec-Feb)  
22. Spring (Mar-May)  
23. Summer (Jun-Aug)  
24. Fall (Sep-Nov)

The month entered is: [OS6MO]

- ENTER the year below

1901 – [CYEAR]  
○ 9996. [P2YEAR]-[CYEAR] but don’t know which year (SP_0B)  
○ 9997. Before [P2YEAR] but don’t know exact year (SP_0A)

GO TO OS8 RULE

*(WEB)* We are very sorry for your loss.

In what month and year did [[J31] ([J31NAML]) / this child] die?

*If you do not know the month, please select the season.*

Select  
Month or Season  
1. January  
2. February  
3. March  
4. April  
5. May  
6. June  
7. July  
8. August  
9. September  
10. October  
11. November  
12. December  
21. Winter (Dec-Feb)  
22. Spring (Mar-May)  
23. Summer (Jun-Aug)  
24. Fall (Sep-Nov)

1901 – [CYEAR]  
○ 9996. [P2YEAR]-[CYEAR] but don’t know which year (SP_0B)  
○ 9997. Before [P2YEAR] but don’t know exact year (SP_0A)

GO TO OS8 RULE

CHECK: Please enter a date before today.

OS7. *(CATI)* [J31 NAME] CHILD OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

Is [he / she] Spanish, Hispanic, or Latino? That is, Mexican, Mexican American, Chicano, Puerto Rican, Cuban, or other Spanish?

0. Is not Spanish/Hispanic  
1. Mexican  
2. Mexican American  
3. Chicano  
4. Puerto Rican  
5. Cuban  
7. Other-specify (OS7SPEC. Specify (String 100))

*(WEB)* What are [CHILD]’s Hispanic, Latino or Spanish origins or background?

0. None, not Spanish, Hispanic, or Latino  
1. Mexican  
2. Mexican American  
3. Chicano  
4. Puerto Rican  
5. Cuban  
7. Other - Please specify: (OS7SPEC)
OS8. (CATI) [J31 NAME] CHILD OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

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?

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>5. Native Hawaiian</td>
<td>6. Pacific Islander</td>
<td>7. Other-specify (OS8SPEC. Specify (String 100))</td>
<td>DK/RF</td>
</tr>
</tbody>
</table>

WEB What is [CHILD]’s race?
Please select all that apply.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>5. Native Hawaiian</td>
<td>6. Pacific Islander</td>
<td>7. Other - Please specify: (OS8SPEC)</td>
<td>NA</td>
</tr>
</tbody>
</table>

OS8A. (CATI) [J31 NAME] CHILD OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

Would that be Chinese, Filipino, Asian Indian, or what?

7. Other-specify (OS8ASPEC. Specify (String 100))

WEB What are [CHILD]’s specific Asian origins or background?

7. Other - Please specify: (OS8ASPEC)

OS8 RULE: Whether More Children at J29 or J30

More Children \(\rightarrow\) REPEAT OS1 - OS8ASPEC; Max=20; No More Children
Then GO TO OS10CKPT

OS10CKPT. CAI Checkpoint: Child Qualifier - Whether Newborn & Not Adopted Out

1. Newborn, Not Adopted Out
(OS5=1-5, 7, 11 or OS5A_W=1, 7 or OS5B_W=1-7) & ((IWTPE=REINT & OS2>PYIWDATE or OS2YR=P2YR-CYR or 9996) or (IWTYPE<>REINT & OS2YR=P2YR-CYR or 9996)))

5. All Others

Birth Year=P2Year-CYear and Not Adopted Out

OS71CKPT. CAI Checkpoint: Whether Multiple Newborns Not Adopted Out & Have Same Birthdate +/- 1 Day

Multiple Newborns, Not Adopted Out & Same Birthdate \(\rightarrow\) GO TO OS11CKPT

End OS1_OS9
Biological Newborn - Multiple Birth

SECTION_J[1..24].MULTIPLE[1..10] [1..24]=AQSN of FU Member; [1..10]=Which multiple birth

OS71. (CATI) Child [1-8]: [J31 NAME], DOB: [OS2BMO/OS2BDY/OS2BYR]

1. Yes 5. No → GO TO OS11CKPT

GO TO OS72


1. Yes 5. No → GO TO OS11CKPT

GO TO OS72

OS72. (CATI) Child [1-8]: [J31 NAME], DOB: [OS2BMO/OS2BDY/OS2BYR]
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 DK/RF → GO TO OS74

GO TO OS73

(WEB) Are they ...?


GO TO OS74

OS73. (CATI) Child [1-8]: [J31 NAME], DOB: [OS2BMO/OS2BDY/OS2BYR]
How do you know they are [identical / fraternal] [twins / triplets / quadruplets / quintuplets / sextuplets / septuplets / octuplets]?

- ENTER all that apply
- PROBE: Any others?

7. Completed a questionnaire 8. Someone else not present at delivery told me

OS72=FRATERNAL: 9. Newborns of different sex 97. Other-specify (OS73SPEC. Specify. (String 100))

(WEB) How do you know they are [identical / fraternal] [twins / triplets / quadruplets / quintuplets / sextuplets / septuplets / octuplets]?

Please select all that apply.

1. A cheek swab DNA test 2. A blood DNA test 3. A placental membrane DNA test
4. A blood typing test 5. By observation of the placenta 6. Informed by the doctor or midwife
7. Through a completed questionnaire 8. Informed by someone else not present at the delivery

OS72=FRATERNAL: 9. The newborns are different sexes 97. Other - Please specify: (OS73SPEC)
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

(WEBS) Are they ...?

1. Often mistaken for each other  2. Different enough to tell apart

End MULTIPLE

Biological Newborn

SECTION_J[1..24].NEWBORNNOTADP[1..10] {1..24}=AQSNOF FU Member; {1..10}=Which birth
OSAQSN. AQSNOF FU Member. Assigned.
DADAQSN. AQSNOF Child’s Birth Father. Assigned.
MOMAQSN. AQSNOF Child’s Birth Mother. Assigned.

OS11CKPT. CAI Checkpoint: Whether Newborn is Single or Multiple Birth

1. Single Birth; or 1st Newborn of Multiple Birth  5. Other Newborn of Multiple Birth → GO TO OS28CKPT

OS11_1CKPT. CAI Checkpoint: Whether R is Parent of Newborn

1. R=Parent (RESPAQSN=MOMAQSN or DADAQSN) → GO TO OS11  5. All Others

OS11_1. (CATI) [J31 NAME] etc [CHILD/CHILDREN] OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE]  [(Respondent)]

Next are some questions about [your / [MOTHER]’s / [J31]’s ([J31NAML]) [MULT BIRTH: and [J31]’s ([J31NAML]) etc] mother’s] pregnancy and the birth of [J31] ([J31NAML]) [MULT BIRTH: and [J31] ([J31NAML]) etc].

Would you be able to answer these questions?

1. Yes  5. No → GO TO OS64CKPT

GO TO OS11


Would you be able to answer these questions?

1. Yes  5. No → GO TO OS64CKPT

GO TO OS11
OS11. \textit{(CATI)} [J31 NAME] etc [CHILD/CHILDREN] OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

How many weeks pregnant [were / was] [you / [MOTHER] / [J31]’s ([J31NAML]) [MULT BIRTH: and [J31]’s ([J31NAML]) etc] mother] when [you / she] learned that [you were / she was] pregnant with [J31] ([J31NAML]) [MULT BIRTH: and [J31] ([J31NAML]) etc]?

- ENTER number of weeks
- Weeks of pregnancy should be counted as completed weeks since the last normal menstrual period.

\begin{center}
\begin{tabular}{|c|c|}
\hline
0 – 40 & DK/RF \\
\hline
\end{tabular}
\end{center}

GO TO OS13 \quad GO TO OS12

(WEB) How many weeks pregnant [were / was] [you / [MOTHER] / [J31]’s ([J31NAML]) [MULT BIRTH: and [J31]’s ([J31NAML]) etc] mother / the [twins / triplets / quadruplets / quintuplets / sextuplets / septuplets / octuplets] mother] when [you / she] learned that [you were / she was] pregnant with [[J31] ([J31NAML]) [MULT BIRTH: and [J31] ([J31NAML]) and etc] / this child / the [twins / triplets / quadruplets / quintuplets / sextuplets / septuplets / octuplets]]?

\textit{Weeks of pregnancy should be counted as completed weeks since the last normal menstrual period.}

\begin{center}
\begin{tabular}{|c|c|}
\hline
0 – 40 & NA \\
\hline
\end{tabular}
\end{center}

GO TO OS13 \quad GO TO OS12

CHECK: Please enter a number from 0 to 40.

OS12. \textit{(CATI)} [J31 NAME] etc [CHILD/CHILDREN] OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

Was it less than three months (12 weeks), more than three months (12 weeks), or what?

\begin{center}
\begin{tabular}{|c|c|c|c|}
\hline
1. Less than 3 months & 2. More than 3 months & 3. About 3 months & DK/RF \\
\hline
\end{tabular}
\end{center}

GO TO OS13 \quad GO TO OS12A \quad GO TO OS13

(WEB) Was it ...

\begin{center}
\begin{tabular}{|c|c|c|}
\hline
1. Less than 3 months (12 weeks) & 2. More than 3 months (12 weeks) & 3. About 3 months (12 weeks) & NA \\
\hline
\end{tabular}
\end{center}

GO TO OS13 \quad GO TO OS12A \quad GO TO OS13

OS12A. \textit{(CATI)} [J31 NAME] etc [CHILD/CHILDREN] OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

Was it less than six months (24 weeks), more than six months (24 weeks), or what?

\begin{center}
\begin{tabular}{|c|c|c|}
\hline
1. Less than 6 months & 2. More than 6 months & 3. About 6 months \\
\hline
\end{tabular}
\end{center}

(WEB) Was it ...

\begin{center}
\begin{tabular}{|c|c|c|}
\hline
1. Less than 6 months (24 weeks) & 2. More than 6 months (24 weeks) & 3. About 6 months (24 weeks) \\
\hline
\end{tabular}
\end{center}
OS13. (CATI) [J31 NAME] etc [CHILD/CHILDREN] OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

In the 6 months before [you / [MOTHER] / [J31]’s ([J31NAML]) [MULT BIRTH: and [J31]’s ([J31NAML]) etc] mother] found out [you were / she was] pregnant (with [J31] ([J31NAML]) [MULT BIRTH: and [J31] ([J31NAML]) etc]), how many cigarettes did [you / she] smoke a day, on average?

- DEFINITION: A standard pack of cigarettes contains 20 cigarettes

| 0 | DK/RF | 1 – 997 |

GO TO OS16 GO TO OS14

(WEB) In the 6 months before [you / [MOTHER] / [J31]’s ([J31NAML]) [MULT BIRTH: and [J31]’s ([J31NAML]) etc] mother / the [twins / triplets / quadruplets / quintuplets / sextuplets / septuplets / octuplets] mother] found out [you were / she was] pregnant (with [J31] ([J31NAML]) [MULT BIRTH: and [J31] ([J31NAML]) and etc] / this child / the [twins / triplets / quadruplets / quintuplets / sextuplets / septuplets / octuplets]), how many cigarettes did [you / she] smoke a day, on average?

A standard pack of cigarettes contains 20 cigarettes.

| 0 | NA | 1 – 997 |

Cigarettes

GO TO OS16 GO TO OS14

CHECK: Please enter a number from 0 to 997.

OS14. (CATI) [J31 NAME] etc [CHILD/CHILDREN] OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

After [you / [MOTHER] / [J31]’s ([J31NAML]) [MULT BIRTH: and [J31]’s ([J31NAML]) etc] mother] found out [you were / she was] pregnant this time (with [J31] ([J31NAML]) [MULT BIRTH: and [J31] ([J31NAML]) etc]), did [you / she] smoke cigarettes at all during the pregnancy?

| 1. Yes | 5. No |

→ GO TO OS16

GO TO OS15

(WEB) After [you / [MOTHER] / [J31]’s ([J31NAML]) [MULT BIRTH: and [J31]’s ([J31NAML]) etc] mother / the [twins / triplets / quadruplets / quintuplets / sextuplets / septuplets / octuplets] mother] found out [you were / she was] pregnant this time with ([J31] ([J31NAML]) [MULT BIRTH: and [J31] ([J31NAML]) and etc] / this child / the [twins / triplets / quadruplets / quintuplets / sextuplets / septuplets / octuplets]), did [you / she] smoke cigarettes at all during the pregnancy?

| 1. Yes | 5. No |

→ GO TO OS16

GO TO OS15
OS15. (CATI) [J31 NAME] etc [CHILD/CHILDREN] OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

On average, how many cigarettes did [you / [MOTHER] / [J31]’s ([J31NAML]) [MULT BIRTH: and [J31]’s ([J31NAML]) etc] mother] smoke per day after [you / she] found out that [you were / she was] pregnant this time (with [J31] ([J31NAML]) [MULT BIRTH: and [J31] ([J31NAML]) etc])?

- **DEFINITION:** A standard pack of cigarettes contains 20 cigarettes

0 – 997

(WEB) On average, how many cigarettes did [you / [MOTHER] / [J31]’s ([J31NAML]) [MULT BIRTH: and [J31]’s ([J31NAML]) etc] mother / the [twins / triplets / quadruplets / quintuplets / sextuplets / septuplets / octuplets] mother] smoke per day after [you / she] found out that [you were / she was] pregnant this time with [J31] ([J31NAML]) [MULT BIRTH: and [J31] ([J31NAML]) and etc] / this child / the [twins / triplets / quadruplets / quintuplets / sextuplets / septuplets / octuplets]?

A standard pack of cigarettes contains 20 cigarettes.

0 – 997 Cigarettes

CHECK: Please enter a number from 0 to 997.

OS16. (CATI) [J31 NAME] etc [CHILD/CHILDREN] OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

Did [you / [MOTHER] / [J31]’s ([J31NAML]) [MULT BIRTH: and [J31]’s ([J31NAML]) etc] mother] drink any alcoholic beverages, including beer, wine, or liquor, during the 12 months before [J31] ([J31NAML]) [MULT BIRTH: and [J31] ([J31NAML]) etc] [was / were] born?

1. Yes 5. No  → GO TO OS19

GO TO OS17

(WEB) Did [you / [MOTHER] / [J31]’s ([J31NAML]) [MULT BIRTH: and [J31]’s ([J31NAML]) etc] mother / the [twins / triplets / quadruplets / quintuplets / sextuplets / septuplets / octuplets] mother] drink any alcoholic beverages, including beer, wine, or liquor, during the 12 months before [J31] ([J31NAML]) [MULT BIRTH: and [J31] ([J31NAML]) and etc] / this child / the [twins / triplets / quadruplets / quintuplets / sextuplets / septuplets / octuplets] [was / were] born?

1. Yes 5. No  → GO TO OS19

GO TO OS17

OS17. (CATI) [J31 NAME] etc [CHILD/CHILDREN] OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

During [your / that] pregnancy, on average, how often did [you / 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

(WEB) During [your / that] pregnancy, on average, how often did [you / she] have any alcohol to drink?

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
OS19. (CATI) [J31 NAME] etc [CHILD/CHILDREN] OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
Was a cesarean delivery done?
- IF NECESSARY, PROBE: (Was/Were) [J31] ([J31NAML]) [MULT BIRTH: and [J31] ([J31NAML]) etc] delivered by an incision in [your / [MOTHER]'s / [J31]'s ([J31NAML]) [MULT BIRTH: and [J31]'s ([J31NAML]) etc] mother’s] abdomen?

1. Yes  
5. No  \rightarrow GO TO OS23Months 

GO TO OS20

(WEB) Was a cesarean delivery done?
A cesarean delivery is one in which the baby is delivered by an incision in the mother’s abdomen.

1. Yes  
5. No  \rightarrow GO TO OS23Months 

GO TO OS20

OS20. (CATI) [J31 NAME] etc [CHILD/CHILDREN] OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
Was this [your / [MOTHER]’s / [J31]’s ([J31NAML]) [MULT BIRTH: and [J31]’s ([J31NAML]) etc] mother’s first cesarean delivery, or did [you / she] have one before?

1. Yes, first cesarean 
5. No, had cesarean before 

(WEB) Was this [your / [MOTHER]’s / [J31]’s ([J31NAML]) [MULT BIRTH: and [J31]’s ([J31NAML]) etc] mother’s / the [twins / triplets / quadruplets / quintuplets / sextuplets / septuplets / octuplets] mother’s] first cesarean delivery, or did [you / she] have one before?

1. First cesarean delivery 
5. Has had a cesarean delivery before 

GO TO OS20
**OS23MONTHS, OS23WEEKS.** *(CATI)* [J31 NAME] etc [CHILD/CHILDREN] OF: [CYNAMF] [CYNAML] [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

How many months or weeks had [you / [MOTHER] / [J31]’s ([J31NAML]) [MULT BIRTH: and [J31]’s ([J31NAML]) etc] mother] been pregnant when [J31] ([J31NAML]) [MULT BIRTH: and [J31] ([J31NAML]) etc] [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

<table>
<thead>
<tr>
<th>Number of weeks</th>
<th>GO TO OS24</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 – 10</td>
<td>[DK/RF]</td>
</tr>
</tbody>
</table>

How many months or weeks had [you / [MOTHER] / [J31]’s ([J31NAML]) [MULT BIRTH: and [J31]’s ([J31NAML]) etc] mother] been pregnant when [J31] ([J31NAML]) [MULT BIRTH: and [J31] ([J31NAML]) etc] [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

<table>
<thead>
<tr>
<th>Number of months</th>
<th>GO TO OS24</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 – 10</td>
<td>[DK/RF]</td>
</tr>
</tbody>
</table>

SIGNAL for <6 months/24 weeks or >10 months/44 weeks: R has reported a [live birth occurring earlier than 24 weeks or 6 months of pregnancy / 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.

*(WEB)* How many months or weeks had [you / [MOTHER] / [J31]’s ([J31NAML]) [MULT BIRTH: and [J31]’s ([J31NAML]) etc] mother / the [twins / triplets / quadruplets / quintuplets / sextuplets / septuplets / octuplets] mother] been pregnant when [J31] ([J31NAML]) [MULT BIRTH: and [J31] ([J31NAML]) and etc] / this child / the [twins / triplets / quadruplets / quintuplets / sextuplets / septuplets / octuplets] [was / were] born?

Please provide a number of weeks or a number of months.
A normal pregnancy is about 36 weeks or 9 months.

**OS23WKS. Default**

<table>
<thead>
<tr>
<th>Number of weeks</th>
<th>GO TO OS27</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 – 44</td>
<td>[NA]</td>
</tr>
</tbody>
</table>

**OS23MOS. Alternate**

<table>
<thead>
<tr>
<th>Number of months</th>
<th>GO TO OS24</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 – 10</td>
<td>[NA]</td>
</tr>
</tbody>
</table>

SIGNAL for <24 weeks/6 months: Please confirm your response of [[OS23WKS] weeks / [OS23MOS] months].

CHECK: Please enter a number from 1 to [OS23WKS: 44 / OS23MOS: 10].
A preterm delivery is one that occurs at 36 weeks or earlier in pregnancy. As far as you know, did [you / [MOTHER] / [J31]’s ([J31NAML]) [MULT BIRTH: and [J31]’s ([J31NAML]) etc] mother have a preterm delivery?

1. Yes 5. No

When [J31] ([J31NAML]) [MULT BIRTH: and [J31] ([J31NAML]) etc] [was / were] born, how was the delivery and any follow-up care paid?

- ENTER all that apply
- PROBE: Any other ways?
- IF needed / IF R mentions the name of the provider: Was it paid using employer provided health insurance, private health insurance, a government program like Medicare or Medicaid, out of pocket, or what?
- IF R mentions government plan: Is that Medicare, Medi-gap, Medicaid or a state program, military provided such as Tricare, ChampUS or ChampVA, Indian health insurance, or some other plan?
- IF needed (if Affordable Care Act/Obamacare/Health Insurance Exchanges mentioned): Was that a privately purchased health insurance plan or Medicaid/[STATEMEDPROG]/[SCHIPNAME]?
- 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
3. Military Health Care/Tricare (active duty)
4. Indian Health Insurance
5. Medicaid/[STATEMEDPROG]/[SCHIPNAME]
6. TRICARE/CHAMPUS/CHAMP-VA (dependents, veterans)
7. Veterans Administration (VA)
8. Out-of-pocket payment
9. Other - Please specify: (OS27SPEC)
10. Other - Please specify: (OS27SPEC)
11. No payment required

Please select all that apply.

1. Employer provided health insurance (Current or former employer)
2. Private health insurance purchased
3. Military Health Care/Tricare (active duty)
4. Indian Health Insurance
5. Medicaid/[STATEMEDPROG]/[SCHIPNAME]
6. TRICARE/CHAMPUS/CHAMP-VA (dependents, veterans)
7. Veterans Administration (VA)
8. Out-of-pocket payment
9. Other - Please specify: (OS27SPEC)
10. Other - Please specify: (OS27SPEC)
11. No payment required

CHECK: You cannot select “No payment” with other responses.
OS28CKPT. CAI Checkpoint: Whether Newborn Living or Deceased

1. Newborn Living (OS5<>6)  
5. Newborn Deceased (OS5=6) → GO TO OS33 END RULE

SECTION_J[1..24].NEWBORNOTADP[1..10].OS28B32[1..8] [1..24]=AQS; [1..10]=Which birth; [1..8]=Which child

OS28. (CATI) [J31 NAME] CHILD OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
(And) How many days did [J31] ([J31NAML]) stay in the hospital?

• ENTER number of days

<table>
<thead>
<tr>
<th>1 – 900</th>
<th>DK/RF</th>
<th>0 996. None, wasn’t born in the hospital (SP_0B)</th>
<th>0 997. None, didn’t stay in the hospital (SP_0A)</th>
<th>0 995. Less than 1 day (SP_0C)</th>
<th>0 994. Still in the hospital (SP_0D)</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO OS30</td>
<td></td>
<td>GO TO OS33 END RULE</td>
<td>GO TO OS30</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

(WEB) How many days did [J31] ([J31NAML]) stay in the hospital?

<table>
<thead>
<tr>
<th>1 – 900</th>
<th>Days</th>
<th>→ GO TO OS30</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 996. None, wasn’t born in the hospital (SP_0B)</td>
<td>→ GO TO OS33 END RULE</td>
<td></td>
</tr>
<tr>
<td>0 997. None, didn’t stay in the hospital (SP_0A)</td>
<td>→ GO TO OS33 END RULE</td>
<td></td>
</tr>
<tr>
<td>0 995. Less than 1 day (SP_0C)</td>
<td>→ GO TO OS30</td>
<td></td>
</tr>
<tr>
<td>0 994. Still in the hospital (SP_0D)</td>
<td>NA</td>
<td>→ GO TO OS30</td>
</tr>
</tbody>
</table>

CHECK: Please enter a number from 1 to 900.

OS30. (CATI) [J31 NAME] CHILD OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
Did [J31] ([J31NAML]) 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 OS33 END RULE

GO TO OS31

(WEB) Did [J31] ([J31NAML]) receive any newborn care in an intensive care unit, premature nursery, or any other type of special care facility?

<table>
<thead>
<tr>
<th>1. Yes</th>
<th>5. No</th>
<th>→ GO TO OS33 END RULE</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO OS31</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

OS31. (CATI) [J31 NAME] CHILD OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
How many days did [J31] ([J31NAML]) stay in this special care facility after birth?

• ENTER number of days

<table>
<thead>
<tr>
<th>1 – 900</th>
<th>0 994. Still in the special care facility (SP_0D)</th>
</tr>
</thead>
</table>

SIGNAL for OS31>150: You have entered more than 150 days; please VERIFY with Respondent.

(WEB) How many days did [J31] ([J31NAML]) stay in this special care facility after birth?

<table>
<thead>
<tr>
<th>1 – 900</th>
<th>0 994. Still in the special care facility (SP_0D)</th>
</tr>
</thead>
</table>

CHECK: Please enter a number from 1 to 900.
OS32. (CATI) [J31 NAME] CHILD OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] (Respondent)

Did [J31] ([J31NAML]) require assisted ventilation for more than 30 minutes?
- IF needed: Assisted ventilation is the use of machine - called a ventilator – to assist a baby’s breathing.

1. Yes 5. No ➔ GO TO OS33 END RULE

GO TO OS33

(WEB) Did [J31] ([J31NAML]) require assisted ventilation for more than 30 minutes?

Assisted ventilation is the use of machine - called a ventilator - to assist a baby’s breathing.

1. Yes 5. No ➔ GO TO OS33 END RULE

GO TO OS33

OS33. (CATI) [J31 NAME] CHILD OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] (Respondent)

How many days did [J31] ([J31NAML]) require ventilation?
- ENTER number of days

1 – 997

(WEB) How many days did [J31] ([J31NAML]) require ventilation?

1 – 997 Days

CHECK: Please enter a number from 1 to 997.

OS33 END RULE: Whether Newborn is Single or Multiple Birth

Single Birth; No More Newborns of Multiple Birth ➔ REPEAT OS28 - OS33; Max=8; Then GO TO OS40 RULE

More Newborns of Multiple Birth ➔ REPEAT OS28 - OS33; Max=8; Then GO TO OS40 RULE

End OS28B32

OS40 RULE: Whether Newborn is Single or Multiple Birth

Single Birth; or 1st Newborn of Multiples (OS11CKPT=1) ➔ GO TO OS64CKPT

Other Newborn of Multiples (OS11CKPT=5) ➔ GO TO OS64CKPT
OS40.  (CATI) [J31 NAME] etc [CHILD/CHILDREN] OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
When [you / [MOTHER] / [J31]'s ([J31NAML]) [MULT BIRTH: and [J31]'s ([J31NAML]) etc] mother] [were / was] pregnant with [J31] ([J31NAML]) [MULT BIRTH: and [J31] ([J31NAML]) etc], did [you / she] ever visit a doctor or other medical care provider in person or virtually (telehealth) 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

GO TO OS41

(WEB) When [you / [MOTHER] / [J31]'s ([J31NAML]) [MULT BIRTH: and [J31]'s ([J31NAML]) etc] mother / the [twins / triplets / quadruplets / quintuplets / sextuplets / septuplets / octuplets] mother] [were / was] pregnant with [J31] ([J31NAML]) [MULT BIRTH: and [J31] ([J31NAML]) and etc] / this child / the [twins / triplets / quadruplets / quintuplets / sextuplets / septuplets / octuplets], did [you / she] ever visit a doctor or other medical care provider in person or virtually (telehealth) for prenatal care, that is, for one or more pregnancy check-ups?

Please include visits to a midwife or a birthing center.

1. Yes  5. No  → GO TO OS51

GO TO OS41

OS41.  (CATI) [J31 NAME] etc [CHILD/CHILDREN] OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
How many weeks pregnant [were / was] [you / [MOTHER] / [J31]'s ([J31NAML]) [MULT BIRTH: and [J31]'s ([J31NAML]) etc] mother] at the time of [your / her] first in person or virtual (telehealth) 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  DK/RF  → GO TO OS42

GO TO OS43

(WEB) Including visits to a midwife or a birthing center, how many weeks pregnant [were / was] [you / [MOTHER] / [J31]'s ([J31NAML]) [MULT BIRTH: and [J31]'s ([J31NAML]) etc] mother / the [twins / triplets / quadruplets / quintuplets / sextuplets / septuplets / octuplets] mother] at the time of [your / her] first in person or virtual (telehealth) prenatal care visit?

Weeks of pregnancy should be counted as completed weeks since the last normal menstrual period.

0 – 40  Weeks  NA  → GO TO OS42

GO TO OS43

CHECK: Please enter a number from 1 to 40.

OS42.  (CATI) [J31 NAME] etc [CHILD/CHILDREN] OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
Was it less than three months (12 weeks), more than three months (12 weeks), or what?

1. Less than 3 months  2. More than 3 months  3. About 3 months  DK/RF

GO TO OS43  GO TO OS42A  GO TO OS43

(WEB) Was it ...?

1. Less than 3 months (12 weeks)  2. More than 3 months (12 weeks)  3. About 3 months (12 weeks)  NA
OS42A. (CATI) [J31 NAME] etc [CHILD/CHILDREN] OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [Respondent]
Was it less than six months (24 weeks), more than six months (24 weeks), or what?

1. Less than 6 months  2. More than 6 months  3. About 6 months

(WEB) Was it ...?

1. Less than 6 months (24 weeks)  2. More than 6 months (24 weeks)  3. About 6 months (24 weeks)

OS43. (CATI) [J31 NAME] etc [CHILD/CHILDREN] OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [Respondent]
How many in person or virtual (telehealth) visits to a doctor or other medical care provider for prenatal care did [you / [MOTHER] / [J31]’s ([J31NAML]) [MULT BIRTH: and [J31]’s ([J31NAML]) etc] mother] have when [you were / she was] pregnant with [J31] ([J31NAML]) [MULT BIRTH: and [J31] ([J31NAML]) etc]?

- 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 – 97

(WEB) How many in person or virtual (telehealth) visits to a doctor or other medical care provider for prenatal care did [you / [MOTHER] / [J31]’s ([J31NAML]) [MULT BIRTH: and [J31]’s ([J31NAML]) etc] mother / the [twins / triplets / quadruplets / quintuplets / sextuplets / septuplets / octuplets] mother] have when [you were / she was] pregnant with [J31] ([J31NAML]) [MULT BIRTH: and [J31] ([J31NAML]) etc] / this child / the [twins / triplets / quadruplets / quintuplets / sextuplets / septuplets / octuplets]? Please include visits to a midwife or a birthing center.

Please do not include visits for the Women, Infants, and Children (WIC) nutritional program.

1 – 97 Visits

CHECK: Please enter a number from 1 to 97.

OS47. (CATI) [J31 NAME] etc [CHILD/CHILDREN] OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [Respondent]
Where did [you / [MOTHER] / [J31]’s ([J31NAML]) [MULT BIRTH: and [J31]’s ([J31NAML]) etc] mother] go [OS43<>1: most of the time] for [your / her] in person or virtual (telehealth) prenatal [OS43=1: visit / ALL OTHERS: visits] with a doctor or other medical care provider?

- 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


Please include visits to a midwife or a birthing center.

Please do not include visits for the Women, Infants, and Children (WIC) nutritional program.

1. A clinic or health center  2. A doctor’s office or Health Maintenance Organization (HMO)
3. A hospital emergency room  4. A hospital outpatient department
5. A midwife or a birthing center  6. Some other place  7. Didn’t go to one place most often
OS48. (CATI) [J31 NAME] etc [CHILD/CHILDREN] OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] ([Respondent])
How was [your / [MOTHER]'s / [J31]'s ([J31NAML]) [MULT BIRTH: and [J31]'s ([J31NAML]) etc] mother’s] prenatal care paid for?
- ENTER all that apply
- PROBE: Any other ways?
- IF needed/IF R mentions the name of the provider: Was it paid using employer provided health insurance, private health insurance, a government program like Medicare or Medicaid, out of pocket, or what?
- IF R mentions government plan: Is that Medicare, Medi-gap, Medicaid or a state program, military provided such as Tricare, ChampUS or ChampVA, Indian health insurance, or some other plan?
- IF needed (if Affordable Care Act/Obamacare/Health Insurance Exchanges mentioned): Was that a privately purchased health insurance plan or Medicaid/STATEMEDPROG/[SCHIPNAME]?
- 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
3. Medicare/STATEMEDPROG/[SCHIPNAME]
4. Military Health Care/Tricare (active duty)
5. TRICARE/CHAMPUS/CHAMP-VA (dependents, veterans)
6. Indian Health Insurance
7. Veterans Administration (VA)
8. Out-of-pocket payment
9. Other-specify (OS48SPEC. Specify (String 100))
13. No payment required

(Web) How was [your / [MOTHER]'s / [J31]'s ([J31NAML]) [MULT BIRTH: and [J31]'s ([J31NAML]) etc] mother’s / the [twins / triplets / quadruplets / sextuplets / septuplets / octuplets] mother’s] prenatal care paid for, or how do you think the bill will be paid?
Please select all that apply.
1. Employer provided health insurance (Current or former employer)
2. Private health insurance purchased
3. Medicare/STATEMEDPROG/[SCHIPNAME]
4. Military Health Care/Tricare (active duty)
5. TRICARE/CHAMPUS/CHAMP-VA (dependents, veterans)
8. Indian Health Insurance
9. Veterans Administration (VA)
12. Out-of-pocket payment
97. Other - Please specify: (OS48SPEC)
13. No payment required

CHECK: You cannot select “No payment” with other responses.
OS51, OS51KILO. (CATI) [J31 NAME] etc [CHILD/CHILDREN] OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

What was [your / [MOTHER]’s / [J31]’s ([J31NAML]) [MULT BIRTH: and [J31]’s ([J31NAML]) etc] mother’s] weight just before [you / she] delivered?

- ENTER weight in POUNDS
- Or PRESS [Enter] to continue to next screen for kilograms
- If more than 400 pounds, ENTER [400]

[ENTER] 50 – 997 DK/RF

GO TO OS52

(What was [your / [MOTHER]’s / [J31]’s ([J31NAML]) [MULT BIRTH: and [J31]’s ([J31NAML]) etc] mother’s] weight just before [you / she] delivered?)

- ENTER weight in KILOGRAMS
- If more than 180 kilograms, ENTER [180]

36.0 – 453.2

(WEB) What was [your / [MOTHER]’s / [J31]’s ([J31NAML]) [MULT BIRTH: and [J31]’s ([J31NAML]) etc] mother’s / the [twins / triplets / quadruplets / quintuplets / sextuplets / septuplets / octuplets] mother’s] weight just before [you / she] became pregnant with [J31] ([J31NAML]) [MULT BIRTH: and [J31] ([J31NAML]) etc]?

- ENTER weight in POUNDS
- Or PRESS [Enter] to continue to next screen for kilograms
- If more than 400 pounds, ENTER [400]

[ENTER] 50 – 997 DK/RF

GO TO OS53CKPT

(What was [your / [MOTHER]’s / [J31]’s ([J31NAML]) [MULT BIRTH: and [J31]’s ([J31NAML]) etc] mother’s / the [twins / triplets / quadruplets / quintuplets / sextuplets / septuplets / octuplets] mother’s] weight just before [you / she] became pregnant with [J31] ([J31NAML]) [MULT BIRTH: and [J31] ([J31NAML]) etc]?)

- ENTER weight in KILOGRAMS
- If more than 180 kilograms, ENTER [180]

36.0 – 453.2

### OS53CKPT. CAI Checkpoint: Whether Weight Loss, Gain, or No Change (1 LB=0.45 KG; 1 KG=2.2 LB)

<table>
<thead>
<tr>
<th>1. OS51 minus OS52=Weight Loss</th>
<th>2. OS51 minus OS52=Weight Gain</th>
<th>3. OS51 minus OS52=No Change</th>
<th>5. All Others → GO TO OS56</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ] 1. Yes</td>
<td>[ ] 5. No</td>
<td>GO TO OS54</td>
<td>GO TO OS55</td>
</tr>
</tbody>
</table>

#### OS53. (CATI) [J31 NAME] etc [CHILD/CHILDREN] OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

Does that mean that [you / she] lost ([OS52] minus [OS51]) pounds ([OS52KILO] minus [OS51KILO]) kilograms during [your / her] pregnancy?
- IF necessary, verify weights and go back to correct
- Weight before delivery: [OS51] pounds ([OS51KILO] kilograms)
- Weight before pregnancy: [OS52] pounds ([OS52KILO] kilograms)

1. Yes 5. No

GO TO OS58CKPT

(WEBS) Does that mean that [you / she] lost ([OS52] minus [OS51]) pounds / [OS52KILO] minus [OS51KILO] kilograms during [your / her] pregnancy?

1. Yes 5. No

GO TO OS58CKPT

#### OS54. (CATI) [J31 NAME] etc [CHILD/CHILDREN] OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

Does that mean that [you / she] gained ([OS51] minus [OS52]) pounds ([OS51KILO] minus [OS52KILO]) kilograms during [your / her] pregnancy?
- IF necessary, verify weights and go back to correct
- Weight before delivery: [OS51] pounds ([OS51KILO] kilograms)
- Weight before pregnancy: [OS52] pounds ([OS52KILO] kilograms)

1. Yes 5. No

GO TO OS58CKPT

(WEBS) Does that mean that [you / she] gained ([OS51] minus [OS52]) pounds / [OS51KILO] minus [OS52KILO] kilograms during [your / her] pregnancy?

1. Yes 5. No

GO TO OS58CKPT

#### OS55. (CATI) [J31 NAME] etc [CHILD/CHILDREN] OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

Does that mean that [you / she] did not gain or lose any weight during [your / her] pregnancy?
- IF necessary, verify weights and go back to correct
- Weight before delivery: [OS51] pounds ([OS51KILO] kilograms)
- Weight before pregnancy: [OS52] pounds ([OS52KILO] kilograms)

1. Yes 5. No

GO TO OS58CKPT

(WEBS) Does that mean that [you / she] did not gain or lose any weight during [your / her] pregnancy?

1. Yes 5. No

GO TO OS58CKPT
OS56. (CATI) [J31 NAME] etc [CHILD/CHILDREN] OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] (Respondent)

Did [you / [MOTHER] / [J31]'s ([J31NAML]) MULT BIRTH: and [J31]'s ([J31NAML]) etc] mother gain or lose weight during [your / her] pregnancy (with [J31] ([J31NAML]) MULT BIRTH: and [J31] ([J31NAML]) etc)?

1. Gained weight  2. Lost weight  3. Did not gain or lose any weight  DK/RF

GO TO OS57


1. Gained weight  2. Lost weight  3. Did not gain or lose any weight  NA

GO TO OS57

OS57. (CATI) [J31 NAME] etc [CHILD/CHILDREN] OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] (Respondent)

How much weight did [you / she] OS56=GAINED: gain / OS56=LOST: lose? 

- ENTER weight in POUNDS
- Or PRESS [Enter] to continue to next screen for kilograms

[ENTER] 1 – 997  DK/RF

↓ GO TO OS58CKPT

OS57Kilo. (CATI) [J31 NAME] etc [CHILD/CHILDREN] OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] (Respondent)

How much weight did [you / she] OS56=GAINED: gain / OS56=LOST: lose? 

- ENTER number of KILOGRAMS

0.5 – 408.2

WEB) How much weight did [you / she] OS56=GAINED: gain / OS56=LOST: lose?

OS57. Default

To enter kilograms instead, click here.

50 – 997 Pounds

CHECK: Please enter a number from 50 to 997.

OS57Kilo. Alternate

To enter pounds instead, click here.

36.0 – 453.2 Kilograms

CHECK: Please enter a number from 36.0 to 453.2.

Biological Newborn - Parents' Pregnancy Intention

OS58CKPT. CAI Checkpoint: Whether R Is Parent of Newborn

1. R=Parent (RESPAQSN=MOMAQSN or DADAQSN)  5. All Others → GO TO OS64CKPT

↓

About Birth Mother

OS58. (CATI) [J31 NAME] etc [CHILD/CHILDREN] OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] (Respondent)

At the time [you / [MOTHER] / [J31]'s ([J31NAML]) MULT BIRTH: and [J31]'s ([J31NAML]) etc] mother] became pregnant with [J31] ([J31NAML]) MULT BIRTH: and [J31] ([J31NAML]) etc], were you / was she using any methods to keep from getting pregnant?

- Methods to keep from getting pregnant include contraceptives, such as condoms or the pill, or
behaviors, such as rhythm method or withdrawal

- 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  DK/RF

GO TO OS58A  GO TO OS59  GO TO OS60CKPT  GO TO OS58A

(WEB) At the time [you / [MOTHER] / [J31]'s ([J31NAML]) [MULT BIRTH: and [J31]'s ([J31NAML]) etc] mother / the [twins / triplets / quadruplets / quintuplets / sextuplets / septuplets / octuplets] mother] became pregnant with ([J31] ([J31NAML]) [MULT BIRTH: and [J31] ([J31NAML]) and etc] / this child / the [twins / triplets / quadruplets / quintuplets / sextuplets / septuplets / octuplets]], [were you / was she] using any methods to keep from getting pregnant?

Methods to keep from getting pregnant include contraceptives, such as condoms or the pill, or behaviors, such as rhythm method or withdrawal

1. Yes 5. No 7. Never used any methods to prevent pregnancy  DK/RF

GO TO OS58A  GO TO OS59  GO TO OS60CKPT  GO TO OS58A

OS58A. [J31 NAME] etc [CHILD/CHILDREN] OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [Respondent]

What method(s) of contraception were [you / [MOTHER] / [J31]'s ([J31NAML]) [MULT BIRTH: and [J31]'s ([J31NAML]) etc] mother], using at the time [you/she] became pregnant?

- ENTER all that apply
- PROBE: Any others?
- READ list if needed, pausing after each option to allow R to respond

97. (SP_0a) None

1. Condom or female condom
2. Withdrawal (pulling out)
3. Fertility awareness based methods (Rhythm)
4. Spermicide (foam, gel, jelly, cream, sponge or suppositories)
5. Diaphragm (with or without gel)
6. IUD (intrauterine device)
7. Emergency contraception (Morning after pill, Plan B)
8. Birth control pills
9. Depo-Provera or injectables
10. Norplant or implant
11. Patch (Ortho Evra) or ring (Nuvaring)
12. Cap (Femcap) or shield (Lea’s shield)
13. Vasectomy
14. Tubal ligation
15. Other – Please specify: (OS58ASPEC (String 100))

(WEB) What methods of contraception were [you / [MOTHER] / [J31]'s ([J31NAML]) [MULT BIRTH: and [J31]'s ([J31NAML]) etc] mother / the [twins / triplets / quadruplets / quintuplets / sextuplets / septuplets / octuplets] mother] using at the time [you/she] became pregnant?

Remember to include methods that men use, such as condoms, vasectomy, and withdrawal. Please select all that apply.

97. (SP_0a) None
1. Condom or female condom
2. Withdrawal (pulling out)
3. Fertility awareness based methods (Rhythm)
4. Spermicide (foam, gel, jelly, cream, sponge or suppositories)
5. Diaphragm (with or without gel)
6. IUD (intrauterine device)
7. Emergency contraception (Morning after pill, Plan B)
8. Birth control pills
9. Depo-Provera or injectables
10. Norplant or implant
11. Patch (Ortho Evra) or ring (Nuvaring)
12. Cap (Femcap) or shield (Lea’s shield)
13. Vasectomy
14. Tubal ligation
15. Other – Please specify: (OS58ASPEC (String 100))

OS59. (CATI) [J31 NAME] etc [CHILD/CHILDREN] OF: [CYNAMF] [CYAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] ([Respondent])
Had [you / MOTHER / J31’s (J31NAML)] [MULT BIRTH: and J31’s (J31NAML)] etc] mother] stopped all methods before [you / 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

1. Stopped Contraception
((OS58=Yes & OS59=Yes) or (OS58=7) or (OS58=No, DK, RF, NA & OS59=Yes, No, DK, RF, NA))

5. All Others \rightarrow GO TO OS35

About Birth Mother

OS60. (CATI) [J31 NAME] etc [CHILD/CHILDREN] OF: [CYNAMF] [CYAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] ([Respondent])
Was the reason [you / MOTHER / J31’s (J31NAML)] [MULT BIRTH: and J31’s (J31NAML)] etc] mother] [OS59=YES: stopped / ALL OTHERS: [were / was] not] using any methods because [you / MOTHER / J31’s (J31NAML)] [MULT BIRTH: and J31’s (J31NAML)] etc] mother] wanted to become pregnant?

1. Yes \rightarrow GO TO OS35 5. No

1. Yes → GO TO OS35
5. No

OS60A. (CATI) [J31 NAME] etc [CHILD/CHILDREN] OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [([Respondent])]

What was the reason [you / [MOTHER] / [J31]’s ([J31NAML]) [MULT BIRTH: and [J31]’s ([J31NAML]) etc] mother] [OS59=YES: stopped / ALL OTHERS: [were / was] not] using any methods?

• ENTER all that apply

1. Birth mother did not expect to have sex at all
2. Birth mother doesn’t have sex very often
3. Birth mother didn’t think she could become pregnant
4. Birth mother didn’t really mind or wanted to become pregnant
5. Birth mother was worried about the side effects of birth control
6. Birth mother could not get any contraception or preferred contraception
8. Birth mother forgot to use it or didn’t use it all the time
9. Birth mother was told by doctor she could not become pregnant
7. Other – Please specify: (OS60ASPEC. Specify (String 100))

(WE) What was the reason [you / [MOTHER] / [J31]’s ([J31NAML]) [MULT BIRTH: and [J31]’s ([J31NAML]) etc] mother] did not expect to have sex at all

2. [You / [MOTHER] / [J31]’s ([J31NAML]) [MULT BIRTH: and [J31]’s ([J31NAML]) etc] mother] [don’t / doesn’t] have sex very often
3. [You / [MOTHER] / [J31]’s ([J31NAML]) [MULT BIRTH: and [J31]’s ([J31NAML]) etc] mother] did not think [you/she] could become pregnant
4. [You / [MOTHER] / [J31]’s ([J31NAML]) [MULT BIRTH: and [J31]’s ([J31NAML]) etc] mother] didn’t really mind or wanted to become pregnant
5. [You / [MOTHER] / [J31]’s ([J31NAML]) [MULT BIRTH: and [J31]’s ([J31NAML]) etc] mother] were/ was worried about the side effects of birth control
6. [You / [MOTHER] / [J31]’s ([J31NAML]) [MULT BIRTH: and [J31]’s ([J31NAML]) etc] mother] could not get any contraception or preferred contraception
8. [You / [MOTHER] / [J31]’s ([J31NAML]) [MULT BIRTH: and [J31]’s ([J31NAML]) etc] mother] forgot to use it or didn’t use it all the time
9. [You / [MOTHER] / [J31]’s ([J31NAML]) [MULT BIRTH: and [J31]’s ([J31NAML]) etc] mother] [was / were] told by doctor [you/she] could not become pregnant
7. Other – Please specify: (OS60ASPEC. Specify (String 100))
About R & Other Birth Parent

OS35. (CATI) [J31 NAME] etc [CHILD/CHILDREN] OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]


1. Yes  5. No


1. Yes  5. No

OS62CKPT. CAI Checkpoint: Whether R Is Mother of Newborn

1. R=Mother (RESPASN=MOMAQN)  5. All Others → GO TO OS63CKPT
About Birth Mother if R=Birth Father

OS62. (CATI) [J31 NAME] etc [CHILD/CHILDREN] OF: [CYNAMF] [CYNAML] [CYAQRTH], [CYFUHU], Age [AGEIWDATE] ([Respondent])
Just before you became pregnant (with [J31] ([J31NAML]) [MULT BIRTH: and [J31] ([J31NAML]) etc]), did you yourself want to have a baby?

1. Yes → GO TO OS63CKPT
      5. No → GO TO OS63CKPT

(WEB) Just before you became pregnant with [[J31] ([J31NAML]) [MULT BIRTH: and [J31] ([J31NAML]) and etc] / this child / the [twins / triplets / quadruplets / quintuplets / sextuplets / septuplets / octuplets]], did you yourself want to have a baby?

1. Yes → GO TO OS63CKPT
      5. No → GO TO OS63CKPT

OS62A. (CATI) [J31 NAME] etc [CHILD/CHILDREN] OF: [CYNAMF] [CYNAML] [CYAQRTH], [CYFUHU], Age [AGEIWDATE] ([Respondent])
How did you feel about having a baby at that time – did you want a baby but not at that time, or did you want none or no more at all, or did it not matter?

1. Not at that time 2. None or no more at all 3. Didn’t matter

(WEB) How did you feel about having a baby at that time?

1. I wanted a baby, but not at that time
2. I did not want a baby or any more babies
3. It didn’t matter whether or not I had a baby

OS63CKPT. CAI Checkpoint: Whether R is Father of Newborn

1. R=Father (RESPAQSN=DADAQSN) 5. All Others → GO TO NEWBORN END RULE

About Birth Father if R=Birth Father

OS63. (CATI) FU Member: [CYNAMF] [CYNAML] [CYAQRTH], [CYFUHU], Age [AGEIWDATE] ([Respondent])
Child [1-8]: [J31 NAME]
Just before [[MOTHER] /[J31]’s ([J31NAML]) [MULT BIRTH: and [J31]’s ([J31NAML]) etc] mother] became pregnant (with [J31] ([J31NAML]) [MULT BIRTH: and [J31] ([J31NAML]) etc]), did you want to have a child?

1. Yes → GO TO NEWBORN END RULE
      5. No → GO TO NEWBORN END RULE


1. Yes → GO TO NEWBORN END RULE
      5. No → GO TO NEWBORN END RULE
OS63A. *(CATI)* FU Member: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] *(Respondent)*

Child [1-8]: [J31 NAME]

How did you feel about having a child at that time — did you want to have a child but not at that time, or did you want to have none or no more at all, or did it not matter?

1. Not at that time  
2. None or no more at all  
3. Didn’t matter

*(WEB)* How did you feel about having a baby at that time?

1. I wanted a child, but not at that time  
2. I did not want a child or any more children  
3. It didn’t matter whether or not I had a child

**NEWBORN END RULE: Whether More Children at J31**

| More Children | REPEAT OS11CKPT - OS63A; Max=20; Then GO TO OS64CKPT | No More Children |

**End NEWBORNNOTADP**

**R’s Future Pregnancy Intention**

**OS64CKPT. CAI Checkpoint: Whether R is Parent of Any Newborn for This FU Member or is any RP or a SP between 15-44 years old**

1. R is Parent of a Newborn (RESPAQSN=MOMAQS or RESPAQSN=DADAQS For any Newborn 1-20)
2. R is RP or SP (& 15-44 years old if Female) & Not a Parent of a Newborn ((Coverscreen.Respondent=1 & HeadAge=15-44 & HeadAQRTH=102) or (Coverscreen.Respondent=1 & HeadAQRTH=101) or (Coverscreen.Respondent=2,3 & WQWAge=15-44 & WQWAQRTH=202,222) or (Coverscreen.Respondent=2,3 & WQWAQRTH=201, 221)) & RESPAQSN ≠ MOLMAD or DADAQS For any newborn 1-20
3. All Others → GO TO J32CKPT

**SECTION_J[1..24].PREGINTENTION [1..24]=AQS of FU Member**

RAQSN. AQS of Respondent. Assigned.

JAQSN. AQS of Section J FU Member. Assigned.

About R

**OS64. *(CATI)* FU Member: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] *(Respondent)*

Let’s talk about your pregnancy intentions. Looking to the future, do you yourself want a [R=MALE: child] or another [R=MALE: child] at some time, or are you unable to have (more) children?

- **IF needed:** Other than your children already born

| 1. Yes | 5. No | 7. Unable to have children or more children | DK/RF → GO TO OS65 |

**GO TO OS66CKPT**

*(WEB)* Looking to the future, do you yourself want a [R=MALE: child] or another [R=MALE: child] at some time?

| 1. Yes | 5. No | 7. Unable to have children or more children | NA → GO TO OS65 |
OS65. (CATI) FU Member: [CYNAMF] [CYNAML] [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

Do you think you probably want or probably do not want to have a [R=FEMALE: baby / R=MALE: child] or another [R=FEMALE: baby / R=MALE: child] at some time in the future?

• If R insists: Don’t know/not sure

1. Probably want 2. Probably do not want

(OS66CKPT) Do you think you probably want or probably do not want to have a [R=FEMALE: baby / R=MALE: child] or another [R=FEMALE: baby / R=MALE: child] at some time in the future?


OS66CKPT. CAI Checkpoint: Whether R Has Spouse-Partner or Boyfriend or Girlfriend in FU, or R=Married OFUM

1. R has a Male Spouse, Partner, Boyfriend (R=MRP) & there is a MSP (201, 221), Uncoop MSP (901, 921), or BF (881); or R=FRP (102) & there is an Uncoop MSP (901, 921) or BF (881); or R=MSP (201, 221)/FSP (202,222)/BF-GF (881, 882) & there is a MRP (101)

2. R has a Female Spouse, Partner, Girlfriend (R=MRP) & there is a MSP (201, 221), Uncoop FSP (902, 922), or GF (882); or R=FRP (102) & there is a FSP (202, 222) or an Uncoop FSP (902, 922) or GF (882); or R=FSP (202, 222)/BF-GF (881, 882) & there is a FRP (102)

3. R is Other OFUM, Female, Married (Not GF) (R=302-832 or 952-982 & MARITAL=Married)

4. R is Other OFUM, Male, Married (Not BF) (R=301-831 or 951-981 & MARITAL=Married)

5. All Others

GO TO OS70CKPT

About R's Spouse-Partner, Boyfriend, Girlfriend

OS66. (CATI) FU Member: [CYNAMF] [CYNAML] [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

[R=RP, SP, BF, GF & OS66CKPT=1, 2: Spouse or romantic partner of FU member: [CYAQRTH], [CYNAMF] [CYNAML], Age: [AGEIWDATE]]

Looking to the future, does [R=RP, SP, BF, GF & OS66CKPT=1, 2: [CYNAMF] [CYNAML]] / R=ALL OTHERS & OS66CKPT=3, 4: your spouse] want a [OS66CKPT=1: child / OS66CKPT=2, 4: baby] or another [child / baby] at some time? Would you say definitely yes, probably yes, probably no or definitely no?


(OS70CKPT) CAI Checkpoint: Whether Parent (and SP/BF/GF) Want More Children

1. Does Not Want or Cannot Have More Children (OS64=5, 7 & OS66CKPT=1; or, OS64=5, 7 & OS66CKPT=1, 2, 3, 4 & OS66=4) → GO TO OS70A

5. All Others

About R (and SP/BF/GF)

OS70. (CATI) FU Member: [CYNAMF] [CYNAML] [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

[R=RP, SP, BF, GF: Spouse or romantic partner of FU member: [CYAQRTH], [CYNAMF] [CYNAML], Age: [AGEIWDATE]]
Sometimes what people want and what they intend are different because they are not able to do what they want. The next question is about your \( R = RP, SP, BF, GF: \) and your spouse’s \( R = MOTHER: \) baby / \( R = FATHER: \) child in the future.

Altogether, how many [babies / children] do you [and [CYNAMF] \((CYNAML)\) / and your spouse] intend to have?

- **ENTER number of [babies / children]**
- Do not probe DK
- Includes current pregnancy
- Does not include intended adoptions or stepchildren
- **If needed:** “Intend” refers to what you [and [CYNAMF] \((CYNAML)\) / and your spouse] are actually going to try to do

<table>
<thead>
<tr>
<th>Babies / Children</th>
<th>95. None (SP_0C)</th>
</tr>
</thead>
</table>

About R

**OS70A. (CATI)** FU Member: [CYNAMF] \((CYNAML)\), [CYAQRTH], [CYFUHU], Age \( \text{AGEIWDATE} \) \((Respondent)\)

Have you used any method of contraception in the last three months?

1. Yes 5. No → GO TO OS70K

(WEB) Have you used any method of contraception in the last three months?

1. Yes 5. No → GO TO OS70K

**OS70B. (CATI)** FU Member: [CYNAMF] \((CYNAML)\), [CYAQRTH], [CYFUHU], Age \( \text{AGEIWDATE} \) \((Respondent)\)

What method(s) of contraception have you used in the last three months?

- **ENTER all that apply**
- **PROBE:** Any others?
- **READ list if needed, pausing after each option to allow R to respond**

<table>
<thead>
<tr>
<th>Method</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>97. (SP_0a) None</td>
<td>GO TO J32CKPT</td>
</tr>
<tr>
<td>1. Condom or female condom</td>
<td>GO TO J32CKPT</td>
</tr>
<tr>
<td>2. Withdrawal (pulling out)</td>
<td>GO TO J32CKPT</td>
</tr>
<tr>
<td>3. Fertility awareness based methods (Rhythm)</td>
<td>GO TO J32CKPT</td>
</tr>
<tr>
<td>4. Spermicide (foam, gel, jelly, cream, sponge or suppositories)</td>
<td>GO TO J32CKPT</td>
</tr>
<tr>
<td>5. Diaphragm (with or without gel)</td>
<td>GO TO J32CKPT</td>
</tr>
<tr>
<td>6. IUD (intrauterine device)</td>
<td>GO TO J32CKPT</td>
</tr>
<tr>
<td>7. Emergency contraception (Morning after pill, Plan B)</td>
<td>GO TO J32CKPT</td>
</tr>
<tr>
<td>8. Birth control pills</td>
<td>GO TO J32CKPT</td>
</tr>
<tr>
<td>9. Depo-Provera or injectables</td>
<td>GO TO J32CKPT</td>
</tr>
<tr>
<td>10. Norplant or implant</td>
<td>GO TO J32CKPT</td>
</tr>
<tr>
<td>11. Patch (Ortho Evra) or ring (Nuvaring)</td>
<td>GO TO J32CKPT</td>
</tr>
</tbody>
</table>
What methods of contraception have you used in the last three months? [R=FEMALE: Remember to include methods that men use, such as condoms, vasectomy, and withdrawal.]
Please select all that apply.

97. (SP_0a) None
1. Condom or female condom
2. Withdrawal (pulling out)
3. Fertility awareness based methods (Rhythm)
4. Spermicide (foam, gel, jelly, cream, sponge or suppositories)
5. Diaphragm (with or without gel)
6. IUD (intrauterine device)
7. Emergency contraception (Morning after pill, Plan B)
8. Birth control pills
9. Depo-Provera or injectables
10. Norplant or implant
11. Patch (Ortho Evra) or ring (Nuvaring)
12. Cap (Femcap) or shield (Lea’s shield)
13. Vasectomy
14. Tubal ligation
15. Other – Please specify: (OS70BSPEC (String 100))

OS70C1_M. (CATI) FU Member: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[(Respondent)]
In what month and year, or at what age, did [FEMALE: your partner / MALE: you] have a vasectomy?

- SELECT Month
- Or PRESS [Enter] to record Age
- If needed: Please tell me about the first time.
- PROBE DK month: Do you know what season it was?

OS70C1_AGE.

OS70C1_Y. (CATI) FU Member: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[(Respondent)]
(In what year did [FEMALE: your partner / MALE: you] have a vasectomy?)
The month entered is: [OS70C1_M]

- ENTER Year
- If R reports an age, GO BACK to OS70C1_M and PRESS [Delete] - then PRESS [Enter] to record Age
- If needed: Please tell me about the first time.

OS70C1_AGE.
Could you tell me how old [FEMALE: your partner was / MALE: you were] / ALL OTHERS: How old [FEMALE: was your partner / MALE: were you] when [FEMALE: your partner / MALE: you] had a vasectomy?

- If needed: Please tell me about the first time.

15 – 44 CHECK: Please enter an age from 15 to [RAGE-CURRENT AGE].

J32CKPT

WEB OS70C1_Y, OS70C1_M, OS70C1_AGE. When did [FEMALE: your partner / MALE: you] have a vasectomy? If you do not know the month, please select the season.

Select Month or Season

Select Year To enter your age instead, click here.

CHECK: Please enter a date before today.

To enter month and year instead, click here.

CHECK: Please enter an age from 15 to [RAGE-CURRENT AGE].

OS70C2_M. (CATI) FU Member: [CYNAMF] [CYNAML] [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

In what month and year, or at what age, did [FEMALE: you / MALE: your partner] have a tubal ligation?

- SELECT Month
- Or PRESS [Enter] to record Age
- If needed: Please tell me about the first time.
- PROBE DK month: Do you know what season it was?

[Enter]


GO TO OS70C2_AGE


DK/RF

J32CKPT

WEB OS70C2_Y, OS70C2_M, OS70C2_AGE. When did [FEMALE: you / MALE: your partner] have a tubal ligation?

If you do not know the month, please select the season.

Select Month or Season

Select Year To enter your age instead, click here.

CHECK: Please enter a date before today.

To enter month and year instead, click here.

CHECK: Please enter an age from 15 to [RAGE-CURRENT AGE].

OS70C2_AGE. (CATI) FU Member: [CYNAMF] [CYNAML] [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

In what year did [FEMALE: you / MALE: your partner] have a tubal ligation?

The month entered is: [OS70C2_M]

- ENTER Year
- If R reports an age, GO BACK to OS70C2_M and PRESS [Delete] - then PRESS [Enter] to record Age
- If needed: Please tell me about the first time.


GO TO J32CKPT

WEB OS70C2_Y, OS70C2_M, OS70C2_AGE. When did [FEMALE: you / MALE: your partner] have a tubal ligation?

If you do not know the month, please select the season.

default version
Select Month or Season

Select Year

To enter your age instead, click here.

CHECK: Please enter a date before today.

To enter month and year instead, click here.

CHECK: Please enter an age from 15 to [RAGE - CURRENT AGE].

OS70D_M. (CATI) FU Member: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

In what month and year, or at what age, did [FEMALE: you / MALE: your partner] begin using an IUD (intrauterine device) for the first time?

- SELECT Month
- Or PRESS [Enter] to record Age
- If needed: Please tell me about the first time.
- PROBE DK month: Do you know what season it was?

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

OS70D_Y. (CATI) FU Member: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

(In what year did [FEMALE: you / MALE: your partner] begin using an IUD (intrauterine device) for the first time?)

The month entered is: [OS70D_M]

- ENTER Year
- If R reports an age, GO BACK to OS70D_M and PRESS [Delete] - then PRESS [Enter] to record Age
- If needed: Please tell me about the first time.


GO TO OS70E_M

OS70D_AGE. (CATI) FU Member: [CYNAML] [CYNAMF]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

([OS70D_Y=DK/RF: Could you tell me how old [FEMALE: you were / MALE: your partner was] /ALL OTHERS: How old [FEMALE: were you / MALE: was your partner]] when [FEMALE: you / MALE: your partner] began using an IUD (intrauterine device) for the first time?)

- If needed: Please tell me about the first time.

15 – 44 CHECK: Please enter an age from 15 to [RAGE - CURRENT AGE].

OS70E_M

(WEB) OS70D_Y, OS70D_M, OS70D_AGE. When did [FEMALE: you / MALE: your partner] begin using an IUD (intrauterine device) for the FIRST time?

If you do not know the month, please select the season.

default version

Select Month or Season

Select Year

To enter your age instead, click here.

CHECK: Please enter a date before today.

To enter month and year instead, click here.

CHECK: Please enter an age from 15 to [RAGE - CURRENT AGE].

OS70E_M. (CATI) FU Member: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

In what month and year, or at what age, did [FEMALE: you / MALE: your partner] most recently begin using an IUD (intrauterine device)?

- SELECT Month
• Or PRESS [Enter] to record Age
• If needed: Please tell me about the most recent time.
• PROBE DK month: Do you know what season it was?

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

OS70E_Y

O 93. In [OS70D_M], [OS70D_Y] when first received an IUD (SP_0e)

GO TO J32CKPT

OS70E_Y. (CATI) FU Member: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

(In what year did [FEMALE: you / MALE: your partner] most recently begin using an IUD?)

The month entered is: [OS70E_M]

• ENTER Year
• If R reports an age, GO BACK to OS70E_M and PRESS [Delete] - then PRESS [Enter] to record Age
• If needed: Please tell me about the most recent time.


GO TO J32CKPT

OS70E_AGE. (CATI) FU Member: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

([OS70E_Y=DK/RF: Could you tell me how old [FEMALE: you were / MALE: your partner was] /ALL OTHERS: How old [FEMALE: were you / MALE: was your partner] when [FEMALE: you / MALE: your partner] most recently began using an IUD?]

• If needed: Please tell me about the most recent time.

15-44 O 92. Age [OS70D_AGE] when first received an IUD (SP_0f)

GO TO J32CKPT

CHECK: Please enter an age from 15 to [RAGE-CURRENT AGE].

(WEB) OS70E_Y, OS70E_M, OS70E_AGE. When did [FEMALE: you / MALE: your partner] MOST RECENTLY begin using an IUD (intrauterine device)?

If you do not know the month, please select the season.

default version

Select Month or Season Select Year To enter your age instead, click here.

CHECK: Please enter a date before today.

O 93. In [OS70D_M], [OS70D_Y] when first received an IUD (SP_0e)

alternate version

15 – 44 Age To enter month and year instead, click here.

CHECK: Please enter an age from 15 to [RAGE-CURRENT AGE].

O 92. Age [OS70D_AGE] when first received an IUD (SP_0f)

OS70F_M. (CATI) FU Member: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
In what month and year, or at what age, did [FEMALE: you / MALE: your partner] receive a Depo-Provera shot or other contraceptive injection for the first time?

- SELECT Month
- Or PRESS [Enter] to record Age
- If needed: Please tell me about the first time.
- PROBE DK month: Do you know what season it was?

<table>
<thead>
<tr>
<th>Month</th>
<th>Year</th>
<th>DK/RF</th>
</tr>
</thead>
</table>

OS70F_Y. (CATI) FU Member: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
(In what year did [FEMALE: you / MALE: your partner] receive a Depo-Provera shot or other contraceptive injection for the first time?)

The month entered is: [OS70F_M]
- ENTER Year
- If R reports an age, GO BACK to OS70F_M and PRESS [Delete] - then PRESS [Enter] to record Age
- If needed: Please tell me about the first time.

[CHECK: Please enter a date before today.]

OS70F_AGE. (CATI) FU Member: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

[(OS70F_Y=DK/RF): Could you tell me how old [FEMALE: you were / MALE: your partner was] / ALL OTHERS: How old [FEMALE: were you / MALE: was your partner] when [FEMALE: you / MALE: your partner] received a Depo-Provera shot other contraceptive injection for the first time?]
- If needed: Please tell me about the first time.

15 – 44 [CHECK: Please enter an age from 15 to [RAGE - CURRENT AGE].]

OS70G_M. (WEB) OS70F_Y, OS70F_M, OS70F_AGE. When did [FEMALE: you / MALE: your partner] FIRST receive a Depo-Provera shot or other contraceptive injection?
If you do not know the month, please select the season.

default version
Select Month or Season | Select Year | To enter your age instead, click here. | CHECK: Please enter a date before today.
alternate version
15 – 44 Age | To enter month and year instead, click here. | CHECK: Please enter an age from 15 to [RAGE - CURRENT AGE].

OS70G_M. (CATI) FU Member: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
In what month and year, or at what age, did [FEMALE: you / MALE: your partner] most recently begin receiving Depo-Provera shots or other contraceptive injections?
- SELECT Month
- Or PRESS [Enter] to record Age
- If needed: Please tell me about the most recent time.
- PROBE DK month: Do you know what season it was?

<table>
<thead>
<tr>
<th>Month</th>
<th>Year</th>
<th>DK/RF</th>
</tr>
</thead>
</table>
GO TO OS70G_AGE


O 93. In [OS70F_M], [OS70F_Y] when first received a Depo-Provera shot (SP_0e)

GO TO J32CKPT

OS70G_Y. (CATI) FU Member: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

(In what year did [FEMALE: you / MALE: your partner] most recently receive a Depo-Provera shot or other contraceptive injection?)

The month entered is: [OS70G_M]

- ENTER Year
- If R reports an age, GO BACK to OS70G_M and PRESS [Delete] - then PRESS [Enter] to record Age
- If needed: Please tell me about the most recent time.


GO TO J32CKPT

OS70G_AGE. (CATI) FU Member: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

[ALL OTHERS]: How old [FEMALE: were you / MALE: was your partner] when [FEMALE: you / MALE: your partner] most recently received a Depo-Provera shot or other contraceptive injection?

- If needed: Please tell me about the most recent time.

15-44 O 92. Age [OS70F_AGE] when first received a contraceptive injection (SP_0f)

GO TO J32CKPT

CHECK: Please enter an age from 15 to [RAGE - CURRENT AGE].

(WEB) OS70G_Y, OS70G_M, OS70G_AGE. When did [FEMALE: you / MALE: your partner] MOST RECENTLY receive a Depo-Provera shot or other contraceptive injection?

If you do not know the month, please select the season.

default version
Select Month or Season Select Year To enter your age instead, click here.
CHECK: Please enter a date before today.

O 93. In [OS70F_M], [OS70F_Y] when first received contraceptive injection (SP_0e)

alternate version

15 – 44 Age To enter month and year instead, click here.
CHECK: Please enter an age from 15 to [RAGE-CURRENT AGE].

O 92. Age [OS70F_AGE] when first received contraceptive injection (SP_0f)

OS70H_M. (CATI) FU Member: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

In what month and year, or at what age, did [FEMALE: you / MALE: your partner] receive a Norplant or other hormonal implant for the first time?

- SELECT Month
- Or PRESS [Enter] to record Age
- If needed: Please tell me about the first time.
- PROBE DK month: Do you know what season it was?

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

OS70H_Y. (CATI) FU Member: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

In what year did [FEMALE: you / MALE: your partner] receive a Norplant or other hormonal implant for the first time?

- The month entered is: [OS70H_M]
- ENTER Year
- If R reports an age, GO BACK to OS70H_M and PRESS [Delete] - then PRESS [Enter] to record Age
- If needed: Please tell me about the first time.


OS70H_AGE. (CATI) FU Member: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

[(OS70G_Y=DK/RF: Could you tell me how old [FEMALE: you were / MALE: your partner was] / ALL OTHERS: How old [FEMALE: were you / MALE: was your partner] when [FEMALE: you / MALE: your partner] received a Norplant or other hormonal implant for the first time?)

- If needed: Please tell me about the first time.

15 – 44 CHECK: Please enter an age from 15 to [RAGE-CURRENT AGE].

OS70J_M. (WEB) OS70H_Y, OS70H_M, OS70H_AGE. When did [FEMALE: you / MALE: your partner] receive a Norplant or other hormonal implant for the FIRST time?
If you do not know the month, please select the season.

default version

Select Month or Season Select Year To enter your age instead, click here.

CHECK: Please enter a date before today.

alternate version

15 – 44 Age To enter month and year instead, click here.

CHECK: Please enter an age from 15 to [RAGE-CURRENT AGE].

OS70J_M. (CATI) FU Member: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

In what month and year, or at what age, did [FEMALE: you / MALE: your partner] most recently begin receiving a Norplant or other hormonal implant?

- SELECT Month
- Or PRESS [Enter] to record Age
- If needed: Please tell me about the most recent time.
- PROBE DK month: Do you know what season it was?

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

O 93. In [OS70H_M], [OS70H_Y] when first received a Norplant (SP_0e)

GO TO J32CKPT
OS70J_Y. (CATI) FU Member: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [Respondent]

(Respondent)

(In what year did [FEMALE: you / MALE: your partner] most recently begin receiving a Norplant or other hormonal implant?)

The month entered is: [OS70J_M]

- ENTER Year
- If R reports an age, GO BACK to OS70J_M and PRESS [Delete] - then PRESS [Enter] to record Age
- If needed: Please tell me about the most recent time.


GO TO J32CKPT

OS70J_AGE. (CATI) FU Member: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE]

(Respondent)

([OS70J_Y=DK/RF: Could you tell me how old [FEMALE: you were / MALE: your partner was] / ALL OTHERS: How old [FEMALE: were you / MALE: was your partner] when [FEMALE: you / MALE: your partner] most recently began receiving a Norplant or other hormonal implant?]

- If needed: Please tell me about the most recent time.

15-44 o 92. [OS70H_AGE] when first received a Norplant (SP_0f)

GO TO J32CKPT

CHECK: Please enter an age from 15 to [RAGE-CURRENT AGE].

(WEB) OS70J_Y, OS70J_M, OS70J_AGE. When did [FEMALE: you / MALE: your partner] MOST RECENTLY receive a Norplant or other hormonal implant?

If you do not know the month, please select the season.

To enter your age instead, click here.

Os70k. (CATI) FU Member: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [Respondent]

What is the reason you are not using any contraception method?

- ENTER all that apply

1. R does not expect to have sex at all
2. R does not have sex very often
3. R does not think they can [R=FEMALE: become pregnant / R=MALE: have children]
4. R doesn’t really mind or wants to [R=FEMALE: get become pregnant / R=MALE: have children]
5. R is worried about the side effects of birth control
6. R could not get any contraception or preferred contraception
7. R forgets to use it or doesn’t use it all the time

8. R
What is the reason that you are not using any contraception method? Please select all that apply.

1. You do not expect to have sex at all
2. You don’t have sex very often
3. You do not think you can [R=FEMALE: become pregnant/R=MALE: have children]
4. You don’t really mind or want to [R=FEMALE: become pregnant/R=MALE: have children]
5. You are worried about the side effects of birth control
6. You could not get any contraception or preferred contraception
8. You forget to use it or don’t use it all the time
9. You were told by a doctor that you cannot [R=FEMALE: become pregnant/R=MALE: have children]
7. Other – Please specify: (OS70KSPEC. Specify (String 100))

End PREGINTENTION

Adoptive Children

J32CKPT. CAI Checkpoint: J1CKPT Type

1. Type A (J1CKPT=1)
2. Type B (J1CKPT=3, 4)
3. Type C: RP (SP) (J1CKPT=6, 7, 11, 12)
4. Type C: OFUM (J1CKPT=9, 14, 16)

GO TO J34 GO TO J1 END RULE

J33. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
[TYPE A: [Have you or [[REFERENCE PERSON] / [SPOUSE-PARTNER]] / Has [REFERENCE PERSON] or [SPOUSE-PARTNER]]] / TYPE B: [Have you / Has [REFERENCE PERSON] / Has [SPOUSE-PARTNER]] legally adopted any children since January [P2YEAR]?
1. Yes 5. No

(WEB) [TYPE A: [Have you or [[REFERENCE PERSON] / [SPOUSE-PARTNER]] / Has [REFERENCE PERSON] or [SPOUSE-PARTNER]]] / TYPE B: [Have you / Has [REFERENCE PERSON] / Has [SPOUSE-PARTNER]] LEGALLY adopted any children since January [P2YEAR]?
1. Yes 5. No

J34. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
[Have you / Has [REFERENCE PERSON] / Has [SPOUSE-PARTNER]] ever legally adopted any children?
1. Yes 5. No

(WEB) [Have you / Has [REFERENCE PERSON] / Has [SPOUSE-PARTNER]] ever LEGALLY adopted any children?
1. Yes 5. No
J35. [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

How many [TYPE A, B: is that / TYPE C: altogether]?

1 – 97 DK/RF → GO TO SECTION J END RULE

GO TO J36

(WE) How many [TYPE A, B: is that / TYPE C: altogether]?

1 – 97 Children NA → GO TO SECTION J END RULE

GO TO J36

SECTION_J[1..24].J36NAME[1..20] [1..24]=AQSN of FU Member; [1..20]=Which child

J36, J36NAMM, J36NAML. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

What is [this / the [first / next]] child’s name, including middle and last names?
- ENTER First Name
- Ctrl-D and Ctrl-R not allowed; For DK/RF, type [DK] or [RF]

String 25

(What is [this / the [first / next]] child’s name, including middle and last names?)
- ENTER Middle Name
- Ask for Middle Name but do not probe DK or RF
- If none, PRESS [Enter] to continue
- Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 25

(WE) What is [this / the [first / next]] child’s name?

If you prefer not to enter this child’s name, please enter a nickname or anything that will identify this child to you.

First Name String 25
Middle Name String 25
Last Name String 25

AS1 RULE: Number of Children at J35

More Children → REPEAT J36 - J36NAML; Max=20; No More Children
Then GO TO AS1

End J36NAME

SECTION_J[1..24].AS1_AS9[1..15] [1..24]=AQSN of FU Member; [1..15]=Which child

AS1. (CATI) [J36 NAME] CHILD OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

Let’s talk about [J36] [J36NAML]. (We can’t always tell from a name. Is that a male or a female?)

1. Male 2. Female

(WE) [J35>1: These next questions are about [[J36] [J36NAML] / the [first / next] child].

Is [[J36] [J36NAML] / this child] ...?

1. Male 2. Female
What is [J36]'s [[J36NAML]] full birthdate?

Select

1. January
2. February
3. March
4. April
5. May
6. June
7. July
8. August
9. September
10. October
11. November
12. December
21. Winter (Dec-Feb)
22. Spring (Mar-May)
23. Summer (Jun-Aug)
24. Fall (Sep-Nov)

The month entered is: [AS2MO]

Enter day

1 – 31

The month entered is: [AS2MO]

Enter the year below

1901 – [CYEAR]

0 9996. [P2YEAR]-[CYEAR] but don’t know which year (SP_0B)
0 9997. Before [P2YEAR] but don’t know exact year (SP_0A)

SIGNAL for J33=Yes & AS2YR<P2YEAR or 9997: Years prior to [P2YEAR] are not allowed since we are asking about children adopted since [PYIWDATE]. Please VERIFY child’s year of birth.

WEB What is [J36]’s [[J36NAML]] / this child’s birthdate?

Please remember that all of your responses are confidential.

Select

Month or Season
1. January
2. February
3. March
4. April
5. May
6. June
7. July
8. August
9. September
10. October
11. November
12. December
21. Winter (Dec-Feb)
22. Spring (Mar-May)
23. Summer (Jun-Aug)
24. Fall (Sep-Nov)

Day
1 – 31

Year
1901 – [CYEAR]

0 9996. [P2YEAR]-[CYEAR] but don’t know which year (SP_0B)
0 9997. Before [P2YEAR] but don’t know exact year (SP_0A)

CHECK: Please enter a date before today.

CHECK for JICKPT=TYPE A, B & AS2YR<P2YEAR: Please enter a year from [P2YEAR] to [CYEAR].
472. Sister-in-law

(Web) What was [his/her] relationship to [Type A: you and [[Reference Person] / [Spouse/Partner]] / [Reference Person] and [Spouse/Partner]] / Type B, C: [you / [Reference Person] / [Spouse/Partner]] before the adoption?

Select Relationship

- 96. None
- 301. Son
- 302. Daughter
- 311. Stepson
- 312. Stepdaughter
- 381. Foster son
- 382. Foster daughter
- 401. Brother
- 402. Sister
- 471. Brother-in-law
- 472. Sister-in-law
- 481. Brother of Partner
- 482. Sister of Partner
- 601. Grandson
- 602. Granddaughter
- 651. Great-grandson
- 652. Great-granddaughter
- 701. Nephew of [Reference Person]
- 702. Niece of [Reference Person]
- 711. Nephew of Spouse
- 712. Niece of Spouse
- 741. Cousin of [Reference Person]
- 751. Cousin of Spouse
- 831. Son of Boyfriend/Girlfriend
- 832. Daughter of Boyfriend/Girlfriend
- 951. Relative of [Reference Person]
- 961. Relative of Spouse
- 971. Relative of Partner

AS4COUNTRY (AS4CTRYNAME), AS4TOWN, AS4STATE (AS4STABBR).

(CATI) [J36 NAME] CHILD OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

Where was [he/she] ([J36] [J36NAML]) born? (In what country was [he/she] born?)
- Enter 185 United States for Puerto Rico, U.S. Virgin Islands, Guam, American Samoa or the Northern Marianas Islands

Select 1 – 193 (Defaults to 185/US)

In what city was [he/she] born?
- For Don't Know, Enter [Ctrl D]
- For Refusal, Enter [Ctrl R]

String 25

(In what state (of the U.S.) was that?) (For COUNTRY=185)
Select 1 – 57 (Assigned 57/FC if Country<>185)

(Web) Where was [[J36] [[J36NAML]] / this child] born?

Country
- Select 1 – 193 (Defaults to 185/US)

United States includes Puerto Rico, U.S. Virgin Islands, Guam, American Samoa and the Northern Marianas Islands

City
State

ASS. (CATI ONLY) [J36 NAME] CHILD OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

Is [[J36] [[J36NAML]] living with you now, away with [his/her] [[J2=FEMALE: father / J2=MALE: 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

GO TO AS7

ASSA_W. (WEB ONLY) Where is [[J36] [[J36NAML]] / this child] now?

1. Living here with this family
2. Living somewhere else
3. Passed away; died
4. Other - Please specify: (AS5ASPEC) NA

GO TO AS5B_W

GO TO AS6MO
GO TO AS7

AS5B_W. (WEB ONLY) With whom is [[J36] ((J36NAML)) / this child] living?

1. [His / Her / Their] father
2. [His / Her / Their] mother
3. Another relative
4. On [his / her / their] own, in a separate household
5. A foster family
6. Other - Please specify: (AS5BSPEC)

GO TO AS7

AS6MO, AS6YR. (CATI) [J36 NAME] CHILD OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

We are very sorry for your loss. 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?

Select

1. January
2. February
3. March
4. April
5. May
6. June
7. July
8. August
9. September
10. October
11. November
12. December
21. Winter (Dec-Feb)
22. Spring (Mar-May)
23. Summer (Jun-Aug)
24. Fall (Sep-Nov)

The month entered is: [AS6MO]

- ENTER the year below

1901 – [CYEAR]

○ 9996. [P2YEAR]-[CYEAR] but don’t know which year (SP_0B)
○ 9997. Before [P2YEAR] but don’t know exact year (SP_0A)

GO TO AS10 RULE

(WEB) We are very sorry for your loss.

If you do not know the month, please select the season.

Select

Month or Season
1. January
2. February
3. March
4. April
5. May
6. June
7. July
8. August
9. September
10. October
11. November
12. December
21. Winter (Dec-Feb)
22. Spring (Mar-May)
23. Summer (Jun-Aug)
24. Fall (Sep-Nov)

1901 – [CYEAR]

○ 9996. [P2YEAR]-[CYEAR] but don’t know which year (SP_0B)
○ 9997. Before [P2YEAR] but don’t know exact year (SP_0A)

CHECK: Please enter a date before today.

GO TO AS10 RULE

AS7. (CATI) [J36 NAME] CHILD OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

Is [he / she] Spanish, Hispanic, or Latino? That is, Mexican, Mexican American, Chicano, Puerto Rican, Cuban, or other Spanish?

0. Not Spanish/Hispanic
1. Mexican
2. Mexican American
3. Chicano
4. Puerto Rican
5. Cuban
7. Other-specify (AS7SPEC. Specify (String 100))

(WEB) What are [[J36]’s ([J36NAML]) / this child’s] Hispanic, Latino or Spanish origins or background?

0. None, not Spanish, Hispanic, or Latino
1. Mexican
2. Mexican American
3. Chicano
4. Puerto Rican
5. Cuban
7. Other - Please specify: (OS7SPEC)

AS8. (CATI) [J36 NAME] CHILD OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
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?

1. White
2. Black, African-American
3. American Indian or Alaska Native
4. Asian
5. Native Hawaiian
6. Pacific Islander
7. Other-specify (AS8SPEC. Specify (String 100))

GO TO AS10 RULE

(WEB) What is [[J36]’s ([J36NAML]) / this child’s] race?

Please select all that apply.

1. White
2. Black, African-American
3. American Indian or Alaska Native
4. Asian
5. Native Hawaiian
6. Pacific Islander
7. Other - Please specify: (AS8SPEC)

GO TO AS10 RULE

AS8A. (CATI) [J36 NAME] CHILD OF: [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] ([Respondent])

Would that be Chinese, Filipino, Asian Indian, or what?

1. Chinese
2. Filipino
3. Asian Indian
4. Japanese
5. Korean
6. Vietnamese
7. Other-specify (AS8ASPEC. Specify (String 100))

(WEB) What are [[J36]’s ([J36NAML]) / this child’s] specific Asian origins or background?

1. Chinese
2. Filipino
3. Asian Indian
4. Japanese
5. Korean
6. Vietnamese
7. Other - Please specify: (AS8ASPEC)

AS10 RULE: Whether More Children at J36

More Children → REPEAT AS1 - AS8A; Max=20;
No More Children
Then GO TO SECTION J END RULE

End AS1_AS9

SECTION J END RULE: Whether More Eligible FU Members

More FU Members → REPEAT SECTION J; Max=24;
No More FU Members
Then GO TO SECTION KL
GO TO SECTION KL

End SECTION_J
Section KL: Background; Continuing Education

SECTION_KL


<table>
<thead>
<tr>
<th>Full Section KL</th>
<th>Section KL Education Update Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Spouse-Partner</td>
<td>3. Spouse-Partner</td>
</tr>
<tr>
<td>a. Preloaded SP needs full KL</td>
<td>(Preloaded SP:</td>
</tr>
<tr>
<td>(IWTYPE=REINT, RECON, SO, RECSO &amp; CYFUHU=FU &amp; CYAQRTH=201-222 &amp; PYAQRTH=101-222 &amp; CYAQRTH=101-222 &amp; KLTYPE=1)</td>
<td>IWTYPE=REINT, RECON, SO, RECSO &amp; CYFUHU=FU &amp; CYAQRTH=101-102 &amp; PYAQRTH=101-22 &amp; KLTYPE=1)</td>
</tr>
<tr>
<td>b. New SP preloaded as OFUM</td>
<td>b. New RP preloaded as OFUM</td>
</tr>
<tr>
<td>(IWTYPE=REINT, RECON &amp; CYFUHU=FU &amp; CYAQRTH=201-222 &amp; PYAQRTH=101-222)</td>
<td>(IWTYPE=REINT, RECON &amp; CYFUHU=FU &amp; CYAQRTH=101-102 &amp; PYAQRTH=101-222)</td>
</tr>
<tr>
<td>c. New SP moved-in (IWTYPE=REINT, RECON &amp; CYFUHU=FUMI &amp; CYAQRTH=201-222)</td>
<td>c. New RP moved-in (IWTYPE=REINT, RECON &amp; CYFUHU=FUMI &amp; CYAQRTH=101-102)</td>
</tr>
<tr>
<td>2. Reference Person</td>
<td>4. Reference Person</td>
</tr>
<tr>
<td>a. Preloaded RP needs full KL</td>
<td>(Preloaded RP:</td>
</tr>
<tr>
<td>b. New RP preloaded as OFUM</td>
<td>b. New RP preloaded as OFUM</td>
</tr>
<tr>
<td>(IWTYPE=REINT, RECON &amp; CYFUHU=FU &amp; CYAQRTH=101-102 &amp; PYAQRTH=101-222)</td>
<td>(IWTYPE=REINT, RECON &amp; CYFUHU=FU &amp; CYAQRTH=101-102 &amp; PYAQRTH=101-222 &amp; KLTYPE=2)</td>
</tr>
<tr>
<td>c. New RP moved-in (IWTYPE=REINT, RECON &amp; CYFUHU=FUMI &amp; CYAQRTH=101-102)</td>
<td>c. New RP moved-in (IWTYPE=REINT, RECON &amp; CYFUHU=FUMI &amp; CYAQRTH=101-102)</td>
</tr>
</tbody>
</table>

GO TO KL74


LINENUM. AQSNI of Spouse-Partner (Reference Person). Assigned.

Father

KL2COUNTRY (KL2CTRYNAME), KL2CITY, KL2STATE (KL2STABBR).

(CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

Now I have some questions about [your / [SPOUSE-PARTNER]’s / [REFERENCE PERSON]’s] family and past experiences. Where was [your / her / his] father born? (What Country is that in?)

► If [R/SP] does not have a known father, PROBE: By “father” we mean biological father, stepfather, or male guardian.

• ENTER [185 UNITED STATES] for Puerto Rico, U.S. Virgin Islands, Guam, American Samoa or the Northern Mariana Islands

Select ▼ 1 – 193 (Defaults to 185/US)

(What City is that in?)

String 25

(What State is that in?) (For COUNTRY=185)

Select ▼ 1 – 57 (Assigned 57/FC if Country<>185)

(WEB) Now I have some questions about [your / [SPOUSE-PARTNER]’s / [REFERENCE PERSON]’s] family and past experiences. Where was [your / her / his] father born?

By “father” we mean biological father, stepfather, or male guardian.

Country

United States includes Puerto Rico, U.S. Virgin Islands, Guam, American Samoa and the Northern Mariana Islands

Select ▼ 1 – 193 (Defaults to 185/US)

City

String 25

State

Select ▼ 1 – 57 (Assigned 57/FC if Country<>185)
KL3COUNTRY (KL3CTRYNAME), KL3CITY, KL3STATE (KL3STABBR).

(CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
Where did [your / her / his] father grow up? (What Country is that in?)
- Most of the years from ages 6 to 16
- ENTER [185 UNITED STATES] for Puerto Rico, U.S. Virgin Islands, Guam, American Samoa or the Northern Mariana Islands

Select 1 – 193 (Defaults to 185/US)
(What City is that in?)
String 25
(What State is that in?) (For COUNTRY=185)
Select 1 – 57 (Assigned 57/FC if Country<>185)

WEB) Where did [your / her / his] father grow up?
Please tell us where he grew up for most of the years between the ages of 6 and 16.

Country
Select 1 – 193 (Defaults to 185/US)
United States includes Puerto Rico, U.S. Virgin Islands,
Guam, American Samoa and the Northern Mariana Islands
City
State

KL4. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
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
4. Both in the United States and outside the United States
5. Had no education

WEB) Where did [your / her / his] father receive his education?

1. United States only
2. Outside United States only
3. Both in the United States and outside the United States
4. Both in the United States and outside the United States
5. Had no education

KL5. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
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

WEB) 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 or an Associate’s Degree (AA))
7. 15 - 16 years (college or a Bachelor’s Degree (BA, BS))
8. 17 or more years (college, graduate work, a Master’s Degree (MA, MS, MBA) or Doctorate (PhD), or a professional degree (LLB, JD, MD, DDS, DVM, DO)

GO TO KL7CKPT

KL5 SIGNAL. *(CATI ONLY)* 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, or
  - 8. 17 or more years - a graduate degree, Ph.D, or professional degree? DK/RF

GO TO KL7CKPT

KL6. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
Could he read and write (in English)?

1. Yes  5. No

*(WEB)* Could he read and write in English?

1. Yes  5. No

KL7CKPT. CAI Checkpoint: Whether SP/RP’s Father Educated Outside U.S.

1. Outside U.S. (KL4=2, 3)  5. All Others (KL4=1, 5, DK, RF, NA) → GO TO KL10

KL8. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
How many years of school did he complete outside of the U.S.?

1 – 97

*(WEB)* How many years of school did he complete outside of the United States?

1 – 97  Number of years

CHECK: Please enter a number from 1 to 97.

KL9. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
What was the highest degree or certificate he earned outside the U.S.?

String 100

*(WEB)* What was the highest degree or certificate he earned outside the United States?

String 100

KL10. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
What was [your / her / his] father’s usual occupation when [you were / she was / he was] growing up? What kind of work did he do? What were his most important activities or duties?

- **DO NOT PROBE**

String 500

*(WEB)* What was [your / her / his] father’s usual occupation when [you were / she was / he was] growing up? What kind of work did he do? What were his most important activities or duties?
KL11. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

What kind of business or industry was that in?

- DO NOT PROBE

(WEB) What kind of business or industry was that in?

String 500

Mother

KL12COUNTRY (KL12CTRYNAME), KL12CITY, KL12STATE (KL12STABBR). (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

These next questions are about [your / [SPOUSE-PARTNER]’s / [REFERENCE PERSON]’s] mother. Where was [your / her / his] mother born? (What Country is that in?)

- If [RP/SP] does not have a known mother, PROBE: By “mother” we mean biological mother, stepmother, or female guardian.
- ENTER [185 UNITED STATES] for Puerto Rico, U.S. Virgin Islands, Guam, American Samoa or the Northern Mariana Islands

Select ▼ 1 – 193 (Defaults to 185/US)

(WEB) These next questions are about [your / her / his] mother. Where was [your / her / his] mother born? By “mother” we mean biological mother, stepmother, or female guardian.

Country Select ▼ 1 – 193 (Defaults to 185/US)

United States includes Puerto Rico, U.S. Virgin Islands, Guam, American Samoa and the Northern Mariana Islands

City

State

Select ▼ 1 – 57 (Assigned 57/FC if Country<>185)

KL13COUNTRY (KL13CTRYNAME), KL13CITY, KL13STATE (KL13STABBR). (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

Where did [your / her / his] mother grow up? (What Country is that in?)

- Most of the years from ages 6 to 16
- ENTER [185 UNITED STATES] for Puerto Rico, U.S. Virgin Islands, Guam, American Samoa or the Northern Mariana Islands

Select ▼ 1 – 193 (Defaults to 185/US)

(WEB) Where did [your / her / his] mother grow up?

Please tell us where she grew up for most of the years between the ages of 6 and 16.

Country Select ▼ 1 – 193 (Defaults to 185/US)
**United States includes Puerto Rico, U.S. Virgin Islands, Guam, American Samoa and the Northern Mariana Islands**

City
State

**KL14. (CATI)** [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

Where did [your / her / his] mother receive her education - in the United States, outside the United States, or both?

1. United States only
2. Outside U.S. only
3. Both in U.S. and outside
4. Had no education

**WEB** Where did [your / her / his] mother receive her education?

1. United States only
2. Outside United States only
3. Both in the United States and outside the United States
4. Had no education

**KL15. (CATI)** [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

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

**WEB** 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

**KL15 SIGNAL. (CATI ONLY) 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, or
8. 17 or more years - a graduate degree, Ph.D, or professional degree?

**KL16. (CATI)** [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

Could she read and write (in English)?

1. Yes
5. No

**WEB** Could she read and write in English?
KL17CKPT. CAI Checkpoint: Whether SP/RP’s Mother Educated Outside U.S.

1. Outside U.S. (KL14=2, 3)  5. All Others (KL14=1, 5, DK, RF, NA) → GO TO KL20

KL18. [CATI] [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
How many years of school did she complete outside of the U.S.?
1 – 97
(WEB) How many years of school did she complete outside of the United States?
1 – 97  Number of years
CHECK: Please enter a number from 1 to 97.

KL19. [CATI] [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
What was the highest degree or certificate she earned outside the U.S.?
String 100
(WEB) What was the highest degree or certificate she earned outside the United States?
String 100

KL20. [CATI] [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
What was [your / her / his] mother’s usual occupation when [you were / she was / he was] growing up? What kind of work did she do? What were her most important activities or duties?
• DO NOT PROBE
String 500
(WEB) What was [your / her / his] mother’s usual occupation when [you were / she was / he was] growing up? What kind of work did she do? What were her most important activities or duties?
String 500

KL21. [CATI] [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
What kind of business or industry was that in?
• DO NOT PROBE
String 500
(WEB) What kind of business or industry was that in?
String 500

Siblings

KL22. [CATI] [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
Now I have some questions about brothers and sisters. Did [you / [SPOUSE-PARTNER] / [REFERENCE PERSON]] have any brothers?
• INCLUDE biological siblings (full or half) only
1. Yes  5. No → GO TO KL28
GO TO KL23
(WEB) Did [you / [SPOUSE-PARTNER] / [REFERENCE PERSON]] have any brothers?
Please include half-brothers; do NOT include step-brothers or adopted brothers.
1. Yes 5. No → GO TO KL23

**SIGNAL for NA:** This information is important. Please select a response.

**KL23. (CATI)** [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

How many brothers was that?

| 1 | 2 – 97 | DK/RF | → GO TO KL28  
|---|---|---|---|

GO TO KL24  GO TO KL26

(‡WEB) How many brothers was that?

| 1 | 2 – 97 | Number of brothers | NA | → GO TO KL28  
|---|---|---|---|

GO TO KL24  GO TO KL26

**CHECK:** Please enter a number from 1 to 97.

**KL24. (CATI)** [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

Is [your / her / his] brother still living?

1. Yes 5. No

(‡WEB) Is [your / her / his] brother still living?

1. Yes 5. No

**KL25. (CATI)** [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

|---|---|

GO TO KL28

(‡WEB) [KL24=Yes: Is / ALL OTHERS: Was he older than [you / [SPOUSE-PARTNER] / [REFERENCE PERSON]]?]

1. Yes 5. No

GO TO KL28

**KL26. (CATI)** [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

How many of them are still living?

0 – [[KL23] / 97]

(‡WEB) How many of [your / her / his] brothers are still living?

0 – [[KL23] / 97]  

**CHECK:** Please enter a number from 0 to [KL23].

**KL27. (CATI)** [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

<table>
<thead>
<tr>
<th>KL26&gt;0: Are / ALL OTHERS: Were any of [your / her / his] brothers older than [you are / she is / he is]?</th>
<th>1. Yes 5. No</th>
</tr>
</thead>
</table>

(‡WEB) [KL26>0: Are / ALL OTHERS: Were any of [your / her / his] brothers older than [you / her / him]?]

1. Yes 5. No
Did [you / [SPOUSE-PARTNER] / [REFERENCE PERSON]] have any sisters?

- INCLUDE biological siblings (full or half) only

1. Yes  
5. No  → GO TO KL33COUNTRY

GO TO KL29

WEB) Did [you / [SPOUSE-PARTNER] / [REFERENCE PERSON]] have any sisters?

Please include half-sisters; do NOT include step-sisters or adopted sisters.

1. Yes  
5. No  → GO TO KL33COUNTRY

GO TO KL29

SIGNAL for NA: This information is important. Please select a response.

KL29. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

How many sisters was that?

1  
2 – 97  
DK/RF  → GO TO KL33COUNTRY

GO TO KL30  GO TO KL32

WEB) How many sisters was that?

1  
2 – 97  
Number of sisters  NA  → GO TO KL33COUNTRY

GO TO KL30  GO TO KL32

CHECK: Please enter a number from 1 to 97.

KL30. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

Is [your / her / his] sister still living?

1. Yes  
5. No

WEB) Is [your / her / his] sister still living?

1. Yes  
5. No

KL31. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]


1. Yes  
5. No

WEB) [KL30=Yes: Is / ALL OTHERS: Was] she older than [you / [SPOUSE-PARTNER] / [REFERENCE PERSON]]?

1. Yes  
5. No

GO TO KL33COUNTRY

KL32. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

How many of them are still living?

0 – [|KL29| / 97]

WEB) How many of [your / her / his] sisters are still living?

0 – [|KL29| / 97]  
Number of sisters

CHECK: Please enter a number from 0 to [KL29].
KL33. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

[KL32>0: Are / ALL OTHERS: Were] any of [your / her / his] sisters older than [you are / she is / he is]?

1. Yes 5. No

(WEB) [KL32>0: Are / ALL OTHERS: Were] any of [your / her / his] sisters older than [you / her / him]?

1. Yes 5. No

Birthplace & Growing Up

KL33COUNTRY (KL33CTRYNAME), KL33CITY, KL33STATE (KL33STABBR).

(CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

Where [were you / was [SPOUSE-PARTNER] / was [REFERENCE PERSON]] born? (What Country is that in?)

- ENTER [185 UNITED STATES] for Puerto Rico, U.S. Virgin Islands, Guam, American Samoa or the Northern Mariana Islands

Select ▼ 1 – 193 (Defaults to 185/US)

(What City is that in?)

String 25

(What State is that in?) (For COUNTRY=185)

Select ▼ 1 – 57 (Assigned 57/FC if Country<>185)

(WEB) Where [were you / was [SPOUSE-PARTNER] / was [REFERENCE PERSON]] born?

Country

Select ▼ 1 – 193 (Defaults to 185/US)

United States includes Puerto Rico, U.S. Virgin Islands, Guam, American Samoa and the Northern Mariana Islands

City

String 25

State

Select ▼ 1 – 57 (Assigned 57/FC if Country<>185)

KL33YEAR RULE: Place of Birth

<table>
<thead>
<tr>
<th>Born Outside US States/DC</th>
<th>Born in US State/DC</th>
</tr>
</thead>
<tbody>
<tr>
<td>(KL33COUNTRY=185 &amp; KL33STATE=52-56; or KL33STATE=57; or KL33COUNTRY=1-184, 186-193)</td>
<td>(KL33COUNTRY=185 &amp; KL33STATE=1-51, DK, RF, NA ; or KL33COUNTRY=DK, RF, NA)</td>
</tr>
</tbody>
</table>

GO TO KL34

KL33YEAR. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

In what year did [you / she / he] come to live in the [KL33STATE=52-56: mainland] United States? [KL33CITY], [KL33STATE], [KL33COUNTRY]

- ENTER Year
- If needed, PROBE for the most recent time [[SPOUSE-PARTNER] / [REFERENCE PERSON]] came to live in the U.S.

1901 – [CYEAR] 0 9997. Not currently living in [KL33STATE=52-56: mainland] United States (VOL) (SP_0A)

(WEB) In what year did [you / she / he] most recently come to live in the [KL33STATE=52-56: mainland] United States?

1901 – [CYEAR] Year

0 9997. Not currently living in [KL33STATE=52-56: mainland] United States (SP_0A)

CHECK: Please enter a year from [CYRBRN] to [CYEAR].
KL34. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
Did [you / [SPOUSE-PARTNER] / [REFERENCE PERSON]] 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))

(WEB) Did [you / [SPOUSE-PARTNER] / [REFERENCE PERSON]] grow up ...?
1. On a farm or in the country  2. In a small town or suburb  3. In a large city
4. Somewhere else - Please specify: (KL34SPEC)

KL35COUNTRY (KL35CTRYNAME), KL35STATE (KL35STABBR), KL35COUNTY, KL35CITY.
(CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
In what Country was that?
• ENTER [185 UNITED STATES] for Puerto Rico, U.S. Virgin Islands, Guam, American Samoa or the Northern Mariana Islands
Select ▼  1 – 193 (Defaults to 185/US)
In what state (of the U.S.) was that? (For COUNTRY=185)
Select ▼  1 – 57 (Assigned 57/FC if Country<>185)
Can you tell me what County that was?
String 25 → GO TO KL36  DK/RF

What was the name of the nearest town or city?
String 25

(WEB) Where was that?
Country
Select ▼  1 – 193 (Defaults to 185/US)
United States includes Puerto Rico, U.S. Virgin Islands, Guam, American Samoa and the Northern Mariana Islands
State
Select ▼  1 – 57 (Assigned 57/FC if Country<>185)
County
String 25  For Country=185(US) only
City
String 25  For Country=185(US) only

KL36. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
[Have you / Has [SPOUSE-PARTNER] / Has [REFERENCE PERSON]] lived in any other states or countries besides where [you are / she is / he is] currently living and where [you / she / he] grew up, including time spent abroad while in the armed forces?
• “LIVED IN” means stayed at least 3 months
1. Yes  5. No

(WEB) [Have you / Has [SPOUSE-PARTNER] / Has [REFERENCE PERSON]] lived for 3 months or more in any other U.S. state or any other countries besides where [you are / she is / he is] currently living and where [you / she / he] grew up, including time spent abroad while in the armed forces?
1. Yes  5. No
Were your / [SPOUSE-PARTNER]'s / [REFERENCE PERSON]'s parents poor when you were / she was / he was growing up, pretty well off, or what?
1. Poor
3. Average; it varied
5. Pretty well off

WEB: Were you / Was she / Was he growing up, were your / [SPOUSE-PARTNER]'s / [REFERENCE PERSON]'s parents...?
1. Poor
3. Average or it varied
5. Pretty well off

Were you / Was she / Was he living with both your / her / his natural parents most of the time until you were / she was / he was age 16?
1. Yes
5. No

WEB: Were you / Was she / Was he living with both your / her / his parents most of the time until you were / she was / he was age 16?
This includes biological and adoptive parent; it does not include step-parents.
1. Yes
5. No

Race and Ethnicity

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 / [SPOUSE-PARTNER]'s / [REFERENCE PERSON]'s background. Are you / Is she / Is he Spanish, Hispanic, or Latino? That is, Mexican, Mexican American, Chicano, Puerto Rican, Cuban, or other Spanish?
0. Not Spanish/Hispanic
1. Mexican
2. Mexican American
3. Chicano
4. Puerto Rican
5. Cuban
7. Other - specify (KL39SPEC. Specify (String 100))

WEB: What is your / [SPOUSE-PARTNER]'s / [REFERENCE PERSON]'s Hispanic, Latino or Spanish origins or background?
0. None, not Spanish, Hispanic, or Latino
1. Mexican
2. Mexican American
3. Chicano
4. Puerto Rican
5. Cuban
7. Other - Please specify: (KL39SPEC)

What is your / her / his race? Are you / Is she / Is he white, black, American Indian, Alaska Native, Asian, Native Hawaiian, or Pacific Islander?
- ENTER all that apply
- PROBE: Any others?

1. White
2. Black, African-American
3. American Indian or Alaska Native
4. Asian
5. Native Hawaiian
6. Pacific Islander
7. Other race - specify (KL40SPEC. Specify (String 100))

WEB: What is your / her / his race?
Please select all that apply.
1. White
2. Black, African-American
3. American Indian or Alaska Native
4. Asian
5. Native Hawaiian
6. Pacific Islander
7. Other race - Please specify: (KL40SPEC)

KL40A. *(CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
Would that be Chinese, Filipino, Asian Indian, or what?
7. Other Asian-specified (KL40ASPEC. Specify (String 100))

*(WEB) What are [your / her / his] specific Asian origins or background?
7. Other - *Please specify:* (KL40ASPEC)

KL41. *(CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
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?)
• IF R reports a State in the U.S., ENTER [America]

String 200

*(WEB) What is [your / her / his] ancestry or ethnic origin? From what country or part of the world did [your / her / his] ancestors come from?
Please enter all countries or parts of the world that apply.
String 200

Military Service

KL42. *(CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
Have you / Has she / Has he ever been in the United States military service?
1. Yes  5. No

*(WEB) Have you / Has she / Has he ever been in the United States military service?
1. Yes  5. No

Education

KL43. *(CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
Where did [you / SPOUSE-PARTNER / REFERENCE PERSON] receive [your / her / his] education — in the United States, outside the United States, or both?

GO TO KL44  GO TO KL59CKPT  GO TO KL44  GO TO KL59CKPT

*(WEB) Where did [you / SPOUSE-PARTNER / REFERENCE PERSON] receive [your / her / his] education?
1. United States only  2. Outside United States only  3. Both in the United States and outside the United States  5. Had no education  NA

GO TO KL44  GO TO KL59CKPT  GO TO KL59CKPT  GO TO KL44

SIGNAL for NA: This information is important. Please select a response.
Now I would like to talk about the education [you / she has / he has] received. Did [you / she / he] graduate from high school, get a GED, or neither?

- ENTER [3] if R says still in school (attending grade 1-12) or working on a GED

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

GO TO KL45MO  GO TO KL46  GO TO KL49  GO TO KL51

(WEB) Did [you / she / he] graduate from high school, get a GED, or neither?

<table>
<thead>
<tr>
<th>1. Yes, graduated from high school</th>
<th>2. Yes, received a GED</th>
<th>3. No, neither</th>
<th>NA</th>
</tr>
</thead>
</table>

GO TO KL45MO  GO TO KL46  GO TO KL49  GO TO KL51

KL45MO, KL45YR. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

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?

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

The month entered is: [KL45MO]

- ENTER the year below

1920 – [CYEAR] → GO TO KL51

(WEB) In what month and year did [you / she / he] graduate?

If you do not know the month, please select the season.


1920 – [CYEAR] Year → GO TO KL51

CHECK: Please enter a date before today.

KL46. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

What was the highest grade [you / she / he] completed prior to getting [your / her / his] GED?

- Record last grade finished prior to receiving GED

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

GO TO KL47MO

(WEB) What was the highest grade [you / she / he] completed prior to getting [your / her / his] GED?

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

GO TO KL47MO
KL47MO, KL47YR. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] (Respondent)

In what month and year did [you / she / he] complete [KL46]?

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

Select ▼


In what month and year did [you / she / he] complete [KL46]?
The month entered is: [KL47MO]

- ENTER the year below

1920 – [CYEAR] (WEB) In what month and year did [you / she / he] complete [KL46]?
If you do not know the month, please select the season.

Select ▼


In what month and year did [you / she / he] complete [KL46]?
The month entered is: [KL47MO]

- ENTER the year below

1920 – [CYEAR] (WEB) In what month and year did [you / she / he] complete [KL46]?
If you do not know the month, please select the season.

Select ▼


In what month and year did [you / she / he] complete [KL46]?
The month entered is: [KL48MO]

- ENTER the year below

1920 – [CYEAR] (WEB) In what month and year did [you / she / he] complete [KL46]?
If you do not know the month, please select the season.

Select ▼


In what month and year did [you / she / he] complete [KL46]?
The month entered is: [KL48MO]

- ENTER the year below

1920 – [CYEAR]
What was the highest grade you completed in school?

- Record last grade finished

<table>
<thead>
<tr>
<th>Grade</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>None</td>
</tr>
<tr>
<td>1</td>
<td>First grade</td>
</tr>
<tr>
<td>2</td>
<td>Second grade</td>
</tr>
<tr>
<td>3</td>
<td>Third grade</td>
</tr>
<tr>
<td>4</td>
<td>Fourth grade</td>
</tr>
<tr>
<td>5</td>
<td>Fifth grade</td>
</tr>
<tr>
<td>6</td>
<td>Sixth grade</td>
</tr>
<tr>
<td>7</td>
<td>Seventh grade</td>
</tr>
<tr>
<td>8</td>
<td>Eighth grade</td>
</tr>
<tr>
<td>9</td>
<td>Ninth grade</td>
</tr>
<tr>
<td>10</td>
<td>Tenth grade</td>
</tr>
<tr>
<td>11</td>
<td>Eleventh grade</td>
</tr>
</tbody>
</table>

GO TO KL51

In what month and year did you complete [KL49]?

- 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>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>January</td>
</tr>
<tr>
<td>2</td>
<td>February</td>
</tr>
<tr>
<td>3</td>
<td>March</td>
</tr>
<tr>
<td>4</td>
<td>April</td>
</tr>
<tr>
<td>5</td>
<td>May</td>
</tr>
<tr>
<td>6</td>
<td>June</td>
</tr>
<tr>
<td>7</td>
<td>July</td>
</tr>
<tr>
<td>8</td>
<td>August</td>
</tr>
<tr>
<td>9</td>
<td>September</td>
</tr>
<tr>
<td>10</td>
<td>October</td>
</tr>
<tr>
<td>11</td>
<td>November</td>
</tr>
<tr>
<td>12</td>
<td>December</td>
</tr>
<tr>
<td>21</td>
<td>Winter (Dec-Feb)</td>
</tr>
<tr>
<td>22</td>
<td>Spring (Mar-May)</td>
</tr>
<tr>
<td>23</td>
<td>Summer (Jun-Aug)</td>
</tr>
<tr>
<td>24</td>
<td>Fall (Sep-Nov)</td>
</tr>
</tbody>
</table>

The month entered is: [KL50MO]

- ENTER the year below

1920 – [CYEAR]

In what month and year did you complete [KL49]?

If you do not know the month, please select the season.

<table>
<thead>
<tr>
<th>Month or Season</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 January</td>
<td>January</td>
</tr>
<tr>
<td>2 February</td>
<td>February</td>
</tr>
<tr>
<td>3 March</td>
<td>March</td>
</tr>
<tr>
<td>4 April</td>
<td>April</td>
</tr>
<tr>
<td>5 May</td>
<td>May</td>
</tr>
<tr>
<td>6 June</td>
<td>June</td>
</tr>
<tr>
<td>7 July</td>
<td>July</td>
</tr>
<tr>
<td>8 August</td>
<td>August</td>
</tr>
<tr>
<td>9 September</td>
<td>September</td>
</tr>
<tr>
<td>10 October</td>
<td>October</td>
</tr>
<tr>
<td>11 November</td>
<td>November</td>
</tr>
<tr>
<td>12 December</td>
<td>December</td>
</tr>
<tr>
<td>21 Winter</td>
<td>Winter (Dec-Feb)</td>
</tr>
<tr>
<td>22 Spring</td>
<td>Spring (Mar-May)</td>
</tr>
<tr>
<td>23 Summer</td>
<td>Summer (Jun-Aug)</td>
</tr>
<tr>
<td>24 Fall</td>
<td>Fall (Sep-Nov)</td>
</tr>
</tbody>
</table>

1920 – [CYEAR] Year

CHECK: Please enter a date before today.

Did you attend college?

1. Yes 5. No → GO TO KL59CKPT

Did you attend college?

1. Yes 5. No → GO TO KL59CKPT

SIGNAL for NA: This information is important. Please select a response.
KL52MO, KL52YR. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE]
[Respondent]
In what month and year did [you / she / he] last attend college?
• If R says "still in school", ENTER Don’t Know here and ENTER Still in School on the Year screen
• SELECT Month and [Enter] to go to next screen for year
• IF NECESSARY: What would be your best estimate?
  Select ▼
  1. January
  2. February
  3. March
  4. April
  5. May
  6. June
  7. July
  8. August
  9. September
  10. October
  11. November
  12. December
  21. Winter (Dec-Feb)
  22. Spring (Mar-May)
  23. Summer (Jun-Aug)
  24. Fall (Sep-Nov)
(In what month and year did [you / she / he] last attend college?)
The month entered is: [KL52MO]
• ENTER the year below
  1920 – [CYEAR] 0 9996. Still in school (SP_0B)
(WEB) In what month and year did [you / she / he] last attend college? If you do not know the month, please select the season.
  Select ▼
  Month or Season
  1. January
  2. February
  3. March
  4. April
  5. May
  6. June
  7. July
  8. August
  9. September
  10. October
  11. November
  12. December
  21. Winter (Dec-Feb)
  22. Spring (Mar-May)
  23. Summer (Jun-Aug)
  24. Fall (Sep-Nov)
  1920 – [CYEAR] Year
  0 9996. Still in school (SP_0B)
CHECK: Please enter a date before today.

KL53. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [Respondent]
What is the highest year of college [you have / she has / he has] completed?
• IF R gives a degree: How many years of college [have you / has she / has he] completed?
  We’ll talk about any college degrees [you have / she has / he has] earned next.
  0. Less than one year
  1. One year
  2. Two years
  3. Three years
  GO TO KL59CKPT
  4. Four years
  5. Five years or more
  DK/RF
  GO TO KL54
(WEB) What is the highest year of college [you have / she has / he has] completed?
  0. Less than one year
  1. One year
  2. Two years
  3. Three years
  GO TO KL59CKPT
  4. Four years
  5. Five years or more
  NA
  GO TO KL54

KL54. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [Respondent]
Did [you / she / he] receive a college degree?
  1. Yes
  5. No
  → GO TO KL59CKPT
GO TO KLS5
(WEB) Did [you / she / he] receive a college degree?
  1. Yes
  5. No
  → GO TO KL59CKPT
GO TO KLS5
What is the highest college degree [you have / she has / he has] received?  

- PROBE for the highest degree received

<table>
<thead>
<tr>
<th>Degree</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Associate’s degree (AA)</td>
<td></td>
</tr>
<tr>
<td>2. Bachelor’s degree (BA, BS)</td>
<td></td>
</tr>
<tr>
<td>DK/RF</td>
<td></td>
</tr>
<tr>
<td>3. Master’s degree (MA, MS, MBA)</td>
<td></td>
</tr>
<tr>
<td>4. Doctorate (PhD)</td>
<td></td>
</tr>
<tr>
<td>5. Law Degree (LLB, JD)</td>
<td></td>
</tr>
<tr>
<td>6. Medical degree (MD, DDS, DVM, DO)</td>
<td></td>
</tr>
<tr>
<td>8. Honorary degree</td>
<td></td>
</tr>
<tr>
<td>97. Other - specify: (KL55SPEC. Specify (String 100))</td>
<td></td>
</tr>
</tbody>
</table>

GO TO KL55E

What was [your / her / his] major or majors at the college or university from which [you / she / he] received [your / her / his] bachelor’s degree?  

- Probe for details and dual majors

String 100

GO TO KL55E

What was the name of the college or university from which [you / she / he] received [your / her / his] BACHELOR’S degree?  

String 100

GO TO KL55A

What was the name of the college or university from which [you / she / he] received [your / her / his] bachelor’s degree?  

String 100

GO TO KL55A
KL55CCOUNTRY (KL55CCTRYNAME), KL55CCITY, KL55CSTATE (KL55CSTABBR).

(CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age
[AGEIWDATE] [(Respondent)]

Where was it located? (In what country was that?)
- **If needed:** In what country was the college or university from which [you / she / he] received [your / her / his] bachelor’s degree?
- **ENTER [185 UNITED STATES] for Puerto Rico, U.S. Virgin Islands, Guam, American Samoa or the Northern Mariana Islands**

```
Select ▼ 1 – 193 (Defaults to 185/US)
```

(In what city was that?)
- **If needed:** In what city was the college or university from which [you / she / he] received [your / her / his] bachelor’s degree?

```
String 100
For COUNTRY=185
```

(In what state was that?)
- **If needed:** In what state was the college or university from which [you / she / he] received [your / her / his] bachelor’s degree?

```
Select ▼ 1 – 57 (Assigned 57/FC if Country<>185)
```

(WEB) Where was the college or university from which [you / she / he] received [your / her / his] BACHELOR’S degree?

Country

```
Select ▼ 1 – 193 (Defaults to 185/US)
```

United States includes Puerto Rico,
U.S. Virgin Islands, Guam,
American Samoa and the Northern Mariana Islands

City

```
String 25
```

State

```
Select ▼ 1 – 57 (Assigned 57/FC if Country<>185)
```
KL55DMO, KL55DYR. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

In what month and year did [you / she / he] receive [your / her / his] bachelor’s degree?

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

Select ▼


(In what month and year did [you / she / he] receive [your / her / his] bachelor’s degree?)
The month entered is: [KL55DMO]

- ENTER the year below

1920 – [CYEAR]

(WEB) In what month and year did [you / she / he] receive [your / her / his] BACHELOR’S degree?

If you do not know the month, please select the season.

Select ▼

Month or Season
4. April 10. October 24. Fall (Sep-Nov)
5. May 11. November
6. June 12. December

1920 – [CYEAR] Year

CHECK: Please enter a date before today.

KL55E. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

(And) What was [your / her / his] [KL55=BACHELORS: major or majors / ALL OTHERS: area of study] at the college or university from which [you / she / he] received [your / her / his] highest degree?

- Probe for details and dual majors

String 100

(WEB) What was [your / her / his] [KL55=BACHELORS: major or majors / ALL OTHERS: area of study] at the college or university from which [you / she / he] received [your / her / his] HIGHEST degree?

String 100

KL56. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

What was the name of the college or university?

- If needed: What was the name of the college or university from which [you / she / he] received [your / her / his] highest degree?

String 100

(WEB) What was the name of the college or university from which [you / she / he] received [your / her / his] HIGHEST degree?

String 100
KL57COUNTRY (KL57CTRYNAME), KL57CITY, KL57STATE (KL57STABBR).
(CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
Where was it located? (In what country was that?)
- If needed: In what country was the college or university from which [you / she / he] received [your / her / his] highest degree?
- ENTER [185 UNITED STATES] for Puerto Rico, U.S. Virgin Islands, Guam, American Samoa or the Northern Mariana Islands
Select 1 – 193 (Defaults to 185/US)
(In what city was that?)
- If needed: In what city was the college or university from which [you / she / he] received [your / her / his] highest degree?
String 100
(In what state was that?) (For COUNTRY=185)
- If needed: In what state was the college or university from which [you / she / he] received [your / her / his] highest degree?
Select 1 – 57 (Assigned 57/FC if Country<>185)
(WEB) Where was the college or university from which [you / she / he] received [your / her / his] HIGHEST degree?
Country
United States includes Puerto Rico, U.S. Virgin Islands, Guam, American Samoa and the Northern Mariana Islands
Select 1 – 193 (Defaults to 185/US)
City
String 25
State
Select 1 – 57 (Assigned 57/FC if Country<>185)
KL58MO, KL58YR. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
In what month and year 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?
(The month entered is: KL58MO)
- ENTER the year below
1920 – [CYEAR]
(WEB) In what month and year did [you / she / he] receive [your / her / his] HIGHEST degree? if you do not know the month, please select the season.
1920 – [CYEAR]
Year
CHECK: Please enter a date before today.
KL59CKPT. CAI Checkpoint: Where SP/RP Educated

1. Outside U.S. (KL43=2, 3)  3. U.S. Only (KL43=1, DK)  5. All Others (KL43=5, RF, NA) → GO TO KL68A

GO TO KL61ACKPT

KL60. (CATJ) [CYAQRTH], [CYNAMF] [CYNAML]
How many years of school did [you / she / he] complete outside of the U.S.?

1 – 25

(WEB) How many years of school did [you / she / he] complete outside of the United States?

1 – 25 Number of years

CHECK: Please enter a number from 1 to 25.

KL61. (CATJ) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
What was the highest degree or certificate [you / she / he] earned outside the U.S.?

String 100

(WEB) What was the highest degree or certificate [you / she / he] earned outside the United States?

String 100

KL61ACKPT. CAI Checkpoint: Whether SP/RP Still in School

1. Still in School (KL52MO=96 or KL52YR=9996) → GO TO KL61B  5. All Others

GO TO KL61B

KL61A. (CATJ) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
[Are you / Is she / Is he] currently 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 KL68A

GO TO KL61B

(WEB) [Are you / Is she / Is he] currently 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 KL68A

GO TO KL61B
KL61B. *(CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

[KL61ACKPT=STILL IN SCHOOL: Earlier you said [you are / [SPOUSE-PARTNER] is / [REFERENCE PERSON] is still in school.]

What grade or year [are you / is she / is he] currently attending?

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. 12th grade or working toward GED  
13. 1st year of college (freshman)  
14. 2nd year of college (sophomore)  
15. 3rd year of college (junior)  
16. 4th year of college (senior)  
17. 5th year of college or higher  
18. Post-graduate work

*WEB* [KL61ACKPT=STILL IN SCHOOL: Earlier you reported that [you are / [SPOUSE-PARTNER] is / [REFERENCE PERSON] is still in school.]

What grade or year [are you / is she / is he] currently attending?

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. 12th grade or working toward GED  
13. 1st year of college (freshman)  
14. 2nd year of college (sophomore)  
15. 3rd year of college (junior)  
16. 4th year of college (senior)  
17. 5th year of college or higher  
18. Post-graduate work

**Religious Preference**

KL68A. *(CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]

We'd like to ask you some questions about religious or spiritual beliefs. What is [your / [SPOUSE-PARTNER]'s / [REFERENCE PERSON]'s] religious preference?

- **IF** R says Christian, PROBE for specific denomination; if R cannot provide specific denomination ENTER [14]
- **IF** R says Protestant, PROBE for specific denomination; if R cannot provide specific denomination, ENTER [13]

1. None/No preference  
2. Atheist (do not believe in God)  
3. Agnostic (not sure if there is a God)  
4. Roman Catholic  
5. Greek/Russian/Eastern Orthodox  
6. Baptist  
7. Episcopalian  
8. Jehovah’s Witness  
9. Lutheran  
10. Methodist/African Methodist  
11. Pentecostal/Assembly of God  
12. Presbyterian  
13. Protestant, Unspecified  
14. Christian, Unspecified  
15. Christian, Non-denominational  
16. Jewish (Judaism)  
17. Muslim (Islam)  
18. Buddhist  
19. Hindu

97. Other-Specify (KL68APEC, Specify (String 100))

*WEB* What is [your / [SPOUSE-PARTNER]'s / [REFERENCE PERSON]'s] religious preference?

1. None; No preference  
2. Atheist (do not believe in God)  
3. Agnostic (not sure if there is a God)  
4. Roman Catholic  
5. Greek/Russian/Eastern Orthodox  
6. Baptist  
7. Episcopalian  
8. Jehovah’s Witness  
9. Lutheran  
10. Methodist/African Methodist  
11. Pentecostal/Assembly of God  
12. Presbyterian  
13. Protestant, Unspecified  
14. Christian, Unspecified  
15. Christian, Non-denominational  
16. Jewish (Judaism)  
17. Muslim (Islam)  
18. Buddhist  
19. Hindu

97. Other - Please specify: (KL68APEC)
Years Working

KL70 RULE: Whether SP/RP is 18 Years Old or Older

18+ Years Old → GO TO KL73 END RULE

↓

KL70. (CATJ) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

How many years altogether [have you / has she / has he] worked for money since [you were / she was / he was] 18?

• [AGEIWDATE>18: For 1 year or less, ENTER [1]]

AGE 18:

0 95. Less than one year (SP_0C)

0 94. None (SP_0D)

DK/RF

GO TO KL71

AGE>18:

0 96. All years since age 18 (SP_0B)

0 94. None (SP_0D)

DK/RF

GO TO KL73 END RULE

WEB) How many years altogether [have you / has she / has he] worked for money since [you were / she was / he was] 18 years old?

[AGEIWDATE >18: For one year or less, please enter “1”.]

AGE 18:

0 95. Less than one year

(SP_0C)

NA

GO TO KL71

AGE>18:

0 96. All years since age 18 (SP_0B)

0 94. None (SP_0D)

NA

GO TO KL71

CHECK: Please enter a number from 1 to [AGE minus 18].

KL71. (CATJ) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

How many of these years did [you / she / he] work full-time for most or all of the year?

• [AGEIWDATE >18: For 1 year or less, ENTER [1]]

AGE 18:

0 95. Less than one year

(SP_0C)

DK/RF

GO TO KL72

AGE>18:

1 – 90 ([KL70]/AGEIWDATE minus 18)

0 96. All years since age 18 (SP_0B)

(Displayed if KL70=96)

0 94. None (SP_0D)

DK/RF

GO TO KL73 END RULE

WEB) How many of these years did [you / she / he] work full-time for most or all of the year?

[AGEIWDATE >18: For one year or less, please enter “1”.]

AGE 18:

0 95. Less than one year

(SP_0C)

NA

GO TO KL72

AGE>18:

1 – 90 ([KL70]/AGEIWDATE minus 18)

0 96. All years since age 18 (SP_0B)

(Displayed if KL70=96)

0 94. None (SP_0D)

NA

GO TO KL72

CHECK: Please enter a number from 1 to [[KL70] / [AGE minus 18]].
KL72. ([CATI] [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)])

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?

- **DO NOT PROBE**

Open End

(WEB) 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. ([CATI] [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)])

What kind of business or industry was that in?

- **DO NOT PROBE**

Open End

(WEB) What kind of business or industry was that in?

Open End

KL73 END RULE: Whether This is Spouse-Partner or Reference Person Loop

[Spouse-Partner (KL1ACKPT[1].CODE=1)] → REPEAT SECTION KL for Reference Person; Then GO TO IMMIGRANT SECTION

[Reference Person (KL1ACKPT[2].CODE=2)] → GO TO IMMIGRANT SECTION

**Education Update**

KL74. ([CATI] [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)])

Now I would like to talk about the education [you have / [SPOUSE-PARTNER] has / [REFERENCE PERSON] has] received.

[Have you / Has [SPOUSE-PARTNER] / Has [REFERENCE PERSON]] attended regular school since our last interview on [PYIWDATE]? Regular school includes high school and schooling that leads to a college or professional school degree.

- **ENTER [2] for “still in school”**
- **If R says only “yes”, PROBE: [Are you / Is [SPOUSE-PARTNER]/ Is [REFERENCE PERSON]] currently attending school?**

2. Yes, and still attending regular school

5. No, neither DK/RF

1. Yes, but not currently attending regular school

GO TO KL84CKPT

(WEB) The next questions are about the education [you have / [SPOUSE-PARTNER] has / [REFERENCE PERSON] has] received. [Have you / Has [SPOUSE-PARTNER] / Has [REFERENCE PERSON]] attended regular school since your last interview on [PYIWDAT]? Regular school includes high school and schooling that leads to a college or professional school degree.

2. Yes, and still attending regular school

5. No, neither NA

1. Yes, but not currently attending regular school

GO TO KL84CKPT

**SIGNAL for NA:** This information is important. Please select a response.
KL74C. *(CATI)* *(CYNAMF)* *(CYNAML)*: *(CYAQRTH)*, *(CYFUHU)*, Age: *(AGEIWDATE)* [[(Respondent)]

Since our last interview on *(PYIWDATE)*, where did *(you / SPOUSE-PARTNER / REFERENCE PERSON)* 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 outside  

DK RF → GO TO KL83ACKPT

GO TO KL76CKPT  GO TO KL83ACKPT  GO TO KL76CKPT

*(WEB)* Since *(PYIWDATE)*, where did *(you / SPOUSE-PARTNER / REFERENCE PERSON)* receive *(your / her / his)* education?

1. United States only  
2. Outside United States only  
3. Both in the United States and outside the United States

NA → GO TO KL83ACKPT  

GO TO KL76CKPT

SIGNAL for NA: This information is important. Please select a response.


KL76CKPT. CAI Checkpoint: Whether Preloaded Education Level is Less Than HS Grad/GED

1. <HS Grad/GED (PYPERSINFO.COMPEDUC=0-11, DK, RF, NA)  
5. All Others

→ GO TO KL78B

KL76. *(CATI)* *(CYNAMF)* *(CYNAML)*: *(CYAQRTH)*, *(CYFUHU)*, Age *(AGEIWDATE)* [[(Respondent)]

*(COMPEDUC=0-11)*: *(Since our last interview on [PYIWDATE]), did / COMPEDUC=NA: Did [you / she / he] graduate from high school, get a GED, or neither?

• ENTER [3] if R says still in school (attending grade 1-12) or working on a GED

1. Graduated from high school  
2. Got a GED  
3. Neither  

DK/RF → GO TO KL78B

GO TO KL77MO  GO TO KL77A  GO TO KL78A

*(WEB)* *(COMPEDUC=0-11)*: *(Since [PYIWDATE]), did / COMPEDUC=NA: Did [you / she / he] graduate from high school, get a GED, or neither?

Please select “Neither” if *(you are / she is / he is)* still attending grade 1–12 or working toward a GED.

1. Yes, graduated from high school  
2. Yes, received a GED  
3. No, neither  

NA → GO TO KL78B

GO TO KL77MO  GO TO KL77A  GO TO KL78A
In what month and year did [you / she / he] graduate?

- [COMPEDUC=0-11: If needed: Between our last interview on [PYIWDATE] and now]
- SELECT Month and [Enter] to go to next screen for year
- If necessary: What would be your best estimate?

In what month and year did [you / she / he] graduate?

- [COMPEDUC=0-11: If needed: Between our last interview on [PYIWDATE] and now]
- The month entered is: [KL77MO]
- ENTER the year below

1920 – [CYEAR]

CHECK for KL77YR<P2YEAR & COMPEDUC=0-11: IWER: All years prior to [P2YEAR] are not allowed since we are asking about education since [PYIWDATE]. Please VERIFY Year graduated High School since [PYIWDATE]: If R confirms the year is before [P2YEAR], then select GOTO and ENTER [5] at KL74. If R gives a year from [P2YEAR] to [CYEAR], then CLOSE and ENTER [Year] at this question.

GO TO KL78B

(WEB) In what month and year did [you / she / he] graduate [COMPEDUC=0-11: between [PYIWDATE] and now]?

If you do not know the month, please select the season.

Select ▼

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

1920 – [CYEAR] Year

GO TO KL78B

CHECK: Please enter a date before today.

CHECK for COMPEDUC=0-11: Please enter a year from [P2YEAR] to [CYEAR].
What was the highest grade [you / he / she] completed in school prior to getting [your / her / his] GED?

- Record last grade finished prior to receiving GED

<table>
<thead>
<tr>
<th>Grade</th>
<th>Option</th>
</tr>
</thead>
<tbody>
<tr>
<td>0. None</td>
<td>DK/RF</td>
</tr>
<tr>
<td>1. First grade</td>
<td>None</td>
</tr>
<tr>
<td>2. Second grade</td>
<td>None</td>
</tr>
<tr>
<td>3. Third grade</td>
<td>None</td>
</tr>
<tr>
<td>4. Fourth grade</td>
<td>None</td>
</tr>
<tr>
<td>5. Fifth grade</td>
<td>None</td>
</tr>
<tr>
<td>6. Sixth grade</td>
<td>None</td>
</tr>
<tr>
<td>7. Seventh grade</td>
<td>None</td>
</tr>
<tr>
<td>8. Eighth grade</td>
<td>None</td>
</tr>
<tr>
<td>9. Ninth grade</td>
<td>None</td>
</tr>
<tr>
<td>10. Tenth grade</td>
<td>None</td>
</tr>
<tr>
<td>11. Eleventh grade</td>
<td>None</td>
</tr>
</tbody>
</table>

In what month and year did [you / she / he] complete [KL77A]?

- 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>Option</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. January</td>
<td>None</td>
</tr>
<tr>
<td>2. February</td>
<td>None</td>
</tr>
<tr>
<td>3. March</td>
<td>None</td>
</tr>
<tr>
<td>4. April</td>
<td>None</td>
</tr>
<tr>
<td>5. May</td>
<td>None</td>
</tr>
<tr>
<td>6. June</td>
<td>None</td>
</tr>
<tr>
<td>7. July</td>
<td>None</td>
</tr>
<tr>
<td>8. August</td>
<td>None</td>
</tr>
<tr>
<td>9. September</td>
<td>None</td>
</tr>
<tr>
<td>10. October</td>
<td>None</td>
</tr>
<tr>
<td>11. November</td>
<td>None</td>
</tr>
<tr>
<td>12. December</td>
<td>None</td>
</tr>
<tr>
<td>21. Winter</td>
<td>None</td>
</tr>
<tr>
<td>22. Spring</td>
<td>None</td>
</tr>
<tr>
<td>23. Summer</td>
<td>None</td>
</tr>
<tr>
<td>24. Fall</td>
<td>None</td>
</tr>
</tbody>
</table>

The month entered is: [KL77AMO]

- ENTER the year below

1920 – [CYEAR]

CHECK: Please enter a date before today.
KL78MO, KL78YR. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

In what month and year did [you / she / he] receive [your / her / his] GED?
- [COMPEDUC=0-11: If needed: Between our last interview on [PYIWDATE] and now]
- SELECT Month and [Enter] to go to next screen for year
- If necessary: What would be your best estimate?

Select
1. January
2. February
3. March
4. April
5. May
6. June
7. July
8. August
9. September
10. October
11. November
12. December
21. Winter (Dec-Feb)
22. Spring (Mar-May)
23. Summer (Jun-Aug)
24. Fall (Sep-Nov)

(In what month and year did [you / she / he] receive [your / her / his] GED?)
- [COMPEDUC=0-11: If needed: Between our last interview on [PYIWDATE] and now]
- The month entered is: [KL78MO]
- ENTER the year below

1920 – [CYEAR]

CHECK for KL78YR<P2YEAR & COMPEDUC=0-11: IWER: All years prior to [P2YEAR] are not allowed since we are asking about education since [PYIWDATE]. Please VERIFY Year received GED since [PYIWDATE]: If R confirms the year is before [P2YEAR], then select GOTO and ENTER [5] at KL74. If R gives a year from [P2YEAR] to [CYEAR], then CLOSE and ENTER [Year] at this question.

GO TO KL78B

(WEB) In what month and year did [you / she / he] receive [your / her / his] GED [COMPEDUC=0-11: between [PYIWDATE] and now]?

If you do not know the month, please select the season.

Select
Month or Season
1. January
2. February
3. March
4. April
5. May
6. June
7. July
8. August
9. September
10. October
11. November
12. December
21. Winter (Dec-Feb)
22. Spring (Mar-May)
23. Summer (Jun-Aug)
24. Fall (Sep-Nov)

1920 – [CYEAR] Year

GO TO KL78B

CHECK: Please enter a date before today.

CHECK for COMPEDUC=0-11: Please enter a year from [P2YEAR] to [CYEAR].
What was the highest grade [you / he / she] completed in school?

- Record last grade finished

<table>
<thead>
<tr>
<th>Grade</th>
<th>Description</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>None</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>First grade</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Second grade</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Third grade</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Fourth grade</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Fifth grade</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Sixth grade</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Seventh grade</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Eighth grade</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Ninth grade</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Tenth grade</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Eleventh grade</td>
<td></td>
</tr>
</tbody>
</table>

GO TO KL78MO

What was the highest grade [you / he / she] completed in school?

<table>
<thead>
<tr>
<th>Grade</th>
<th>Description</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>None</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>First grade</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Second grade</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Third grade</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Fourth grade</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Fifth grade</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Sixth grade</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Seventh grade</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Eighth grade</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Ninth grade</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Tenth grade</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Eleventh grade</td>
<td></td>
</tr>
</tbody>
</table>

GO TO KL78AMO

In what month and what year did [you / she / he] complete [KL78A]?

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


In what month and what year did [you / she / he] complete [KL78A]?

The month entered is: [KL78AMO]

- ENTER the year below

1920 – [CYEAR]

WEB In what month and year did [you / she / he] complete [KL78A]?

If you do not know the month, please select the season.

        4. April 10. October 24. Fall (Sep-Nov)
        5. May 11. November
        6. June 12. December

1920 – [CYEAR] Year

CHECK: Please enter a date before today.
KL78B. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]
Did [you / she / he] attend college between [PYIWDATE] and now?

<p>| | | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Yes</td>
<td>5. No</td>
<td>→ GO TO KL78DCKPT</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

GO TO KL78BMO

CHECK for KL78B<=Yes & COMPEDUC=12-17: IWER: R reported that [SPOUSE-PARTNER/REFERENCE PERSON] attended school since [PYIWDATE], but we know (she / he) already graduated high school or received a GED BEFORE [P2YEAR]. Please VERIFY with R whether this person attended college since [PYIWDATE] or is currently attending college: If R says NO or DK/RF, then select GOTO and ENTER [S] or [DK, RF] at KL74. If R says YES, then CLOSE here and ENTER [1] at this question.

WEB) Did [you / she / he] attend college between [PYIWDATE] and now?

<p>| | | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Yes</td>
<td>5. No</td>
<td>→ GO TO KL78DCKPT</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

GO TO KL78BMO

SIGNAL for NA: This information is important. Please select a response.

KL78BMO, KL78BMR. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

In what month and year did [you / she / he] last attend college?

- If needed: Between our last interview on [PYIWDATE] and now
- If R says "still in school", ENTER Don’t Know here and ENTER Still in School on the Year screen
- SELECT Month and [Enter] to go to next screen for year
- NECESSARY: What would be your best estimate?

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

(In what month and year did [you / she / he] last attend college?)

- If needed: Between our last interview on [PYIWDATE] and now

The month entered is: [KL78BMO]

- ENTER the year below

| Select ✓ | [P2YEAR] – [CYEAR]; 9996. Still in school |

WEB) In what month and year did [you / she / he] last attend college between [PYIWDATE] and now?

If you do not know the month, please select the season.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>4. April</td>
<td>10. October</td>
<td>24. Fall (Sep-Nov)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>5. May</td>
<td>11. November</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>6. June</td>
<td>12. December</td>
<td></td>
</tr>
</tbody>
</table>

| Select ✓ | Year | [P2YEAR] – [CYEAR]; 9996. Still in school |

CHECK: Please enter a date before today.
<table>
<thead>
<tr>
<th>1. Attended College (KL78B=Yes)</th>
<th>Did Not Attend College (KL78B&lt;&gt;Yes)</th>
</tr>
</thead>
<tbody>
<tr>
<td>3. Preloaded Education&lt;&gt;Response (PYPERSINFO.COMPEDUC=DK, RF, NA)</td>
<td>5. Preloaded Education=Response (PYPERSINFO.COMPEDUC=0-17)</td>
</tr>
</tbody>
</table>

**KL78DCKPT. CAI Checkpoint: Whether SP/RP Attended College since Last Wave**

**KL78D. (CATI)**

[CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

Altogether, what is the highest year of college [you have / she has / he has] completed?

- **IF R gives a degree**: How many years of college [have you / has she / has he] completed altogether? We'll talk about any college degrees [you have / she has / he has] earned next.

  - [KL78DCKPT=3]: ENTER [0] if R says None or Never attended college

<table>
<thead>
<tr>
<th>0. Less than one year</th>
<th>1. One year</th>
<th>2. Two years</th>
<th>3. Three years</th>
<th>4. Four years</th>
<th>5. Five years or more</th>
<th>DK/RF</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO KL83ACKPT</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>GO TO KL83ACKPT</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>GO TO KL83ECKPT</td>
<td></td>
</tr>
<tr>
<td>WEB) ALTOGETHER, what is the highest year of college [you have / she has / he has] completed? Please select “Less than one year” if [you / she / he] never attended college.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>0. Less than one year</th>
<th>1. One year</th>
<th>2. Two years</th>
<th>3. Three years</th>
<th>4. Four years</th>
<th>5. Five years or more</th>
<th>NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO KL83ACKPT</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>GO TO KL83ECKPT</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>GO TO KL83ECKPT</td>
<td></td>
</tr>
</tbody>
</table>

**KL78ECKPT. CAI Checkpoint: Whether SP/RP Attended College since Last Wave**

**KL78E. (CATI)**

[CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

Did [you / she / he] receive a college degree between [PYIWDATE] and now?

<table>
<thead>
<tr>
<th>1. Yes</th>
<th>5. No</th>
<th>→ GO TO KL83ACKPT</th>
</tr>
</thead>
</table>

**WEB) Did [you / she / he] receive a college degree between [PYIWDATE] and now?**

<table>
<thead>
<tr>
<th>1. Yes</th>
<th>5. No</th>
<th>→ GO TO KL83ACKPT</th>
</tr>
</thead>
</table>

GO TO KL78F1
Since our last interview on [PYIWDATE], what college degree did [you / she / he] receive?

- If more than one degree, PROBE for the highest degree received since [PYIWDATE]

1. Associate’s degree (AA)
2. Bachelor’s degree (BA/BS)
3. Master’s degree (MA, MS, MBA)
4. Doctorate (PhD)
5. Law Degree (LLB, JD)
6. Medical degree (MD, DDS, DVM, DO)
7. Honorary degree
8. Other

97. Other-specify (KL78F1PEC. Specify (String 100))

Between [PYIWDATE] and now, what college degree did [you / she / he] receive?

1. Associate’s degree (AA)
2. Bachelor’s degree (BA/BS)
3. Master’s degree (MA, MS, MBA)
4. Doctorate (PhD)
5. Law Degree (LLB, JD)
6. Medical degree (MD, DDS, DVM, DO)
7. Honorary degree
8. Other

97. Other - Please specify: (KL78F1SPEC)

What was [your / her / his] major or majors at the college or university from which [you / she / he] received [your / her / his] bachelor’s degree?

- Probe for details and dual majors

What was [your / her / his] major or majors at the college or university from which [you / she / he] received [your / her / his] BACHELOR’S degree?

What was the name of the college or university from which [you / she / he] received [your / her / his] bachelor’s degree?

What was the name of the college or university from which [you / she / he] received [your / her / his] BACHELOR’S degree?
Where was it located? (In what country was that?)

- If needed: In what country was the college or university from which [you / she / he] received [your / her / his] bachelor’s degree?
- ENTER [185 UNITED STATES] for Puerto Rico, U.S. Virgin Islands, Guam, American Samoa or the Northern Mariana Islands

Select \(\text{1 - 193} (\text{Defaults to 185/US})\)

(In what city was that?)

- If needed: In what city was the college or university from which [you / she / he] received [your / her / his] bachelor’s degree?

String 100

(In what state was that?) (For \text{COUNTRY=}185)

- If needed: In what state was the college or university from which [you / she / he] received [your / her / his] bachelor’s degree?

Select \(\text{1 - 57} (\text{Assigned 57/FC if Country<>185})\)

Where was the college or university from which [you / she / he] received [your / her / his] BACHELOR’S degree?

United States includes Puerto Rico, U.S. Virgin Islands, Guam, American Samoa and the Northern Mariana Islands

Country Select \(\text{1 - 193} (\text{Defaults to 185/US})\)

City String 100

State Select \(\text{1 - 57} (\text{Assigned 57/FC if Country<>185})\)
In what month and year did [you / she / he] receive [your / her / his] bachelor’s degree?

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

<table>
<thead>
<tr>
<th>Select</th>
<th>Month</th>
<th>Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>January</td>
<td>1920</td>
</tr>
<tr>
<td>2</td>
<td>February</td>
<td>1920</td>
</tr>
<tr>
<td>3</td>
<td>March</td>
<td>1920</td>
</tr>
<tr>
<td>4</td>
<td>April</td>
<td>1920</td>
</tr>
<tr>
<td>5</td>
<td>May</td>
<td>1920</td>
</tr>
<tr>
<td>6</td>
<td>June</td>
<td>1920</td>
</tr>
<tr>
<td>7</td>
<td>July</td>
<td>1920</td>
</tr>
<tr>
<td>8</td>
<td>August</td>
<td>1920</td>
</tr>
<tr>
<td>9</td>
<td>September</td>
<td>1920</td>
</tr>
<tr>
<td>10</td>
<td>October</td>
<td>1920</td>
</tr>
<tr>
<td>11</td>
<td>November</td>
<td>1920</td>
</tr>
<tr>
<td>12</td>
<td>December</td>
<td>1920</td>
</tr>
<tr>
<td>21</td>
<td>Winter (Dec-Feb)</td>
<td>1920</td>
</tr>
<tr>
<td>22</td>
<td>Spring (Mar-May)</td>
<td>1920</td>
</tr>
<tr>
<td>23</td>
<td>Summer (Jun-Aug)</td>
<td>1920</td>
</tr>
<tr>
<td>24</td>
<td>Fall (Sep-Nov)</td>
<td>1920</td>
</tr>
</tbody>
</table>

**CHECK:** Please enter a date before today.

(And) What was [your / her / his] [KL78F1=BACHELORS: major or majors / ALL OTHERS: area of study] at the college or university from which [you / she / he] received [your / her / his] highest degree since our last interview on [PYIWDATE]?

- **Probe for details and dual majors**

(WEB) What was [your / her / his] [KL78F1=BACHELORS: major or majors / ALL OTHERS: area of study] at the college or university from which [you / she / he] received [your / her / his] HIGHEST degree since [PYIWDATE]?

What was the name of the college or university?

- **If needed:** What was the name of the college or university from which [you / she / he] received [your / her / his] highest degree (since our last interview on [PYIWDATE])?

(WEB) What was the name of the college or university from which [you / she / he] received [your / his / her] HIGHEST degree since [PYIWDATE]?
(CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[Respondent]]
Where was it located? (In what country was that?)
- If needed: In what country was the college or university from which [you / she / he] received [your / her / his] highest degree?
- ENTER [185 UNITED STATES] for Puerto Rico, U.S. Virgin Islands, Guam, American Samoa or the Northern Mariana Islands

Select ▼ 1 – 193 (Defaults to 185/US)
(In what city was that?)
- If needed: In what city was the college or university from which [you / she / he] received [your / her / his] highest degree?

String 25
(In what state was that?) (For COUNTRY=185)
- If needed: In what state was the college or university from which [you / she / he] received [your / her / his] highest degree (since our last interview on [PYIWDATE])?

Select ▼ 1 – 57 (Assigned 57/FC if Country<>185)
(WEB) Where was the college or university from which [you / she / he] received [your / her / his] HIGHEST degree since [PYIWDATE]?

Country
United States includes Puerto Rico, U.S. Virgin Islands, Guam, American Samoa and the Northern Mariana Islands

Select ▼ 1 – 193 (Defaults to 185/US)
City
State
Select ▼ 1 – 57 (Assigned 57/FC if Country<>185)
KL83MO, KL83YR. **(CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[(Respondent)]]**

In what month and year did [you / she / he] receive [your / her / his] **highest** degree?
- **If needed:** Between our last interview on [PYIWDATE] and now
- **SELECT Month and [Enter] to go to next screen for year**
- **If necessary:** What would be your best estimate?

**Select ▼**


(In what month and year did [you / she / he] receive [your / her / his] highest degree)?
- **If needed:** Between our last interview on [PYIWDATE] and now
- **The month entered is:** [KL83MO]
- **ENTER the year below**

**Select ▼** [P2YEAR] – [CYEAR]

**(WEB) In what month and year did [you / she / he] receive [your / her / his] HIGHEST degree since [PYIWDATE]?**

*If you do not know the month, please select the season.*

**Select ▼** Month or Season

4. April 10. October 24. Fall (Sep-Nov)
5. May 11. November
6. June 12. December

**Select ▼** Year [P2YEAR] – [CYEAR]

*CHECK: Please enter a date before today.*

End KL76_KL83

KL83ACKPT. CAI Checkpoint: Where SP/RP Educated

<table>
<thead>
<tr>
<th>1. Outside U.S. (KL74C=2, 3)</th>
<th>3. U.S. Only (KL74C=1, DK,NA)</th>
<th>5. All Others (KL74C=RF)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>↓</strong></td>
<td><strong>GO TO KL84CKPT</strong></td>
<td><strong>GO TO KL84 END RULE</strong></td>
</tr>
</tbody>
</table>

KL83A. **(CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [[(Respondent)]]**

Between [PYIWDATE] and now, how many years of school did [you / she / he] complete outside of the U.S.?

1. One year 2. Two years 3. Three years

**(WEB) Between [PYIWDATE] and now, how many years of school did [you / she / he] complete outside of the United States?**

1. One year 2. Two years 3. Three years
KL83B. *(CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

(Between [PYIWDATE] and now,) what was the highest degree or certificate [you / she / he] earned outside the U.S.?

String 100

*(WEB)* Between [PYIWDATE] and now, what was the highest degree or certificate [you / she / he] earned outside the United States?

String 100

KL84CKPT. CAI Checkpoint: Whether SP/RP Still in School

<table>
<thead>
<tr>
<th>1. Still in School (KL74=2 or KL78BMO=96 or KL78BYR=9996)</th>
<th>5. All Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO KL84A</td>
<td></td>
</tr>
</tbody>
</table>

KL84. *(CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

[Are you / Is she / Is he] currently attending or enrolled in regular school? (Regular school includes high school and schooling that leads to a college or professional school degree.)

<table>
<thead>
<tr>
<th>1. Yes</th>
<th>5. No</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO KL84A END RULE</td>
<td></td>
</tr>
</tbody>
</table>

GO TO KL84A

*(WEB)* [Are you / Is she / Is he] currently attending or enrolled in regular school? 
Regular school includes high school and schooling that leads to a college or professional school degree.

<table>
<thead>
<tr>
<th>1. Yes</th>
<th>5. No</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO KL84A END RULE</td>
<td></td>
</tr>
</tbody>
</table>

GO TO KL84A

KL84A. *(CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE] [(Respondent)]

*[KL84CKPT=STILL IN SCHOOL]*: Earlier you said [you are / [SPOUSE-PARTNER] is / [REFERENCE PERSON] is] still in school.)

What grade or year [are you / is she / is he] currently attending?

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>11. Eleventh grade</td>
<td>12. 12th grade or working toward GED</td>
<td>13. 1st year of college (freshman)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>14. 2nd year of college (sophomore)</td>
<td>15. 3rd year of college (junior)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16. 4th year of college (senior)</td>
<td>17. 5th year of college or higher</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18. Post-graduate work</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*(WEB)* *[KL84CKPT=STILL IN SCHOOL]*: Earlier you reported that [you are / [SPOUSE-PARTNER] is / [REFERENCE PERSON] is] still in school.)

What grade or year [are you / is she / is he] currently attending?

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>11. Eleventh grade</td>
<td>12. 12th grade or working toward GED</td>
<td>13. 1st year of college (freshman)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>14. 2nd year of college (sophomore)</td>
<td>15. 3rd year of college (junior)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16. 4th year of college (senior)</td>
<td>17. 5th year of college or higher</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18. Post-graduate work</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

End KL
KL84A END RULE: Whether This is Spouse-Partner or Reference Person Loop

**Spouse-Partner (KL1ACKPT1.CODE=3)** → REPEAT SECTION KL for Reference Person; Then GO TO IMMIGRANT SECTION

**Reference Person (KL1ACKPT2.CODE=4)** → GO TO IMMIGRANT SECTION

End SECTION_KL
Section M: Philanthropy; Religious Attendance

SECTION_M

M1 RULE: Who is Respondent

R=RP, SP (RESPONDENT=1, 2, 3)  R=OFUM, Proxy (RESPONDENT=4, 7) → GO TO INTERVIEW CLOSE

Donations

MINTRO. *(CATI ONLY)* Next, we will be talking about donations to charitable organizations. Donations include money, assets, property or goods, whether made directly to the organization, through payroll deduction, or on the internet, such as crowdfunding. “Family” means your family living there with you.

• ENTER [1] to continue

1. Continue

Religious Charities

M2. *(CATI)* During [PYEAR], did you [>1 FU MEMBER: or anyone in your family] make donations totaling more than $10 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. We will be asking you about those donations next.

1. Yes  5. No → GO TO M3

GO TO M2A

*(WEB)* Next, we will be talking about donations to charitable organizations. Donations include money, assets, property or goods, whether made directly to the organization, through payroll deduction, or on the internet, such as crowdfunding. “Family” means your family living there with you.

During [PYEAR], did you [>1 FU MEMBER: or anyone in your family] make donations TOTALING more than $10 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. We will be asking you about those donations next.

1. Yes  5. No → GO TO M3

GO TO M2A

M2A. *(CATI)* Altogether, what was the total dollar value of all donations you [>1 FU MEMBER: and your family] made in [PYEAR] towards religious purposes?

$ 1 – 999,997 → GO TO M3  DK/RF → GO TO M2B

*(WEB)* Altogether, what was the total dollar value of all donations you [>1 FU MEMBER: and your family] made in [PYEAR] towards RELIGIOUS PURPOSES?

$ 1 – 999,997 .00 → GO TO M3  NA → GO TO M2BM2F_W

CHECK: Please enter a number from 1 to 999997.

M2B. *(CATI ONLY)* Was it $500 or more?

1. Yes  5. No DK/RF → GO TO M3
M2C. (CATI ONLY) Was it $1,000 or more?
1. Yes  5. No  DK/RF
      GO TO M3

M2F. (CATI ONLY) Was it $250 or more?
1. Yes  5. No  DK/RF
      GO TO M3

M2D. (CATI ONLY) Was it $2,500 or more?
1. Yes  5. No  DK/RF
      GO TO M3

M2E. (CATI ONLY) Was it $5,000 or more?
1. Yes  5. No  DK/RF
      GO TO M3

M2BM2F_W. (WEB ONLY) What is your best estimate?
1. Less than $250  2. $250 to less than $500
3. $500 to less than $1,000  4. $1,000 to less than $2,500
5. $2,500 to less than $5,000  6. $5,000 or more

Combination, People in Need, Medical Research & International Aid

M3. (CATI) [M2=YES: Not counting the donations you already told me about, (during [PYEAR],)] / ALL OTHERS: (During [PYEAR],)] did you [>1 FU MEMBER: or anyone in your family] donate more than $10 to any organization that served a combination of purposes, such as the United Way, Jewish Federations, Catholic Charities, your local community foundation, or community organizations or service clubs?
- INCLUDE donations to the Red Cross to help people in the U.S.
- Donations to the Red Cross to help people in other countries should be reported later at M11 (organizations that provide international aid)

(WEB) [M2=YES: Not counting the donations you already told me about, during [PYEAR], / ALL OTHERS: During [PYEAR],)] did you [>1 FU MEMBER: or anyone in your family] donate more than $10 to any organization that served a COMBINATION OF PURPOSES, such as the United Way, Jewish Federations, Catholic Charities, your local community foundation, or community organizations or service clubs? This includes donations to the Red Cross to help people in the U.S.
We will ask about donations to the Red Cross to help people in OTHER countries later.
1. Yes  5. No  → GO TO M4

M3A. (CATI) Altogether, what was the total dollar value of all donations you [>1 FU MEMBER: and your family] made in [PYEAR] towards combined purpose funds?
$ 1 – 999,997  → GO TO M4  DK/RF  → GO TO M3B

(WEB) Altogether, what was the total dollar value of all donations you [>1 FU MEMBER: and your family] made in [PYEAR] towards COMBINED PURPOSE FUNDS? This includes donations to the Red Cross to help people in the U.S.
We will ask about donations to the Red Cross to help people in OTHER countries later.
$ 1 – 999,997 .00  → GO TO M4  NA  → GO TO M3BM3F_W
CHECK: Please enter a number from 1 to 999997.

M3B. (CATI ONLY) Was it $200 or more?
M3C. (CATI ONLY) Was it $500 or more?  
1. Yes  
5. No  
DK/RF → GO TO M4

M3D. (CATI ONLY) Was it $1,000 or more?  
1. Yes  
5. No  
DK/RF → GO TO M4

M3E. (CATI ONLY) Was it $2,000 or more?  
1. Yes  
5. No  
DK/RF → GO TO M4

M3BM3F_W. (WEB ONLY) What is your best estimate?  
1. Less than $100  
2. $100 to less than $200  
3. $200 to less than $500  
4. $500 to less than $1,000  
5. $1,000 to less than $2,000  
6. $2,000 or more

M4. (CATI) ([M2 OR M3=YES: Not counting the donations you already told me about, (during [PYEAR],) / ALL OTHERS: (During [PYEAR],) did you [>1 FU MEMBER: or anyone in your family]) donate more than $10 to organizations that help people in need of food, shelter, or other basic necessities?  
(WEB) [M2 OR M3=YES: Not counting the donations you already told me about, during [PYEAR], / ALL OTHERS: During [PYEAR],] did you [>1 FU MEMBER: or anyone in your family] donate more than $10 to organizations that HELP PEOPLE in NEED of FOOD, SHELTER, or other BASIC NECESSITIES?  
1. Yes  
5. No  
→ GO TO M5

M4A. (CATI) Altogether, what was the total dollar value of all donations you [>1 FU MEMBER: and your family] made in [PYEAR] to organizations that help people in need of basic necessities?  
$ 1 – 999,997 → GO TO M5  
DK/RF → GO TO M4B  
CHECK: Please enter a number from 1 to 999997.

M4B. (CATI ONLY) Was it $200 or more?  
1. Yes  
5. No  
DK/RF → GO TO M5

M4C. (CATI ONLY) Was it $500 or more?  
1. Yes  
5. No  
DK/RF → GO TO M5

M4D. (CATI ONLY) Was it $1,000 or more?  
1. Yes  
5. No  
DK/RF → GO TO M5
M4E. *(CATI ONLY)* Was it $2,000 or more?

1. Yes  5. No  DK/RF

GO TO M5

M4BM4F.W. *(WEB ONLY)* What is your best estimate?

<table>
<thead>
<tr>
<th>1. Less than $100</th>
<th>2. $100 to less than $200</th>
</tr>
</thead>
<tbody>
<tr>
<td>3. $200 to less than $500</td>
<td>4. $500 to less than $1,000</td>
</tr>
<tr>
<td>5. $1,000 to less than $2,000</td>
<td>6. $2,000 or more</td>
</tr>
</tbody>
</table>

M5. *(CATI)* [(ANY M2-M4=YES: Not counting the donations you already told me about, (during [PYEAR],) / ALL OTHERS: (During [PYEAR],)] did you [>1 FU MEMBER: or anyone in your family]) donate more than $10 to health care or medical research organizations, such as hospitals, nursing homes, mental health facilities, cancer, heart and lung associations, or telethons?

*(WEB)* [(ANY M2-M4=YES: Not counting the donations you already told me about, during [PYEAR],) / ALL OTHERS: During [PYEAR],] did you [>1 FU MEMBER: or anyone in your family] donate more than $10 to HEALTH CARE or MEDICAL RESEARCH organizations, such as hospitals, nursing homes, mental health facilities, cancer, heart and lung associations, or telethons?

1. Yes  5. No

↓

M5A. *(CATI)* Altogether, what was the total dollar value of all donations you [>1 FU MEMBER: and your family] made in [PYEAR] towards health care or medical research organizations?

$ 1 – 999,997 → GO TO M6  DK/RF → GO TO M5B

*(WEB)* Altogether, what was the total dollar value of all donations you [>1 FU MEMBER: and your family] made IN [PYEAR] towards HEALTH CARE or MEDICAL RESEARCH organizations?

$ 1 – 999,997 .00 → GO TO M6  NA → GO TO M5BM5F_W

CHECK: Please enter a number from 1 to 999997.

M5B. *(CATI ONLY)* Was it $200 or more?

1. Yes  5. No  DK/RF

M5C. *(CATI ONLY)* Was it $500 or more?

1. Yes  5. No  DK/RF

GO TO M6

M5F. *(CATI ONLY)* Was it $100 or more?

1. Yes  5. No  DK/RF

GO TO M6

M5D. *(CATI ONLY)* Was it $1,000 or more?

1. Yes  5. No  DK/RF

GO TO M6

M5E. *(CATI ONLY)* Was it $2,000 or more?

1. Yes  5. No  DK/RF

GO TO M6

M5BM5F.W. *(WEB ONLY)* What is your best estimate?
M6. (CATI) [(ANY M2-M5=YES: Not counting the donations you already told me about, (during [PYEAR]),) / ALL OTHERS: (During [PYEAR],)] did you (>1 FU MEMBER: or anyone in your family]) donate more than $10 towards educational purposes, such as colleges, grade schools, PTAs, libraries, or scholarship funds? Please do not count direct tuition payments for you or other family members.

(WEBS) [(ANY M2-M5=YES: Not counting the donations you already told me about, during [PYEAR],) / ALL OTHERS: During [PYEAR],] did you (>1 FU MEMBER: or anyone in your family) donate more than $10 towards EDUCATIONAL purposes, such as colleges, grade schools, PTAs, libraries, or scholarship funds? Please do not count direct tuition payments for you or other family members.

1. Yes  5. No → GO TO M7

M6A. (CATI) Altogether, what was the total dollar value of all donations you (>1 FU MEMBER: and your family) made in [PYEAR] towards educational purposes?

$ 1 – 999,997 → GO TO M7  DK/RF → GO TO M6B

(WEBS) Altogether, what was the total dollar value of all donations you (>1 FU MEMBER: and your family) made in [PYEAR] towards EDUCATIONAL purposes?

$ 1 – 999,997 .00 → GO TO M7  NA → GO TO M6BM6F_W

CHECK: Please enter a number from 1 to 999997.

M6B. (CATI ONLY) Was it $200 or more?

1. Yes  5. No  DK/RF → GO TO M7

M6C. (CATI ONLY) Was it $500 or more?  M6F. (CATI ONLY) Was it $100 or more?

1. Yes  5. No  DK/RF 1. Yes  5. No  DK/RF → GO TO M7

M6D. (CATI ONLY) Was it $1,000 or more?

1. Yes  5. No  DK/RF → GO TO M7

M6E. (CATI ONLY) Was it $2,000 or more?

1. Yes  5. No  DK/RF → GO TO M7

M6BM6F_W. (WEB ONLY) What is your best estimate?

1. Less than $100  2. $100 to less than $200
3. $200 to less than $500  4. $500 to less than $1,000
5. $1,000 to less than $2,000  6. $2,000 or more
M7. (CATI) [(ANY M2-M6=YES: Not counting the donations you already told me about, during [PYEAR],)] / ALL OTHERS: (During [PYEAR],) did you (>1 FU MEMBER: or anyone in your family) donate more than $10 to organizations that provide youth or family services, such as scouting, boys’ and girls’ clubs, sports leagues, Big Brothers or Sisters, foster care, or family counseling?

(WEBCATI) [(ANY M2-M6=YES: Not counting the donations you already told me about, during [PYEAR],)] / ALL OTHERS: During [PYEAR], did you (>1 FU MEMBER: or anyone in your family) donate more than $10 to organizations that provide YOUTH or FAMILY SERVICES, such as scouting, boys’ and girls’ clubs, sports leagues, Big Brothers or Big Sisters, foster care, or family counseling?

1. Yes 5. No → GO TO M8

↓

M7A. (CATI) Altogether, what was the total dollar value of all donations you (>1 FU MEMBER: and your family) made in [PYEAR] towards youth and family services purposes?

$ 1 – 999,997 → GO TO M8  DK/RF → GO TO M7B

(WEBCATI) Altogether, what was the total dollar value of all donations you (>1 FU MEMBER: and your family) made IN [PYEAR] towards YOUTH and FAMILY SERVICES purposes?

$ 1 – 999,997 .00 → GO TO M8  NA → GO TO M7BM7F_W

CHECK: Please enter a number from 1 to 999997.

M7B. (CATI ONLY) Was it $200 or more?

1. Yes 5. No  DK/RF → GO TO M8

↓

M7C. (CATI ONLY) Was it $500 or more?

1. Yes 5. No  DK/RF → GO TO M8

↓

M7D. (CATI ONLY) Was it $1,000 or more?

1. Yes 5. No  DK/RF → GO TO M8

↓

M7E. (CATI ONLY) Was it $2,000 or more?

1. Yes 5. No  DK/RF

GO TO M8

M7BM7F_W. (WEB ONLY) What is your best estimate?

1. Less than $100  2. $100 to less than $200
3. $200 to less than $500  4. $500 to less than $1,000
5. $1,000 to less than $2,000  6. $2,000 or more

M8. (CATI) [(ANY M2-M7=YES: Not counting the donations you already told me about, during [PYEAR],)] / ALL OTHERS: (During [PYEAR],) did you (>1 FU MEMBER: or anyone in your family) donate more than $10 to organizations that support or promote the arts or culture, such as a museum, theatre, orchestra, public broadcasting, or organizations that preserve and celebrate cultural diversity and ethnic heritage?

(WEBCATI) [(ANY M2-M7=YES: Not counting the donations you already told me about, during [PYEAR],)] / ALL OTHERS: During [PYEAR], did you (>1 FU MEMBER: or anyone in your family) donate more than $10 to
organizations that support or promote the ARTS or CULTURE, such as a museum, theatre, orchestra, public broadcasting, or organizations that preserve and celebrate CULTURAL DIVERSITY and ETHNIC HERITAGE?

1. Yes 5. No → GO TO M10

M8A. (CATI) Altogether, what was the total dollar value of all donations you [>1 FU MEMBER: and your family] made in [PYEAR] towards the arts, culture, or ethnic heritage?

$ 1 – 999,997 → GO TO M10 DK/RF → GO TO M8B

(WEB) Altogether, what was the total dollar value of all donations you [>1 FU MEMBER: and your family] made IN [PYEAR] towards the ARTS, CULTURE, or ETHNIC HERITAGE?

$ 1 – 999,997 .00 → GO TO M10 NA → GO TO M8BM8F_W

CHECK: Please enter a number from 1 to 999997.

M8B. (CATI ONLY) Was it $200 or more?

1. Yes 5. No DK/RF → GO TO M10

M8C. (CATI ONLY) Was it $500 or more?

1. Yes 5. No DK/RF

M8D. (CATI ONLY) Was it $1,000 or more?

1. Yes 5. No DK/RF

M8E. (CATI ONLY) Was it $2,000 or more?

1. Yes 5. No DK/RF

M8BM8F_W. (WEB ONLY) What is your best estimate?

1. Less than $100 2. $100 to less than $200

3. $200 to less than $500 4. $500 to less than $1,000

5. $1,000 to less than $2,000 6. $2,000 or more

M10. (CATI) ([ANY M2-M8=YES: Not counting the donations you already told me about, (during [PYEAR]),] / ALL OTHERS: [During [PYEAR],]) did you [>1 FU MEMBER: or anyone in your family]) donate more than $10 to organizations that preserve the environment, such as conservation efforts, animal protection, or parks?

1. Yes 5. No → GO TO M13

(WEB) [ANY M2-M8= YES: Not counting the donations you already told me about, during [PYEAR],] / ALL OTHERS: During [PYEAR],] did you [>1 FU MEMBER: or anyone in your family] donate more than $10 to organizations that preserve the ENVIRONMENT, such as conservation efforts, animal protection, or parks?

1. Yes 5. No → GO TO M13
M10A. **(CATI)** Altogether, what was the total dollar value of all donations you [>1 FU MEMBER: and your family] made in [PYEAR] towards preserving the environment?

\[ \begin{array}{c}
$1 - 999,997 \rightarrow \text{GO TO M11} \\
\text{DK/RF} \rightarrow \text{GO TO M10B}
\end{array} \]

**WEB** Altogether, what was the total dollar value of all donations you [>1 FU MEMBER: and your family] made in [PYEAR] towards preserving the environment?

\[ \begin{array}{c}
$1 - 999,997.00 \rightarrow \text{GO TO M11} \\
\text{NA} \rightarrow \text{GO TO M10BM10F_W}
\end{array} \]

CHECK: Please enter a number from 1 to 999997.

M10B. **(CATI ONLY)** Was it $200 or more?

\[ \begin{array}{ll}
1. \text{Yes} & 5. \text{No} \rightarrow \text{GO TO M11} \\
\downarrow & \\
\text{M10C. (CATI ONLY) Was it $500 or more?} & \text{M10F. (CATI ONLY) Was it $100 or more?} \\
1. \text{Yes} & 1. \text{Yes} \\
5. \text{No} & 5. \text{No} \\
\rightarrow \text{GO TO M11} & \rightarrow \text{GO TO M11} \\
\end{array} \]

M10D. **(CATI ONLY)** Was it $1,000 or more?

\[ \begin{array}{ll}
1. \text{Yes} & 5. \text{No} \rightarrow \text{GO TO M11} \\
\downarrow & \\
\text{M10E. (CATI ONLY) Was it $2,000 or more?} & \\
1. \text{Yes} & 5. \text{No} \rightarrow \text{GO TO M11} \\
\end{array} \]

M10BM10F_W. **(WEB ONLY)** What is your best estimate?

\[ \begin{array}{llll}
1. \text{Less than $100} & 2. \text{$100 to less than $200} & 3. \text{$200 to less than $500} & 4. \text{$500 to less than $1,000} & 5. \text{$1,000 to less than $2,000} & 6. \text{$2,000 or more}
\end{array} \]

**Environment Preservation Donations**

M11. **(CATI)** [ANY M2-M10=YES: Not counting the donations you already told me about, (during [PYEAR]), ALL OTHERS: (During [PYEAR]),] did you [>1 FU MEMBER: or anyone in your family] donate more than $10 to organizations that provide international aid or promote world peace, such as international children’s funds, disaster relief, or human rights?

- **INCLUDE donations to the Red Cross to help people in countries other than the U.S.**

**WEB** [ANY M2-M10=YES: Not counting the donations you already told me about, during [PYEAR], ALL OTHERS: During [PYEAR],] did you [>1 FU MEMBER: or anyone in your family] donate more than $10 to organizations that provide INTERNATIONAL AID or promote WORLD PEACE, such as international children’s funds, disaster relief, or human rights?

This includes donations to the Red Cross to help people in countries OTHER than the U.S.

\[ \begin{array}{ll}
1. \text{Yes} & 5. \text{No} \rightarrow \text{GO TO M12} \\
\downarrow & \\
\text{M11A. (CATI) Altogether, what was the total dollar value of all donations you [>1 FU MEMBER: and your family] made in [PYEAR] towards providing international aid or promoting world peace?} \\
o \text{INCLUDE donations to the Red Cross to help people in countries other than the U.S.}
\end{array} \]
Altogether, what was the total dollar value of all donations you and your family made in [PYEAR] towards providing INTERNATIONAL AID or promoting WORLD PEACE?

$1–999,997

CHECK: Please enter a number from 1 to 999997.

M11B. (CATI ONLY) Was it $200 or more?

1. Yes

5. No

DK/RF

→ GO TO M12

M11C. (CATI ONLY) Was it $500 or more?

1. Yes

5. No

DK/RF

→ GO TO M12

M11D. (CATI ONLY) Was it $1,000 or more?

1. Yes

5. No

DK/RF

→ GO TO M12

M11E. (CATI ONLY) Was it $2,000 or more?

1. Yes

5. No

DK/RF

→ GO TO M12

M11BM11F_W. (WEB ONLY) What is your best estimate?

1. Less than $100

2. $100 to less than $200

3. $200 to less than $500

4. $500 to less than $1,000

5. $1,000 to less than $2,000

6. $2,000 or more

Other

M12. (CATI) [M2-M11=NO]: Not counting the donations you already told me about, during [PYEAR], did you or anyone in your family make donations totaling more than $10 of money, assets, or property to charitable organizations with purposes other than those I already asked about?

1. Yes

5. No

→ GO TO M56A

GO TO M12A

M12A. (CATI) 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
(WEB) What was the main purpose or cause supported by that organization? What does this organization do?

String 200

M12B. (CATI) Altogether, what was the total dollar value of all donations you [and your family] made in [PYEAR] towards [this / these] purpose(s)?

|$ 1 – 999,997| → GO TO M56A  DK/RF → GO TO M12C

(WEBC) Altogether, what was the total dollar value of all donations you [>1 FU MEMBER: and your family] made IN [PYEAR] towards (THIS PURPOSE/THESE PURPOSES)?

|$ 1 – 999,997  .00| → GO TO M56A  NA → GO TO M12CM12G_W

CHECK: Please enter a number from 1 to 999997.

M12C. (CATI ONLY) Was it $200 or more?

1. Yes

M12D. (CATI ONLY) Was it $500 or more?

1. Yes  5. No  DK/RF → GO TO M56A

M12G. (CATI ONLY) Was it $100 or more?

1. Yes  5. No  DK/RF → GO TO M56A

M12E. (CATI ONLY) Was it $1,000 or more?

1. Yes  5. No  DK/RF → GO TO M56A

M12F. (CATI ONLY) Was it $2,000 or more?

1. Yes  5. No  DK/RF → GO TO M56A

M12CM12G_W. (WEB ONLY) What is your best estimate?

1. Less than $100  2. $100 to less than $200

3. $200 to less than $500  4. $500 to less than $1,000

5. $1,000 to less than $2,000  6. $2,000 or more

Religious Attendance

M56A_AQSN. AQSN of Reference Person. Assigned.

M56A, M56B. (CATI) [CYNAMF] [CYNAML], [CYAQRTH], [CYFUHU], Age: [AGEIWDATE], [Respondent])

And finally, during the year [PYEAR], on average, how often did [you / [REFERENCE PERSON]] go to religious services?

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

|$ 0| → GO TO M57CKPT  1 – 97  DK/RF → GO TO M57CKPT

The amount entered is: [M56A] per ____
SELECT the unit of time below

7. Other - specify (M56BSPEC. Specify. (String 100))

And finally, during the year [PYEAR], on average, how often did [you / [REFERENCE PERSON]] go to religious services?

0 – 97 Times per  2. Day  3. Week  4. Two weeks  5. Month  6. Year
CHECK: Please enter a number from 0 to 97.

SIGNAL: Please select a unit of time.

M57CKPT. CAI Checkpoint: Whether Spouse-Partner in FU (CYFUHU=FU, FUMI & CYAQRTH=201-222)

1. Spouse-Partner  5. No Spouse-Partner → GO TO INTERVIEW CLOSE

M57A_AQSN. AQSN of Spouse-Partner. Assigned.

M57A, M57B. (CATI) [CYNAMF] [CYNAML], [CYAQRTH], [CYFUHU], Age: [AGEIWDATE], [[Respondent]]
During the year [PYEAR], on average, how often did [you / [SPOUSE-PARTNER]] go to religious services?

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

0 → GO TO INTERVIEW CLOSE  1 – 97 DK/RF → GO TO INTERVIEW CLOSE

The amount entered is: [M57A] per ____

• SELECT the unit of time below

7. Other - specify (M57BSPEC. Specify. (String 100))

GO TO INTERVIEW CLOSE

(WEB) During the year [PYEAR], on average, how often did [you / [SPOUSE-PARTNER]] go to religious services?

0 – 97 Times per  2. Day  3. Week  4. Two weeks  5. Month  6. Year
CHECK: Please enter a number from 0 to 97.

SIGNAL: Please select a unit of time.

GO TO INTERVIEW CLOSE

End SECTION_M
Q1. *(CATI)* Thank you, that concludes the interview portion of my call. Now, I just need to verify some information that will help us contact [you / this family] in the future.

- ENTER [1] to continue

**GO TO ADDRESS UPDATE & PAYMENT SECTION**

*(WEB)* You have finished the main portion of the interview. Thank you very much for your participation! Please click “Next” to continue.

**GO TO WEB DEBRIEFING SECTION**

End IWCLOSE
WEB Respondent Debriefing

WEBDEBRIEF

DBINTRO. We would greatly appreciate if you helped us by answering a few more questions about your experience completing this interview. Will you answer a few more questions?

1. Yes  5. No → GO TO ADDRPAYMENT SECTION

↓

DB1A. We wanted to give you a final chance to add any information that might have been missed in your interview. Is there anyone else living in this household that you need to add?

1. Yes  5. No → GO TO DB1C

↓

DB1B. Please tell me about this person (or persons) including their name or nickname, current age, and their relationship to [REFERENCE PERSON].

Open End

DB1C. Is there a job that someone living in this household worked in the last two years that you need to add?

1. Yes  5. No → GO TO DB1E

↓

DB1D. Please tell me about that job or jobs. Please include whether it is a current job, start and end dates, what they did at that job, the employer, how many hours a week they worked, and how much they earned at that job for the last two years.

Open End

DB1E. Is there anything else you want to add to your interview?

Open End

DB4. Did you experience any technical problems while completing the survey?

1. Yes  5. No → GO TO DB6

↓

DB5. What problems did you experience?

Please select all that apply.

1. Interview moved slowly
2. Screen froze temporarily, but I was eventually able to continue
3. Screen froze and I had to log back into the interview
4. My connection dropped temporarily, but I was eventually able to continue
5. My connection dropped and I had to log back into the interview
6. I had trouble with next and previous buttons
9. I had trouble using drop-down response options 10. I had trouble scrolling
11. I had trouble switching from web to telephone or from telephone to web
97. Other – Please specify: (DB5SPEC (String 100))

DB6. Please tell us about any questions that you felt were difficult to answer.

Open End
DB14A. Did you switch - either from web to telephone or from telephone to web - to complete the interview?

1. Yes  5. No  -> GO TO DB15

↓

DB14B. Why did you switch?

Open End

DB14E. Did you have any problems or technical difficulties making the switch?

1. Yes  5. No  -> GO TO DB15

↓

DB14F. Please tell us about any problems or technical difficulties you had switching from web to telephone or from telephone to web?

Open End

DB15. Do you have any suggestions about how we can improve your experience taking this interview?

Open End

GO TO ADDRESS UPDATE & PAYMENT SECTION

End WEBDEBRIEF
Address Updates; Payment

**TOC**

**xEPDISPLAY**

1. Electronic payment allowed 0. All others (default)

**ADDRPAYMENT**

WTRPREPAID. Whether interview was prepaid (WTRPREPAIDLOAD)

- 1. Interview was prepaid
- 5. Interview was not prepaid

\[t_{Sample\_line.vExt\_026; initial\ setting=5; if\ payment\ is\ prepaid, WtrPrePaidLoad=1}.\]

AMTPREPAID. Prepayment Amount (AMTPREPAIDLOAD)

- 0.00 – 999.00

\[t_{Sample\_line.vExt\_027; initial\ setting=$0.00; if\ payment\ is\ prepaid, AmtPrePaidLoad==$ amount\ of\ prepayment}.\]

PAYMENT. Standard Payment Amount (PAYMENTLOAD)

- 0.00 – 999.00

\[t_{Sample\_line.vExt\_028; initial\ setting=$80.00\ for\ Reinterview\ and\ $100.00\ for\ Recontact, Splitoff,\ and\ Immigrant;\ if\ standard\ payment\ is\ increased\ and\ interview\ has\ not\ progressed\ to\ the\ address/payment\ section\ yet,\ PaymentLoad=new\ $ amount\ of\ standard\ payment}.\]

**RPAY1. CAI Checkpoint: Who is Respondent**

1. R=RP, SP, OFUM (RESPONDENT=1, 2, 3, 4) → GO TO RPAY2A
2. R=Proxy (RESPONDENT=7)

**Proxy Respondent**

**RPAY1A. (CATI)** You will receive $[PAYMENT] from the University of Michigan in appreciation of your help. In order for the University to send your payment or other correspondence, I must make sure that I have your correct name and mailing address.

- ENTER [1] to continue

1. Continue → GO TO PROXYADDR Block

**WEB** You will receive $[PAYMENT] from the University of Michigan in appreciation of your help. Please click “Next” to enter your name and contact information.

1. Next → GO TO PROXYADDR Web Grid

**ADDRPAYMENT.PROXYADDR**

**NOTE for CATI Interviews:** If Proxy Respondent information has already been entered into MSMS, the data are pulled into the corresponding Blaise fields and updated by interviewer as needed.

**ADDRTYPE. Which address. Assigned.**

1. Proxy R

**TITLE, NAMF, NAMM, NAML, SUFFIX, CNTRYCODE (COUNTRY), INCO, ADDR1, APTSTE, ADDR2, CITY, STCODE (STATE), ZIP. (CATI) Title -- e.g. “Mr”, “Mrs”, “Ms”, “Miss”, “Dr”**
What is your complete name and mailing address?
- If no title, PRESS [Enter] to continue
- Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

**String 6**

First Name
- Ctrl-D and Ctrl-R not allowed

**String 20** CHECK for DK, RF, or DON’T KNOW entered: A valid address is required in order for us to make a payment, including name, address line 1, city, state, sip/postal code and country. This payment will not be made until this information is provided.

Middle Name
- Ask for Middle Name but do not probe DK or RF
- If none, PRESS [Enter] to continue
- Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

**String 20**

Last Name
- Ctrl-D and Ctrl-R not allowed

**String 20** CHECK for DK, RF, or DON’T KNOW entered: A valid address is required in order for us to make a payment, including name, address line 1, city, state, sip/postal code and country. This payment will not be made until this information is provided.

Suffix -- e.g. “Sr”, “Jr
- If none, PRESS [Enter] to continue
- Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

**String 20**

Country
What is your mailing address?
- ENTER [185 UNITED STATES] for Puerto Rico, U.S. Virgin Islands, Guam, American Samoa or the Northern Marianas

Select 1 – 193 (Defaults to 185/US)

In Care Of
Is there an “in care of” for this address?
- If none, PRESS [Enter] to continue
- Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

**String 40**

Address 1
- IF R says the mailing address contains both a street address and PO Box: ENTER street address here (Address 1) and ENTER PO Box in Address 2
- Ctrl-D and Ctrl-R not allowed

**String 40** CHECK for DK, RF, or DON’T KNOW entered: A valid address is required in order for us to make a payment, including name, address line 1, city, state, sip/postal code and country. This payment will not be made until this information is provided.

Apt/Suite
- If none, PRESS [Enter] to continue
- ENTER [Apt] or [Ste] plus numbers and /or letters
- Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

**String 10**
Address 2
- IF R says the mailing address contains both a street address and PO Box: ENTER PO Box here (Address 2)
- If none, PRESS [Enter] to continue
- Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 40
City
- Ctrl-D and Ctrl-R not allowed

String 40
CHECK for DK, RF, or DON'T KNOW entered: A valid address is required in order for us to make a payment, including name, address line 1, city, state, sip/postal code and country. This payment will not be made until this information is provided.

State (For COUNTRY=185)
Select \[1 – 57 (Assigned 57/FC if Country<>185)

Zip Code
- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER all [0]'s

String 10
End PROXYADDR

ADDRPAYMENT.PROXYPH

ADDRTYPE. Which phone. Assigned.

1. Proxy R

WTRCELL. (CATI) Do you have a cell phone?
- Do NOT ask but ENTER [1] if you know R is using a cell phone
- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER [5]

1. Yes 5. No → GO TO WTRHOME

CELLPH. (CATI) Cell Phone - Area Code and Telephone Number
What is the area code and phone number?
- If foreign phone, PRESS [ENTER] to go to foreign phone field
- Ctrl-D and Ctrl-R not allowed; For DK/RF, GO BACK and ENTER [5] at previous question
- Please enter this phone number starting with the area code. Do not include a long distance code/prefix 1.

[ENTER] (_ _ _) _ _ _ _ _ _ → GO TO WTRHOME

CELLFOR. (CATI) Cell Phone - Foreign Number
(What is the area code and phone number?)
- Ctrl-D and Ctrl-R not allowed; For DK/RF, GO BACK and ENTER [5] at previous question

String 20

WTRHOME. (CATI) Do you have a home phone?
- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER [5]

1. Yes 5. No → GO TO RPAY1G

HOMEPH. (CATI) Home Phone - Area Code and Telephone Number
What is the area code and phone number?
- If foreign phone, PRESS [ENTER] to go to foreign phone field
- Ctrl-D and Ctrl-R not allowed; For DK/RF, GO BACK and ENTER [5] at previous question
- Please enter this phone number starting with the area code. Do not include a long distance code/prefix 1.

\[\text{[ENTER]} \quad \text{(_ _ _),_ _ - _ _} \rightarrow \text{GO TO RPAY1G}\]

\[\downarrow\]

HOMEFOR. \(\text{(CATI)}\) Home Phone - Foreign Number

(What is the area code and phone number?)

- Ctrl-D and Ctrl-R not allowed; For DK/RF, GO BACK and ENTER [5] at previous question

\[\text{String 20} \rightarrow \text{GO TO RPAY1G}\]

End PROXYPH

RPAY1G. \(\text{(CATI)}\) Is there an email address where we can contact you?

\[\begin{array}{ll}
1. \text{Yes} & 5. \text{No} \\
\rightarrow & \text{GO TO RPAY1FF}
\end{array}\]

\[\downarrow\]

RPAY1H. \(\text{(CATI)}\) (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 go back and ENTER [Ctrl-D, Ctrl-R] at previous question

\[\text{String 50} \rightarrow \text{GO TO RPAY1FF}\]

PROXYADDR Web Grid (PROXYADDR block, PROXYPH block, RPAY1G-RPAY1H). \(\text{(WEB)}\) Please enter your name and contact information below. When you’re finished, please click “Next” to save your information and continue.

In order for the University to send your payment and other correspondence, we need your name and current contact information.

Title \[\text{String 6}\]

First name \[\text{String 20}\]

Middle name \[\text{String 20}\]

Last name \[\text{String 20}\]

Suffix \[\text{String 20}\]

Country \[\text{Select \(\n\)} \quad 1 – 193 (Defaults to 185/US)\]

United States includes Puerto Rico, U.S. Virgin Islands, Guam, American Samoa and the Northern Mariana Islands

In Care Of \[\text{String 40}\]

“In Care Of” is used for mail to be delivered to someone at another person’s address and usually contains the name of the person to whom the address belongs.

Address Line 1 \[\text{String 40}\]

Apartment or Suite \[\text{String 10}\]

Enter “Apt” or “Ste” plus numbers or letters.

Address Line 2 \[\text{String 40}\]

“Address Line 2” is most often used for a room or floor number.

City \[\text{String 40}\]

State \[\text{Select \(\n\)} \quad 1 – 57 (Assigned 57/FC if Country<>185)\]

[Zip / Postal] Code \[\text{String 10}\]

Cell Phone Number \[\text{String 10/20}\] \(\text{(Assign WTRCELL=Yes if RESPONSE)}\)

Please enter this phone number starting with the area code. Do not include a long distance code/prefix 1.
Please enter this phone number starting with the area code. Do not include a long distance code/prefix 1.

(CATI) What is your relationship to [REFERENCE PERSON]?

- 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))

(WEB) What is your relationship to [REFERENCE PERSON]?

- 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-Please Specify: (RPAY1FFSPEC)

FU Member Respondent (or Reference Person, if R=Proxy)

RP2AQN. AQSN of Respondent (or RP, if R=Proxy). Assigned.

1 – 24

RAY2A. (CATI) [NOT PREPAID & R=RP, SP, OFUM: You will receive $[PAYMENT] from the University of Michigan in appreciation of your help. In order for the University to send your payment or other correspondence, I must make sure that I have your correct name and mailing address. / NOT PREPAID & R=PROXY: I would also like to have the correct name and address for [REFERENCE PERSON].] / PREPAID & R=RP, SP, OFUM: In order for the University to keep in touch with you, I must make sure that I have your correct name and mailing address. / PREPAID & R=PROXY: I would also like to have the correct name and address for [REFERENCE PERSON].]

[PREPAID: This interview was PREPAID]

- Verify/Update/Change (R’s/Reference Person’s) mailing address and phone number
- ENTER [1] to continue

1. Continue → GO TO RMailAddr Block

(WEB) [NOT PREPAID & R=RP, SP, OFUM: You will receive $[PAYMENT] from the University of Michigan in appreciation of your help. Please click “Next” to confirm your contact information. / NOT PREPAID & R=PROXY: In order for the University of Michigan to keep in touch with [REFERENCE PERSON], please click “Next” to confirm [his / her] contact information.] / PREPAID & R=RP, SP, OFUM: In order for the University of Michigan to keep in touch with you, please click “Next” to confirm your contact information. / PREPAID & R=PROXY: In order for the University of Michigan to keep in touch with [REFERENCE PERSON], please click “Next” to confirm [his / her] contact information.]

1. Next → GO TO RMailAddr Web Grid

ADDRPAYMENT.RMailAddr Name not prefilled; Address prefilled with RespondentAddr preload

ADDRTYPE. Which address. Assigned.

2. RMailAddr

TITLE, NAMF, NAMM, NAML, SUFFIX, CNTRYCODE (COUNTRY), INCO, ADDR1, APTSTE, ADDR2, CITY, STCODE (STATE), ZIP. (CATI) Title -- e.g. “Mr”, “Mrs”, “Ms”, “Miss”, “Dr”

- If no title, PRESS [Enter] to continue
- Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue
• VERIFY Title of [Respondent / Reference Person]: [CYNAMF] [CYNAML] ([CYAQRTH])

String 6

First Name
• Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]
• VERIFY First Name of [Respondent / Reference Person]: [CYNAMF] [CYNAML] ([CYAQRTH])

String 20

CHECK for DK, RF, or DON'T KNOW entered: A valid address is required in order for us to make a payment, including name, address line 1, city, state, sip/postal code and country. This payment will not be made until this information is provided.

Middle Name
• Ask for Middle Name but do not probe DK or RF
• If none, PRESS [Enter] to continue
• Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue
• VERIFY Middle Name of [Respondent / Reference Person]: [CYNAMF] [CYNAML] ([CYAQRTH])

String 20

Last Name
• Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]
• VERIFY Last Name of [Respondent / Reference Person]: [CYNAMF] [CYNAML] ([CYAQRTH])

String 20

CHECK for DK, RF, or DON'T KNOW entered: A valid address is required in order for us to make a payment, including name, address line 1, city, state, sip/postal code and country. This payment will not be made until this information is provided.

Suffix -- e.g. “Sr”, “Jr”
• If none, PRESS [Enter] to continue
• Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue
• VERIFY Suffix of [Respondent / Reference Person]: [CYNAMF] [CYNAML] ([CYAQRTH])

String 20

Country
[R=RP, SP, OFUM: Now for your complete mailing address, as you would like it to appear on all correspondence from us. / R=PROXY: Now for [REFERENCE PERSON]'s complete mailing address.]
• ENTER [185 UNITED STATES] for Puerto Rico, U.S. Virgin Islands, Guam, American Samoa or the Northern Mariana Islands

Select V 1 – 193 (Defaults to 185/US)

In Care Of
Is there an “in care of” for the address?
• If none, PRESS [Enter] to continue
• Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 40

Address 1
• IF R says the mailing address contains both a street address and PO Box: ENTER street address here (Address 1) and ENTER PO Box in Address 2
• Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 40

CHECK for DK, RF, or DON'T KNOW entered: A valid address is required in order for us to make a payment, including name, address line 1, city, state, sip/postal code and country. This payment will not be made until this information is provided.

Apt/Suite
• If none, PRESS [Enter] to continue
• ENTER [Apt] or [Ste] plus numbers and /or letters
• Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 10

Address 2
• IF R says the mailing address contains both a street address and PO Box: ENTER PO Box here (Address 2)
• If none, PRESS [Enter] to continue
• Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

End RMAILADDR

ADDRPAYMENT.RPHONE Prefilled with NewPreload (R=preloaded RP, SP) or RespondentAddr (All other Rs) preload
AQN. AQSN of Respondent (or RP, if R=Proxy). Assigned.

ADDRTYPE. Which phone. Assigned.
  2. RMailAddr

WTRCELL. (CATI) [Do you / Does [REFERENCE PERSON]] have a cell phone?
  • [R=RP, SP, OFUM: Do NOT ask but ENTER [1] if you know R is using a cell phone]
  • Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER [5]

  1. Yes 5. No → GO TO WTRHOME

CELLPH. (CATI) Cell Phone - Area Code and Telephone Number
  What is the area code and phone number?
  • ASK; or CONFIRM if phone number has been prelisted and this is the same [R=RP, SP, OFUM: Respondent / R=PROXY: Reference Person] as [P2YEAR]
  • If foreign phone, PRESS [ENTER] to go to foreign phone field
  • Ctrl-D and Ctrl-R not allowed; For DK/RF, GO BACK and ENTER [5] at previous question
  • Please enter this phone number starting with the area code. Do not include a long distance
code/prefix 1.

  [ENTER] (_ _ _) _ - _ _ _ _ → GO TO WTRHOME

CELLFOR. (CATI) Cell Phone - Foreign Number
  (What is the area code and phone number?)
  • ASK; or CONFIRM if phone number has been prelisted and this is the same [Respondent / Reference Person] as [P2YEAR]
  • Ctrl-D and Ctrl-R not allowed; For DK/RF, GO BACK and ENTER [5] at previous question

  String 20

WTRHOME. (CATI) [Do you / Does he / Does she] have a home phone?
  • Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER [5]

  1. Yes 5. No → GO TO HSPCKPT

String 40
City
  • Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 40
CHECK for DK, RF, or DON'T KNOW entered: A valid address is required in order for
us to makes a payment, including name, address line 1, city, state, sip/postal code
and country. This payment will not be made until this information is provided.

State (For COUNTRY=185)
  Select 1 – 57 (Assigned 57/FC if Country<>185)

Zip Code
  • Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER all [0]'s

String 10
HOMEPH. (CATI) Home Phone - Area Code and Telephone Number

What is the area code and phone number?

- **ASK; or CONFIRM if phone number has been prelisted and this is the same [Respondent / Reference Person] as [P2YEAR]**
- If foreign phone, PRESS [ENTER] to go to foreign phone field
- Ctrl-D and Ctrl-R not allowed; For DK/RF, GO BACK and ENTER [5] at previous question
- Please enter this phone number starting with the area code. Do not include a long distance code/prefix 1.

\[
\text{[ENTER]} \quad (\_\_\_)\_\_\_\_\_\_\_\_\_\_ \rightarrow \text{GO TO HSPCKPT}
\]

HOMEFOR. (CATI) Home Phone - Foreign Number

(What is the area code and phone number?)

- **ASK; or CONFIRM if phone number has been prelisted and this is the same [Respondent / Reference Person] as [P2YEAR]**
- Ctrl-D and Ctrl-R not allowed; For DK/RF, GO BACK and ENTER [5] at previous question

\[
\text{String 20} \quad \rightarrow \text{GO TO HSPCKPT}
\]

**End RPHONE**

RMAILADDR Web Grid (RMAILADDR block, RPHONE block). (WEB) Please enter \[R=RP, SP, OFUM: your / R=PROXY: REFERENCE PERSON\]'s name and contact information below. When you’re finished, please click “Next” to save your information and continue.

*In order for the University to [PREPAID & R=RP, SP, OFUM, OR R=PROXY: keep in touch with [PREPAID & R=RP, SP, OFUM: you / R=PROXY: [REFERENCE PERSON]] / NOT PREPAID & R=RP, SP, OFUM: send your payment and other correspondence], we need [R=RP, SP, OFUM: your / R=PROXY: [his / her]] name and current contact information.*

**Title**

`String 6`

**First name**

`String 20`

**Middle name**

`String 20`

**Last name**

`String 20`

**Suffix**

`String 20`

**Country**

`Select ✔ 1 – 193 (Defaults to 185/US)`

United States includes Puerto Rico, U.S. Virgin Islands, Guam, American Samoa and the Northern Mariana Islands

**In Care Of**

`String 40`

“In Care Of” is used for mail to be delivered to someone at another person’s address and usually contains the name of the person to whom the address belongs.

**Address Line 1**

`String 40`

**Apartment or Suite**

`String 10`

*Enter “Apt” or “Ste” plus numbers or letters.*

**Address Line 2**

`String 40`

“Address Line 2” is most often used for a room or floor number.

**City**

`String 40`

**State**

`Select ✔ 1 – 57 (Assigned 57/FC if Country<>185)`

**[Zip / Postal] Code**

`String 10`

**Cell Phone Number**

`String 10/20 (Assign WTRCELL=Yes if RESPONSE)`
Please enter this phone number starting with the area code. Do not include a long distance code/prefix 1.

Home Phone Number

Please enter this phone number starting with the area code. Do not include a long distance code/prefix 1.

CHECK for FIRST, LAST, ADDR1, CITY, or STATE=NA: Please enter the following required fields: [ ]

HSPCKPT. CAI Checkpoint: Who is Respondent; Whether Spouse-Partner in FU

<table>
<thead>
<tr>
<th>R=RP (RESPONDENT=1)</th>
<th>3. R=SP (RESPONDENT=2, 3)</th>
<th>4. R=OFUM (RESPONDENT=4)</th>
<th>5. R=Proxy (RESPONDENT=7)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Spouse-Partner</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. No Spouse-Partner</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GO TO RPAY2GCKPT</td>
<td></td>
<td>GO TO</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>TO RPAY2GCKPT</td>
<td></td>
</tr>
</tbody>
</table>

Spouse-Partner of FU Member Respondent (or Reference Person, if R=OFUM)

ADDRPAYMENT.HSPPHONE Cell phone prefilled with NewPreload (preloaded RP, SP) preload
AQSN. AQSN of Spouse-Partner of Respondent (or RP, if R=OFUM). Assigned.

ADDRTYPE. Which phone. Assigned.

9. Spouse-Partner of R, Reference Person

WTRCELL. (CATI) Does \([R=SP, OFUM: [REFERENCE PERSON] / R=RP: [SPOUSE-PARTNER]]\) have a cell phone?
- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER [S]

<table>
<thead>
<tr>
<th>1. Yes</th>
<th>5. No</th>
</tr>
</thead>
<tbody>
<tr>
<td>→ GO TO RPAY2GCKPT</td>
<td></td>
</tr>
</tbody>
</table>

WEB) Does \([R=SP, OFUM: [REFERENCE PERSON] / R=RP: [SPOUSE-PARTNER]]\) have a CELL phone?

<table>
<thead>
<tr>
<th>1. Yes</th>
<th>5. No</th>
</tr>
</thead>
<tbody>
<tr>
<td>→ GO TO RPAY2GCKPT</td>
<td></td>
</tr>
</tbody>
</table>

CELLTYPE_W. (WEB ONLY) Is that ...?

<table>
<thead>
<tr>
<th>1. A U.S. phone number</th>
<th>2. An international phone number</th>
<th>NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>→ GO TO RPAY2GCKPT</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

CELLPH. (CATI) Cell Phone - Area Code and Telephone Number

What is the area code and phone number?
- ASK; or CONFIRM if phone number has been prelisted and this is the same \([R=SP, OFUM: Reference Person / R=RP: Spouse-Partner]\) as [P2YEAR]
- If foreign phone, PRESS [ENTER] to go to foreign phone field
- Ctrl-D and Ctrl-R not allowed; For DK/RF, GO BACK and ENTER [S] at previous question
- Please enter this phone number starting with the area code. Do not include a long distance code/prefix 1.

<table>
<thead>
<tr>
<th>[ENTER]</th>
<th>(_ _ <em>) (</em> _ _ _)</th>
</tr>
</thead>
<tbody>
<tr>
<td>→ GO TO RPAY2GCKPT</td>
<td></td>
</tr>
</tbody>
</table>

GO TO CELLFOR

WEB) What is the area code and phone number?

Cell Phone Number ( _ _ _ _) (_ _ _ _) → GO TO RPAY2GCKPT
CELLFOR. *(CATI)* Cell Phone - Foreign Number  
(What is the area code and phone number?)  
- **ASK; or CONFIRM if phone number has been prelisted and this is the same** [Reference Person / Spouse-Partner] as [P2YEAR]  
- **Ctrl-D and Ctrl-R not allowed; For DK/RF, GO BACK and ENTER [S] at previous question**  

<table>
<thead>
<tr>
<th>String 20</th>
</tr>
</thead>
</table>
| *(WEB)* What is the phone number?  
Cell Phone Number | String 20 |

End HSPPHONE

RPAY2GCKPT. CAI Checkpoint: Who is Respondent

### FU Member Respondent & Spouse-Partner

**ADDRPAYMENT.RPAY2G_H[1..2]** [1]=Respondent (R=RP, SP, OFUM), [2]=Respondent’s spouse or partner (R=RP, SP)  
**EMAILAQSN.** AQSN of Respondent (Respondent’s spouse or partner). Assigned.

**RPAY2G. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE]**

- **[LOOP 2]: R’s 1st Email Address: [[RPAY2H] / No email reported]**  
- **[LOOP 2]: R’s 2nd Email Address: [[RPAY2J] / No email reported]**

Is there an email address where we can contact [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]]?  

| 1. Yes [LOOP 2]: , and is different than R's | 2. Yes, and is same as R's 1st email | 3. Yes, and is same as R's 2nd email | 5. No | → GO TO RPAY2G END RULE |
| Assign RPAY2H=RPAY2H/RPAY2J[1] | |

**GO TO RPAY2I**

Prefilled with NewPreload (R=preloaded RP, SP) or RespondentAddr (All other Rs) preload

**RPAY2H. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE]**

(What is that e-mail address?)  
- **ASK; or CONFIRM if email address has been prelisted and this is the same** [LOOP 1: Respondent / LOOP 2: [Reference Person / Spouse-Partner]] as [P2YEAR]  
- **ENTER email address, then READ BACK and VERIFY with Respondent**  
- **Ctrl-D and Ctrl-R not allowed; For DK/RF go back and ENTER [Ctrl-D, Ctrl-R] at previous question**  

**String 50**

**RPAY2I. *(CATI)* [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE]**

- **[LOOP 2]: R’s 1st Email Address: [[RPAY2H] / No email reported]**  
- **[LOOP 2]: R’s 2nd Email Address: [[RPAY2J] / No email reported]**  
- **[LOOP 2]: Spouse-Partner’s 1st Email Address: [[RPAY2H] / No email reported]**

Is there another email address where we can contact [you / [REFERENCE PERSON] / [SPOUSE-PARTNER]]?  

| 1. Yes [LOOP 2]: , and is different than R's | 2. Yes, and is same as R's 1st email | 3. Yes, and is same as R's 2nd email | 5. No | → GO TO RPAY2G END RULE |
| Assign RPAY2H=RPAY2H/RPAY2J[1] | |

**GO TO RPAY2G END RULE**
Prefilled with NewPreload (R=preloaded RP, SP) or RespondentAddr (All other Rs) preload

RPAY2J. (CATI) [CYNAMF] [CYNAML]: [CYAQRTH], [CYFUHU], Age [AGEIWDATE]

(What is that e-mail address?)
- ASK; or CONFIRM if email address has been prelisted and this is the same [Respondent / [Reference Person / Spouse-Partner]] as [P2YEAR]
- ENTER email address, then READ BACK and VERIFY with Respondent
- Ctrl-D and Ctrl-R not allowed; For DK/RF go back and ENTER [Ctrl-D, Ctrl-R] at previous question

String 50  → GO TO RPAY2G END RULE

RPAY2G_H Web Grid (RPAY2G_H[1..2]). (WEB) Please enter an email address where we can contact [ LOOP 1: you / LOOP 2: [R=SP: [REFERENCE PERSON] / R=RP: [SPOUSE-PARTNER]]. When you’re finished, please click “Next” to save your information and continue.

Email String 50 (Assign RPAY2G=Yes if RESPONSE)
2nd Email String 50 (Assign RPAY2I=Yes if RESPONSE)

RPAY2G END RULE: Who is Respondent; Whether Spouse-Partner in FU

<table>
<thead>
<tr>
<th>R=RP, SP (RESPONDENT=1, 2, 3)</th>
<th>R=OFUM (RESPONDENT=4)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spouse-Partner in FU (CYFUHU=1, 4 &amp; CYAQRTH=201-222)</td>
<td>No Spouse-Partner</td>
</tr>
</tbody>
</table>

End RPAY2G_H

Street/Physical Address

RPAY3A. (CATI) Mailing Address
[RMAILADDR.ADDR1] [RMAILADDR.APTSTE] [RMAILADDR.ADDR2] [RMAILADDR.CITY], [RMAILADDR.STCODE] [RMAILADDR.CNTRYCODE] [RMAILADDR.ZIP / RMAILADDR.ZIPFOR]

Is [R=RP, SP, OFUM: your / R=PROXY: [REFERENCE PERSON]’s] street address where [R=RP, SP, OFUM: you actually live / R=PROXY: [he / she] actually lives] different from the mailing address? (Can you tell me that address?)
- STREET ADDRESS is the address where R/Reference Person ACTUALLY LIVES, which is sometimes different from R/Reference Person’s mailing address
- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER [5]
- If R cannot report the full street address, ENTER [5]

1. Yes  5. No  → GO TO RPAY4PPCKPT

GO TO RPAY3B Block

(WEB) Is [R=RP, SP, OFUM: your / R=PROXY: [REFERENCE PERSON]’s] street address, the address where [R=RP, SP, OFUM: you actually live / R=PROXY: [he / she] actually lives], different from [R=RP, SP, OFUM: your / R=PROXY: [his / her] mailing address?

Mailing address:
[RMAILADDR.ADDR1] [RMAILADDR.APTSTE] [RMAILADDR.ADDR2] [RMAILADDR.CITY], [RMAILADDR.STCODE] [RMAILADDR.CNTRYCODE] [RMAILADDR.ZIP / RMAILADDR.ZIPFOR]

1. Yes, street address is different from mailing address  5. No, street and mailing addresses are the same  → GO TO RPAY4PPCKPT

GO TO RPAY3B Web Grid
Please enter your street address below. When you’re finished, please click “Next” to save your information and continue.

Country
- Enter [185 UNITED STATES] for Puerto Rico, U.S. Virgin Islands, Guam, American Samoa or the Northern Mariana Islands
- In Care Of
- If none, PRESS [Enter] to continue
- Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 40
Address 1
- DO NOT enter PO Box here, since we are asking for a street address. GO BACK to R/Reference Person’s mailing address to enter PO Box
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 40
Address 2
- DO NOT enter PO Box here, since we are asking for a street address. GO BACK to R/Reference Person’s mailing address to enter PO Box
- If none, PRESS [Enter] to continue
- Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 40
City
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 40
State (For COUNTRY=185)
- Select 1 – 57 (Assigned 57/FC if Country<>185)

Zip Code
- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER all [0]’s

String 10

RPAY3B Web Grid (RPAY3B block). (WEB) Please enter [your / [REFERENCE PERSON]’s] street address below. When you’re finished, please click “Next” to save your information and continue.
“In Care Of” is used for mail to be delivered to someone at another person’s address and usually contains the name of the person to whom the address belongs.

Address Line 1

Apartment or Suite

Enter “Apt” or “Ste” plus numbers or letters

Address Line 2

“Address Line 2” is most often used for a room or floor number.

City

State

[Zip / Postal] Code

CHECK for FIRST, LAST, ADDR1, CITY, or STATE=NA: Please enter the following required fields: [ ]

End RPAY3B

Prepayment

RPAY4PPCKPT. CAI Checkpoint: Whether Interview Incentive Was Prepaid

1. Prepaid (WTRPREPAID=1)

5. All Others (WTRPREPAID=5) → GO TO RPAY4A

RPAY4PP. (CATI) Interviewer Checkpoint

- This interview was prepaid $[AMTPREPAID] - was the prepayment received? ASK R if needed.
  - The standard payment amount for this interview is $[PAYMENT]
  - Non-standard payment amounts can be $[PAYMENT] to $[PAYMENT*2]
  - Other payment amounts (e.g., in addition to prepaid amount) can be $1.00 to $[PAYMENT*2]
- Ctrl-D and Ctrl-R not allowed; For DK/RF, ENTER [1]

1. Yes, prepayment received and accepted → (Assign RPAY4A=1) GO TO RPAY5A

2. Yes, prepayment received but a different payment is needed

5. No, prepayment was not received

GO TO RPAY4A

(WEB) Did you receive your $[AMTPREPAID] payment?

1. Yes, I received my payment → (Assign RPAY4A=1) GO TO RPAY5A

5. No, I did not receive my payment

CHECK for NA: Your response is required.

Who Receives Payment

RPAY4A. (CATI) [PREPAID: IWER: This interview was PREPAID $[AMTPREPAID] but R reported the prepayment was not received or a different/additional payment is needed.]

[R=RP, SP, OFUM: You / R=PROXY: As a proxy respondent, you] may accept the [NOT PREPAID: $[PAYMENT] / PREPAID: payment] [R=RP, SP, OFUM: or have it sent / R=PROXY: have it sent to [REFERENCE PERSON], or sent] to someone else of your choosing. Which would you prefer?

- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER [1]

1. Respondent/Proxy accepts payment

R=PROXY: 2. Proxy wishes that Reference Person receive payment

3. Other person receives payment

4. Payment declined (If VOL)

GO TO RPAY4B Block

GO TO RPAY5A

(WEB) You may accept the $[PREPAID AMT > STANDARD PAY AMT: $[AMTPREPAID] / STANDARD PAY AMT >
PREPAID AMT: $[PAYMENT] payment for completing this interview or have it sent to someone else of your choosing. Which would you prefer?

1. Send payment to me  
R=PROXY: 2. Send payment to [REFERENCE PERSON]

GO TO RPAY4B Web Grid  
GO TO RPAY5A

CHECK for NA: Your response is required.

Other Payee

ADDRPAYMENT.RPAY4B

ADDRTYPE. Which address. Assigned.

3. Other Payee

TITLE, NAMF, NAMM, NAML, SUFFIX, CNTRYCODE (COUNTRY), INCO, ADDR1, APTSTE, ADDR2, CITY, STCODE (STATE), ZIP. (CATI) Title -- e.g. “Mr”, “Mrs”, “Ms”, “Miss”, “Dr”

Who would you like to receive the payment?

• If no title, PRESS [Enter] to continue
• Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 6

First Name

• Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 20

CHECK for DK, RF, or DON’T KNOW entered: A valid address is required in order for us to make a payment, including name, address line 1, city, state, zip/postal code and country. This payment will not be made until this information is provided.

Middle Name

• Ask for Middle Name but do not probe DK or RF
• If none, PRESS [Enter] to continue
• Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 20

Last Name

• Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 20

CHECK for DK, RF, or DON’T KNOW entered: A valid address is required in order for us to make a payment, including name, address line 1, city, state, zip/postal code and country. This payment will not be made until this information is provided.

Suffix -- e.g. “Sr”, “Jr

• If none, PRESS [Enter] to continue
• Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 20

Country

To what address should we send the payment?

• ENTER [185 UNITED STATES] for Puerto Rico, U.S. Virgin Islands, Guam, American Samoa or the Northern Mariana Islands

Select ▼ 1 – 193 (Defaults to 185/US)

In Care Of

• If none, PRESS [Enter] to continue
• Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 40

Address 1
• If R says the mailing address contains both a street address and PO Box: ENTER street address here (Address 1) and ENTER PO Box in Address 2
• Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 40 CHECK for DK, RF, or DON'T KNOW entered: A valid address is required in order for us to make a payment, including name, address line 1, city, state, zip/postal code and country. This payment will not be made until this information is provided.

Apt/Suite
• If none, PRESS [Enter] to continue
• ENTER [Apt] or [Ste] plus numbers and/or letters
• Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 10

Address 2
• If R says the mailing address contains both a street address and PO Box: ENTER PO Box here (Address 2)
• If none, PRESS [Enter] to continue
• Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 40

City
• Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 40 CHECK for DK, RF, or DON'T KNOW entered: A valid address is required in order for us to make a payment, including name, address line 1, city, state, zip/postal code and country. This payment will not be made until this information is provided.

State (For COUNTRY=185)
Select ▼ 1 – 57 (Assigned 57/FC if Country<>185)

Zip Code
• Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER all [0]'s

String 10

End RPAY4B

ADDRPAYMENT.OPPHONE

ADDRTYPE. Which phone. Assigned.

3. Other Payee

WTRCELL. (CATI) Does [RPAY4B.NAMF] [RPAY4B.NAML] have a cell phone?
• Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER [S]

1. Yes 5. No → GO TO WTRHOME

CELLPH. (CATI) Cell Phone - Area Code and Telephone Number
What is the area code and phone number?
• If foreign phone, PRESS [ENTER] to go to foreign phone field
• Ctrl-D and Ctrl-R not allowed; For DK/RF, GO BACK and ENTER [5] at previous question
• Please enter this phone number starting with the area code. Do not include a long distance code/prefix 1.

[ENTER] _ _ _ _ _ _ _ _ → GO TO WTRHOME

CELLFOR. (CATI) Cell Phone - Foreign Number
(What is the area code and phone number?)
• Ctrl-D and Ctrl-R not allowed; For DK/RF, GO BACK and ENTER [5] at previous question
WTRHOME. (CATI) Does [RPAY4B.NAMF] [RPAY4B.NAML] have a home phone?
- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER [5]

1. Yes 5. No → GO TO RPAY5A

HOMEPH. (CATI) Home Phone - Area Code and Telephone Number
What is the area code and phone number?
- If foreign phone, PRESS [ENTER] to go to foreign phone field
- Ctrl-D and Ctrl-R not allowed; For DK/RF, GO BACK and ENTER [5] at previous question
- Please enter this phone number starting with the area code. Do not include a long distance code/prefix 1.

[ENTER] (___)(___)___-___ → GO TO RPAY5A

HOMEOF. (CATI) Home Phone - Foreign Number
(What is the area code and phone number?)
- Ctrl-D and Ctrl-R not allowed; For DK/RF, GO BACK and ENTER [5] at previous question

GO TO RPAY5A

End OPPHONE

RPAY4B Web Grid (RPAY4B block, OPPHONE block). (WEB) Please enter the name and contact information for the person to whom you would like us to send the payment. When you’re finished, please click “Next” to save your information and continue.

Title
First name
Middle name
Last name
Suffix
Country
United States includes Puerto Rico, U.S. Virgin Islands, Guam, American Samoa and the Northern Mariana Islands
In Care Of
“In Care Of” is used for mail to be delivered to someone at another person’s address and usually contains the name of the person to whom the address belongs.
Address Line 1
Apartment or Suite
Enter “Apt” or “Ste” plus numbers or letters
Address Line 2
“Address Line 2” is most often used for a room or floor number.
City
State
[Zip / Postal] Code
Cell Phone Number
(Assign WTRCELL=Yes if RESPONSE)
Please enter this phone number starting with the area code. Do not include a long distance code/prefix 1.

Home Phone Number

Please enter this phone number starting with the area code. Do not include a long distance code/prefix 1.

Contact Person 1

RPAYSA. (CATI) \([R=RP, \ SP, \ OFUM]\): 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 \([REFERENCE PERSON]\) 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
- ENTER [7] if R refuses Contact Person information
- Ctrl-D and Ctrl-R not allowed

1. Continue 7. Prefer not to provide this information

GO TO RPAY5CKPT (CLEAR OUT PRELISTED CP1/CP2 INFO)
GO TO TY RULE

(WEB) \([R=RP, \ SP, \ OFUM]\): We will contact you again next year and you will receive a token of our appreciation for that interview, too. Just in case you should move before then and we don’t receive your address update postcard, we would like the name of someone, such as a close friend or relative not living with you, who will know where we can reach you. / \([R=PROXY]\): Just in case \([REFERENCE PERSON]\) should move and we don’t receive [his / her] address update postcard, we would like the name of someone who could help us locate [him / her].]

This should be someone, such as a close friend or relative NOT LIVING WITH \([R=RP, \ SP, \ OFUM]\): you / \([R=PROXY]\): \([REFERENCE PERSON]\), who will know where we can reach \([R=RP, \ SP, \ OFUM]: you / \[R=PROXY]: [REFERENCE PERSON]\].

1. Continue 7. Prefer not to provide this information

GO TO RPAY5CKPT (CLEAR OUT PRELISTED CP1/CP2 INFO)
GO TO TY RULE

RPAY5CKPT. CAI Checkpoint: Whether Contact Person 1 Information Preloaded

1. Contact Person 1 Preloaded 5. Contact Person 1 Not Preloaded → GO TO RPAY5D Block

RPAYSC. (CATI) Last time, we had \([PRELOADED CONTACT PERSON 1]\) listed as a contact for \([R=RP, \ SP, \ OFUM]: you / \[R=PROXY]: [REFERENCE PERSON]\]. Would you like to continue with this contact?

- Ctrl-D and Ctrl-R not allowed
- ENTER [7] if R refuses Contact Person information

\([R=RP, \ SP, \ OFUM]\): 1. Yes, continue with this contact

\([R=PROXY]\): 2. Yes, & CP is not Proxy

GO TO RPAY5D1

\([R=PROXY]\): 3. Yes, & CP is Proxy

(Assign ADDRTYPE=4 & assign RPAY5D Block/C1PHONE Block/RPAYS5- RPAY5/CP1/CP2/RPAY5=PROXY INFO)

GO TO RPAY5D Block

5. No, change this contact

7. R refused contact info

GO TO RPAY5D Block

GO TO RPAY6CKPT

(WEB) Last time, \([PRELOADED CONTACT PERSON 1]\) was listed as a contact person for \([R=RP, \ SP, \ OFUM]: you / \[R=PROXY]: [REFERENCE PERSON]\]. Would you like to continue to list this person as a contact?

1. Yes, continue to list this person as a contact

5. No, replace this person with a different contact

7. No, prefer not to provide this information any longer

NA
GO TO RPAYSD Web Grid

RPAY5D1. (CAT1 ONLY) Is the address I have for [PRELOADED CONTACT PERSON 1] correct?
- READ Contact Person 1 address to R
- 1. Yes, address is correct → (Assign ADDRTYPE=4 & assign RPAYSD Block=CP1 INFO) GO TO C1PHONE Block
- 5. No, address needs updating GO TO RPAY5D Block

ADDRPAYMENT.RPAYSD Prefilled with ContactPerson1 preload
ADDRTYPE. Which address. Assigned.
- 4. Contact Person 1

TITLE, NAMF, NAMM, NAML, SUFFIX, CNTRYCODE (COUNTRY), INCO, ADDR1, APTSTE, ADDR2, CITY, STCODE (STATE), ZIP. (CAT1) Title -- e.g. "Mr", "Mrs", "Ms", "Miss", "Dr"
- RPAY5C=1, 2: Does (he/she) still live at this address? / RPAY5C=5 or RPAY5CKPT=5: Who shall I list as a contact person for [R=RP, SP, OFUM: you / R=PROXY: [REFERENCE PERSON]]? What is (his/her) complete name and mailing address?
- If needed, REMIND R: This should be someone, such as a close friend or relative not living with [R=RP, SP, OFUM: you / R=PROXY: [REFERENCE PERSON]], who will know where we can reach [you / (him / her)]
- If no title, PRESS [Enter] to continue
- Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue
- [Contact Person 1 Preloaded (RPAY5CKPT=1): IF R refuses Contact Person info, DO NOT ENTER anything here. GO BACK and ENTER [7] at RPay5C to exit these questions]

String 6
First Name
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 20
Middle Name
- Ask for Middle Name but do not probe DK or RF
- If none, PRESS [Enter] to continue
- Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 20
Last Name
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 20
Suffix -- e.g. "Sr", "Jr"
- If none, PRESS [Enter] to continue
- Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 20
Country
- ENTER [185 UNITED STATES] for Puerto Rico, U.S. Virgin Islands, Guam, American Samoa or the Northern Mariana Islands
- Select 1 – 193 (Defaults to 185/US)

In Care Of
Is there an “in care of” for this address?
- If none, PRESS [Enter] to continue
- Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 40

Address 1
- IF R says the mailing address contains both a street address and PO Box: ENTER street address here (Address 1) and ENTER PO Box in Address 2
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 40

CHECK for DK, RF, or DON’T KNOW entered: A valid address is required in order for us to make a payment, including name, address line 1, city, state, sip/postal code and country. This payment will not be made until this information is provided.

Apt/Suite
- If none, PRESS [Enter] to continue
- ENTER [Apt] or [Ste] plus numbers and /or letters
- Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 10

Address 2
- IF R says the mailing address contains both a street address and PO Box: ENTER PO Box here (Address 2)
- If none, PRESS [Enter] to continue
- Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 40

City
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 40

CHECK for DK, RF, or DON’T KNOW entered: A valid address is required in order for us to make a payment, including name, address line 1, city, state, sip/postal code and country. This payment will not be made until this information is provided.

State (For COUNTRY=185)
Select 1 - 57 (Assigned 57/FC if Country<>185)

Zip Code
- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER all [0]'s

String 10

End RPAY5D

ADDRPAYMENT.C1PHONE Prefilled with ContactPerson1 preload

ADDRTYPE. Which phone. Assigned.
  4. Contact Person 1

WTRCELL. (CATI) Does [RPAY5D,NAMF] [RPAY5D,NAML] have a cell phone?
- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER [5]
  1. Yes 5. No → GO TO WTRHOME

CELLPH. (CATI) Cell Phone - Area Code and Telephone Number
What is the area code and phone number?
- ASK; or CONFIRM if phone number has been prelisted and this is the same Contact Person as [P2YEAR]
- If foreign phone, PRESS [ENTER] to go to foreign phone field
- Ctrl-D and Ctrl-R not allowed; For DK/RF, GO BACK and ENTER [5] at previous question
- Please enter this phone number starting with the area code. Do not include a long distance code/prefix 1.
CELLFOR. *(CATI)* Cell Phone - Foreign Number  
(What is the area code and phone number?)
- ASK; or CONFIRM if phone number has been prelisted and this is the same Contact Person as [P2YEAR]
- Ctrl-D and Ctrl-R not allowed; For DK/RF, GO BACK and ENTER [5] at previous question

WTRHOME. *(CATI)* Does [RPAY5D.NAMF] [RPAY5D.NAML] have a home phone?
- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER [5]

HOMEPH. *(CATI)* Home Phone - Area Code and Telephone Number  
What is the area code and phone number?
- ASK; or CONFIRM if phone number has been prelisted and this is the same Contact Person as [P2YEAR]
- If foreign phone, PRESS [ENTER] to go to foreign phone field
- Ctrl-D and Ctrl-R not allowed; For DK/RF, GO BACK and ENTER [5] at previous question
- Please enter this phone number starting with the area code. Do not include a long distance code/prefix 1.

HOMEFOR. *(CATI)* Home Phone - Foreign Number  
(What is the area code and phone number?)
- ASK; or CONFIRM if phone number has been prelisted and this is the same Contact Person as [P2YEAR]
- Ctrl-D and Ctrl-R not allowed; For DK/RF, GO BACK and ENTER [5] at previous question

End C1PHONE
RPAY5M. *(CATI)* Is there another email address where we can contact [RPAY5D.NAMF] [RPAY5D.NAML]?

1. Yes 5. No → GO TO RPAY5JJ

RPAY5N. *(CATI)* (What is that e-mail address?)
- ASK; or CONFIRM if email address has been prelisted and this is the same Contact Person as [P2YEAR]
- ENTER email address, then READ BACK and VERIFY with Respondent
- Ctrl-D and Ctrl-R not allowed; For DK/RF go back and ENTER [Ctrl-D, Ctrl-R] at previous question

GO TO RPAY5JJ

RPAY5D Web Grid (RPAY5D block, C1PHONE block, RPAY5K-RPAY5N). *(WEB)* [RPAY5C=1: Please review the information below and make any changes needed. / RPAY5C=5 or RPAY5CKPT=5: Please enter the name and contact information for the person you would like to list as a contact.] When you’re finished, please click “Next” to save your information and continue.

This should be someone, such as a close friend or relative NOT LIVING WITH [R=RP, SP, OFUM: you / R=PROXY: [REFERENCE PERSON]], who will know where we can reach [R=RP, SP, OFUM: you / R=PROXY: [REFERENCE PERSON]].

Title
First name
Middle name
Last name
Suffix
Country

United States includes Puerto Rico, U.S. Virgin Islands, Guam, American Samoa and the Northern Mariana Islands

In Care Of
“In Care Of” is used for mail to be delivered to someone at another person’s address and usually contains the name of the person to whom the address belongs.

Address Line 1
Apartment or Suite
Enter “Apt” or “Ste” plus numbers or letters
Address Line 2
“Address Line 2” is most often used for a room or floor number.

City
State
[Zip / Postal] Code

Cell Phone Number
Please enter this phone number starting with the area code. Do not include a long distance code/prefix 1.

Home Phone Number
Please enter this phone number starting with the area code. Do not include a long distance code/prefix 1.
### RPAY5JJ. (CATI) What is (his / her) relationship to [R=RP, SP, OFUM: you / R=PROXY: [REFERENCE PERSON]]?

<p>| | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
</table>

### (WEB) What is [RPAY5D.NAMF] [RPAY5D.NAML]'s relationship to [R=RP, SP, OFUM: you / R=PROXY: [REFERENCE PERSON]]?

<p>| | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
</table>

---

### Contact Person 2

#### RPAY6CKPT. CAI Checkpoint: Whether Contact Person 2 Information Preloaded

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Contact Person 2 Preloaded</td>
<td>Contact Person 2 Not Preloaded</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>5. RPAY5A=Continue &amp; RPAY5C&lt;&gt;Refused (RPAY5A=1 &amp; RPAY5C&lt;&gt;7)</td>
<td>7. RPAY5A=Continue &amp; RPAY5C=Refused; or RPAY5C&lt;&gt;Yes (RPAY5A=1 &amp; RPAY5C=7; or RPAY5A&lt;&gt;1)</td>
</tr>
</tbody>
</table>

- GO TO RPAY6C
- GO TO RPAY6D
- GO TO RPAY6D1
- GO TO TY1 RULE

---

### RPAY6B. (CATI) Last time, we also had [PRELOADED CONTACT PERSON 2] listed as a contact for [R=RP, SP, OFUM: you / R=PROXY: [REFERENCE PERSON]]. Would you like to continue with this contact?

- Ctrl-D AND Ctrl-R not allowed
- ENTER [7] if R refuses Contact Person information

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>R=RP, SP, OFUM: 1. Yes, continue with this contact</td>
<td>R=PROXY: 3. Yes, &amp; CP is Proxy (Assign ADDRTYPE=5 &amp; assign RPAY6D Block/CPHONE Block/RPAY6K-RPAY6G/RPAY6J=PROXY INFO)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GO TO RPAY6D1</td>
<td>GO TO RPAY6D Block</td>
<td>GO TO TY1 RULE</td>
</tr>
</tbody>
</table>

### (WEB) Last time, [PRELOADED CONTACT PERSON 2] was also listed as a contact person for [R=RP, SP, OFUM: you / R=PROXY: [REFERENCE PERSON]]. Would you like to continue to list this person as a contact?

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Yes, continue to list this person as a contact</td>
<td>5. No, replace this person with a different contact</td>
<td>7. No, prefer not to provide this information any longer</td>
</tr>
</tbody>
</table>

- (CLEAR OUT PRELISTED CP2 INFO) GO TO TY1 RULE
RPAY6C.  (CATI) We would also like to have the name of a second contact person, someone who will know where we can reach [R=RP, SP, OFUM: you / R=PROXY: [REFERENCE PERSON]] if the first contact is not able to help us. Is there another contact person who can help use reach [R=RP, SP, OFUM: you / R=PROXY: [REFERENCE PERSON]]?  
- If needed, REMIND R: This should be someone, such as a close friend or relative not living with [R=RP, SP, OFUM: you / R=PROXY: [REFERENCE PERSON]], who will know where we can reach [you / (him / her)]

[1. Yes] → GO TO RPAY6D Block  [5. No] → GO TO TY1 RULE

(WEB) If [RPAY6D.NAMF] [RPAY6D.NAML] is not able to help us, is there a second person who can help us reach [R=RP, SP, OFUM: you / R=PROXY: [REFERENCE PERSON]]? This should be someone, such as a close friend or relative NOT LIVING WITH [R=RP, SP, OFUM: you / R=PROXY: [REFERENCE PERSON]], who will know where we can reach [R=RP, SP, OFUM: you / R=PROXY: [REFERENCE PERSON]].

[1. Yes] → GO TO RPAY6D Web Grid  [5. No]  7. Prefer not to provide this information  [NA] → GO TO TY1 RULE

RPAY6D.  (CATI ONLY) Is the address I have for [PRELOADED CONTACT PERSON 2] correct?  
- READ Contact Person 2 address to R

[1. Yes, address is correct] → (Assign ADDRTYPE=5 & assign RPAY6D Block=CP2 INFO)  [5. No, address needs updating] → GO TO C2PHONE Block

ADDRPAYMENT.RPAY6D Prefilled with ContactPerson2 preload

ADDRTYPE. Which address. Assigned.

[5. Contact Person 2]

TITLE, NAMF, NAMM, NAML, SUFFIX, COUNTRYCODE (COUNTRY), INCO, ADDR1, APTSTE, ADDR2, CITY, STCODE (STATE), ZIP.  (CATI) Title -- e.g. “Mr”, “Mrs”, “Ms”, “Miss”, “Dr” [RPAY6B=1, 2: Does (he/she) still live at this address? / RPAY6B=5 or RPAY6CKPT=5: Who shall I list as a contact person for [R=RP, SP, OFUM: you / R=PROXY: [REFERENCE PERSON]]? What is (his/her) complete name and mailing address?]

- If needed, REMIND R: This should be someone, such as a close friend or relative not living with [R=RP, SP, OFUM: you / R=PROXY: [REFERENCE PERSON]], who will know where we can reach [you / (him / her)]

- If no title, PRESS [Enter] to continue

- Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

- [Contact Person 2 Preloaded (RPAY6CKPT=1): IF R refuses Contact Person info, DO NOT ENTER anything here. GO BACK and ENTER [7] at RPay6B to exit these questions]

- [Contact Person 2 Not Preloaded (RPAY6CKPT=5): IF R refuses Contact Person info, DO NOT ENTER anything here. GO BACK and ENTER [5] at RPay6C to exit these questions]

String 6

First Name

- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 20  

CHECK for DK, RF, or DON'T KNOW entered: A valid address is required in order for us to make a payment, including name, address line 1, city, state, sip/postal code and country. This payment will not be made until this information is provided.

Middle Name

- Ask for Middle Name but do not probe DK or RF

- If none, PRESS [Enter] to continue

- Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 20
Last Name
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 20 CHECK for DK, RF, or DON'T KNOW entered: A valid address is required in order for us to make a payment, including name, address line 1, city, state, zip/postal code and country. This payment will not be made until this information is provided.

Suffix -- e.g. "Sr", "Jr"
- If none, PRESS [Enter] to continue
- Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 20

Country
- ENTER [185 UNITED STATES] for Puerto Rico, U.S. Virgin Islands, Guam, American Samoa or the Northern Mariana Islands

Select 1 – 193 (Defaults to 185/US)

In Care Of
Is there an “in care of” for this address?
- If none, PRESS [Enter] to continue
- Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 40

Address 1
- IF R says the mailing address contains both a street address and PO Box: ENTER street address here (Address 1) and ENTER PO Box in Address 2
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 40 CHECK for DK, RF, or DON’T KNOW entered: A valid address is required in order for us to make a payment, including name, address line 1, city, state, zip/postal code and country. This payment will not be made until this information is provided.

Apt/Suite
- If none, PRESS [Enter] to continue
- ENTER [Apt] or [Ste] plus numbers and /or letters
- Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 10

Address 2
- IF R says the mailing address contains both a street address and PO Box: ENTER PO Box here (Address 2)
- If none, PRESS [Enter] to continue
- Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 40

City
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 40 CHECK for DK, RF, or DON’T KNOW entered: A valid address is required in order for us to make a payment, including name, address line 1, city, state, zip/postal code and country. This payment will not be made until this information is provided.

State (For COUNTRY=185)

Select 1 – 57 (Assigned 57/FC if Country<>185)

Zip Code
- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER all [0]'s

String 10

End RPAY6D

ADDRPAYMENT.C2PHONE Prefilled with ContactPerson2 preload
ADDRTYPE. Which phone. Assigned.

5. Contact Person 2

WTRCELL. (CATI) Does [RPAY6D.NAMF] [RPAY6D.NAML] have a cell phone?

- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER [5]

1. Yes 5. No → GO TO WTRHOME

CELLPH. (CATI) Cell Phone - Area Code and Telephone Number

What is the area code and phone number?

- ASK; or CONFIRM if phone number has been prelisted and this is the same Contact Person as [P2YEAR]
- If foreign phone, PRESS [ENTER] to go to foreign phone field
- Ctrl-D and Ctrl-R not allowed; For DK/RF, GO BACK and ENTER [5] at previous question
- Please enter this phone number starting with the area code. Do not include a long distance code/prefix 1.

[ENTER] (_ _ _) _ - _ _ _ _ → GO TO WTRHOME

CELLFOR. (CATI) Cell Phone - Foreign Number

(What is the area code and phone number?)

- ASK; or CONFIRM if phone number has been prelisted and this is the same Contact Person as [P2YEAR]
- Ctrl-D and Ctrl-R not allowed; For DK/RF, GO BACK and ENTER [5] at previous question

String 20

WTRHOME. (CATI) Does [RPAY6D.NAMF] [RPAY6D.NAML] have a home phone?

- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER [5]

1. Yes 5. No → GO TO RPAY6K

HOMEPH. (CATI) Home Phone - Area Code and Telephone Number

What is the area code and phone number?

- ASK; or CONFIRM if phone number has been prelisted and this is the same Contact Person as [P2YEAR]
- If foreign phone, PRESS [ENTER] to go to foreign phone field
- Ctrl-D and Ctrl-R not allowed; For DK/RF, GO BACK and ENTER [5] at previous question
- Please enter this phone number starting with the area code. Do not include a long distance code/prefix 1.

[ENTER] (_ _ _) _ - _ _ _ _ → GO TO RPAY6K

HOMEFOR. (CATI) Home Phone - Foreign Number

(What is the area code and phone number?)

- ASK; or CONFIRM if phone number has been prelisted and this is the same Contact Person as [P2YEAR]
- Ctrl-D and Ctrl-R not allowed; For DK/RF, GO BACK and ENTER [5] at previous question

String 20

END C2PHONE
RPAY6K. *(CATI)* Is there an email address where we can contact [RPAY6D.NAMF] [RPAY6D.NAML]?

1. Yes 5. No → GO TO RPAY6JJ

↓

RPAY6L. *(CATI)* (What is that e-mail address?)

- **ASK; or CONFIRM if email address has been prelisted and this is the same Contact Person as [P2YEAR]**
- **ENTER email address, then READ BACK and VERIFY with Respondent**
- **Ctrl-D and Ctrl-R not allowed; For DK/RF go back and ENTER [Ctrl-D, Ctrl-R] at previous question**

String 50

GO TO RPAY6JJ

RPAY6M. *(CATI)* Is there another email address where we can contact [RPAY6D.NAMF] [RPAY6D.NAML]?

1. Yes 5. No → GO TO RPAY6JJ

↓

RPAY6N. *(CATI)* (What is that e-mail address?)

- **ASK; or CONFIRM if email address has been prelisted and this is the same Contact Person as [P2YEAR]**
- **ENTER email address, then READ BACK and VERIFY with Respondent**
- **Ctrl-D and Ctrl-R not allowed; For DK/RF go back and ENTER [Ctrl-D, Ctrl-R] at previous question**

String 50

GO TO RPAY6JJ

RPAY6D Web Grid (RPAY6D block, C2PHONE block, RPAY6K-RPAY6N). *(WEB)* [RPAY6B=1: Please review the information below and make any changes needed. / RPAY6B=5 or RPAY6BCKPT=5: Please enter the name and contact information for the person you would like to list as a contact.] When you’re finished, please click “Next” to save your information and continue.

*This should be someone, such as a close friend or relative NOT LIVING WITH [R=RP, SP, OFUM: you / R=PROXY: [REFERENCE PERSON]], who will know where we can reach [R=RP, SP, OFUM: you / R=PROXY: [REFERENCE PERSON]].*

<table>
<thead>
<tr>
<th>Field</th>
<th>Length</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>String 6</td>
</tr>
<tr>
<td>First name</td>
<td>String 20</td>
</tr>
<tr>
<td>Middle name</td>
<td>String 20</td>
</tr>
<tr>
<td>Last name</td>
<td>String 20</td>
</tr>
<tr>
<td>Suffix</td>
<td>String 20</td>
</tr>
<tr>
<td>Country</td>
<td>Select 1 – 193 (Defaults to 185/US)</td>
</tr>
<tr>
<td>In Care Of</td>
<td>String 40</td>
</tr>
<tr>
<td>Address Line 1</td>
<td>String 40</td>
</tr>
<tr>
<td>Apartment or Suite</td>
<td>String 10</td>
</tr>
</tbody>
</table>

“In Care Of” is used for mail to be delivered to someone at another person’s address and usually contains the name of the person to whom the address belongs.
“Address Line 2” is most often used for a room or floor number.

City
State
[Zip / Postal] Code
Cell Phone Number

Please enter this phone number starting with the area code. Do not include a long distance code/prefix 1.
Home Phone Number
Please enter this phone number starting with the area code. Do not include a long distance code/prefix 1.
Email
2nd Email

RPAY6JJ. (CATI) What is (his / her) relationship to [R=RP, SP, OFUM: you / R=PROXY: [REFERENCE PERSON]]?

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 (RPAY6JJSPEC: Specify. (String 50))

(WEB) What is [RPAY6D.NAMF] [RPAY6D.NAML]’s relationship to [R=RP, SP, OFUM: you / R=PROXY: [REFERENCE PERSON]]?

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-Please Specify: (RPAY6JJSPEC)

TAS FU Members

ADDRPAYMENT.TY[1..24] [1..24]=AQSNOF FU Member

TYAQSNOF TAS FU Member. Assigned.

1 – 24

TY1 RULE: Whether TAS Eligible Individuals Age 17 or Older in FU

TAS Eligible Individuals Age 17+
(PYPERINFO.TYELIG=1 & AGEIWDATE=17+)

TAS Eligible Individuals Age <17; or No TAS Eligible Individuals
(PYPERINFO.TYELIG=1 & AGEIWDATE<17)

GO TO [CATI: RPAY7A / WEB: RPAY9ACKPT]

TY1. (CATI) TAS Eligible Person: [CYNAMF] [CYNAML] [CYAQRTH]

[R=TAS FU MEMBER: You / ALL OTHERS: [CYNAMF] [CYNAML]] [AGEIWDATE=17: may [LOOP 2+: also] be / AGEIWDATE>17: [are / is] [LOOP 2+: also]] eligible to participate in the F.E.S. (Family Economics Study) Transition into Adulthood Study (T.A.S.) we will be doing in the near future. Will we be able to reach [you / him / her] at [CYFUHU=FU, FUMI: [your / his / her] current address / CYFUHU=MO, MIL, EDUC: [his / her] address that you gave me earlier]?

1. Yes  → GO TO PHONECKPT  5. No

GO TO TY2
(WEB) [R=TAS FU MEMBER: You / ALL OTHERS: [CYNAMF] [CYNAML]] [AGEIWDATE=17: may [LOOP 2+: also] be / AGEIWDATE>17: [are / is] [LOOP 2+: also] eligible to participate in the F.E.S. (Family Economics Study) Transition into Adulthood Study (T.A.S.) we will be doing in the near future. Will we be able to reach [you / him / her] at [CYFUHU=FU, FUMI: [your / his / her] current address / CYFUHU=MO, MIL, EDUC: [his / her] address that you reported earlier]?

1. Yes  → GO TO PHONECKPT
5. No  → GO TO TY2

TY2. (CATI) TAS Eligible Person: [CYNAMF] [CYNAML] [CYAQRTH]
Do you know what [your / his / her] new address will be?

1. Yes  → GO TO PHONECKPT
5. No  → GO TO PHONECKPT

(COUNTRY) (CTRYNAME), ADDR1, ADDR2, CITY, STATE (STATEABBREV), ZIP.

(CATI) TAS Eligible Person: [CYNAMF] [CYNAML] [CYAQRTH]

Country
- ENTER [185 UNITED STATES] for Puerto Rico, U.S. Virgin Islands, Guam, American Samoa or the Northern Mariana Islands

Select 1 – 193 (Defaults to 185/US)

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]

String 40 CHECK for DK, RF, or DON'T KNOW entered: A valid address is required in order for us to make a payment, including name, address line 1, city, state, sip/postal code and country. This payment will not be made until this information is provided.

Address 2
- Enter P.O. Box here
- If none, PRESS [Enter] to continue
- Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 40

City
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 40 CHECK for DK, RF, or DON'T KNOW entered: A valid address is required in order for us to make a payment, including name, address line 1, city, state, sip/postal code and country. This payment will not be made until this information is provided.

State (For COUNTRY=185)

Select 1 – 57 (Assigned 57/FC if Country<>185)

Zip Code
- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER all [0]'s

String 10

(WEB) Please enter the address where we will be able to reach [you / [CYNAMF] [CYNAML]]. When you’re finished, please click “Next” to save your updates and continue.

Country
Select 1 – 193 (Defaults to 185/US)
United States includes Puerto Rico, U.S. Virgin Islands, Guam, American Samoa and the Northern Mariana Islands

Address Line 1
Address Line 2

“Address Line 2” is most often used for a room or floor number.

City
State Select

[Zip / Postal] Code String 10

PHONECKPT. CAI Checkpoint: Whether Cell Phone Already Collected for this TAS FU Member

1. R is This TAS FU Member
2. RP or SP is this TAS FU Member
(TAS is SP & R=RP; or TAS is RP & R=SP, OFUM, Proxy)
5. All Others

GO TO EMAILCKPT

WTRCELL. (CATI) TAS Eligible Person: [CYNAMF] [CYNAML] [CYAQRTH]

[Do you / Does [CYNAMF] [CYNAML]] have a cell phone?

- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER [5]

1. Yes 5. No → GO TO EMAILCKPT

GO TO CELLPH

(WEB) [Do you / Does [CYNAMF] [CYNAML]] have a CELL phone?

1. Yes 5. No → GO TO EMAILCKPT

GO TO CELLTYPE

CELLTYPE_W. (WEB ONLY) Is that a U.S. or a non-U.S. cell phone number?

1. U.S. number 2. Foreign number NA → GO TO EMAILCKPT

GO TO CELLPH  GO TO CELLFOR
CELLPH. *(CATI)* Cell Phone for TAS Eligible Person: [CYNAMF] [CYNAML] [CYAQRTH]

What is the area code and phone number?
- If foreign phone, PRESS [ENTER] to go to foreign phone field
- Ctrl-D and Ctrl-R not allowed; For DK/RF, GO BACK and ENTER [5] at previous question
- Please enter this phone number starting with the area code. Do not include a long distance code/prefix 1.

[ENTER] (___)___-___

GO TO EMAILCKPT

WEB What is the area code and phone number?
Please enter this phone number starting with the area code. Do not include a long distance code/prefix 1.

(____)___-___

GO TO EMAILCKPT

CELLFOR. *(CATI)* Cell Phone for TAS Eligible Person: [CYNAMF] [CYNAML] [CYAQRTH]

(What is the area code and phone number?)
- Ctrl-D and Ctrl-R not allowed; For DK/RF, GO BACK and ENTER [5] at previous question

String 20

WEB What is the phone number?

String 20

EMAILCKPT. CAI Checkpoint: Whether Email Address Already Collected for this TAS FU Member

<table>
<thead>
<tr>
<th>1. R is This TAS FU Member</th>
<th>2. RP or SP is this TAS FU Member</th>
<th>5. All Others</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>(TAS is SP &amp; R=RP; or TAS is RP &amp; R=SP, OFUM, Proxy)</em></td>
<td>*</td>
<td></td>
</tr>
</tbody>
</table>

GO TO TY END RULE

TYEMAIL. *(CATI)* TAS Eligible Person: [CYNAMF] [CYNAML] [CYAQRTH]

Is there an email address where we will be able to contact [you / [CYNAMF] [CYNAML]]?

1. Yes          5. No

GO TO TY END RULE

TYEMAILADDR. *(CATI)* TAS Eligible Person: [CYNAMF] [CYNAML] [CYAQRTH]

(What is that email address?)
- ENTER email address, then READ BACK and VERIFY with Respondent
- Ctrl-D and Ctrl-R not allowed; For DK/RF go back and ENTER [Ctrl-D, Ctrl-R] at previous question

String 50

TYEMAIL2. *(CATI)* TAS Eligible Person: [CYNAMF] [CYNAML] [CYAQRTH]

Is there another email address where we will be able to contact [you / [CYNAMF] [CYNAML]]?

1. Yes          5. No

GO TO TY END RULE

TYEMAIL2ADDR. *(CATI)* TAS Eligible Person: [CYNAMF] [CYNAML] [CYAQRTH]

(What is that email address?)
- ENTER email address, then READ BACK and VERIFY with Respondent
• Ctrl-D and Ctrl-R not allowed; For DK/RF go back and ENTER [Ctrl-D, Ctrl-R] at previous question

String 50

GO TO TY END RULE

TYEMAIL – TYEMAIL2ADDR. (WEB) Please enter an email address where we can contact you / [CYNAMF] [CYNAML]. When you’re finished, please click “Next” to save your information and continue.

Email String 50 (Assign TYEMAIL=Yes if RESPONSE)

2nd Email String 50 (Assign TYEMAIL2=Yes if RESPONSE)

TY END RULE: Whether More Eligible TAS FU Members in FU

More TAS FU Members → REPEAT TY1 – TYEMAIL2ADDR; Max=24; Then GO TO [CATI: RPAY7A / WEB: RPAY9ACKPT]

No More TAS FU Members

GO TO [CATI: RPAY7A / WEB: RPAY9ACKPT]

End TY

RPAY7A. (CATI ONLY) Interviewer Checkpoint

• Are there others in this 68-ID whose address and phone number need updating?

1. Yes 5. No → GO TO RPAY7C

RPAY7B. (CATI ONLY) We would like to update our address and phone number information for other members of [your / [REFERENCE PERSON]’s] 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 MSMS later

1. Yes 5. No

NOTE for CATI Interviews: If Cell Phone Payment information has already been entered into MSMS, the value ‘1’ is pulled into RPAY7C.

RPAY7C. (CATI ONLY) Interviewer Checkpoint

• Did Respondent use a cell phone to complete this interview?

1. Yes 5. No → GO TO RPAY9ACKPT

SIGNAL for RPAY7C=YES: IWER: You entered that R completed this interview using a cell phone. If this is true, click Suppress to confirm. If R did not use a cell phone to complete this interview, click Close and change your response to No.

RPAY7D. (CATI ONLY) Interviewer Checkpoint

• Was a cell phone payment offered by you or anyone else?

1. Yes 5. No
**Payment**

**RPAY9ACKPT. CAI Checkpoint: Whether Payment Accepted or Declined**

<table>
<thead>
<tr>
<th>Not Prepaid (WTRPREPAID=5)</th>
<th>Prepaid (WTRPREPAID=1)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. Accepted</strong> (RPAY4A=1, 2, 3)</td>
<td><strong>4. Not OK: Accepted</strong> (RPAY4PP=2, 5 &amp; RPAY4A=1, 2, 3)</td>
</tr>
<tr>
<td>CATI → GO TO RPAY9A</td>
<td>CATI → GO TO RPAY8</td>
</tr>
<tr>
<td><strong>WEB-Epay Allowed</strong> (XEPDISPLAY=1)</td>
<td><strong>WEB-Epay Not Allowed</strong> (XEPDISPLAY=0)</td>
</tr>
<tr>
<td>WEB → GO TO WEB END PAGE</td>
<td>WEB → (Assign RPAY9A=1)</td>
</tr>
<tr>
<td><strong>WEB-Epay Allowed</strong> (XEPDISPLAY=1)</td>
<td><strong>WEB-Epay Not Allowed</strong> (XEPDISPLAY=0)</td>
</tr>
<tr>
<td><strong>WEB</strong> → GO TO WEB END PAGE</td>
<td><strong>WEB</strong> → (Assign RPAY9A=1)</td>
</tr>
</tbody>
</table>

**RPAY9A. (CATI)** **Interviewer Checkpoint**

**Payee Name and Address:**

[[PROXYADDR] / [RMAILADDR] / [RPAY4B]]

(((Coverscreen.RSelect<>97 and RPAY4a=1 and ((AddrPayment.RMailAddr.CNTRYCODE=185 & RPay3A=5) or (Addr.Payment.RPay3B.Country=185 & AddrPayment.RMailAddr.CNTRYCODE=185 & RPay3A=1))) OR (Coverscreen.RSelect=97 and AddrPayment.ProxyAddr.CNTRYCODE=185 and RPay4a=1) OR (Coverscreen.RSelect=97 and RPAY4a=2 ((AddrPayment.RMailAddr.CNTRYCODE=185 & RPay3A=5) or (Addr.Payment.RPay3B.Country=185 & AddrPayment.RMailAddr.CNTRYCODE=185 & RPay3A=1))) OR (RPay4a=3 and AddrPayment.RPay4b.CNTRYCODE=185)) & EPAY ALLOWED (XEPDISPLAY=1): We can provide payment by either check or direct deposit to an account by electronic payment. We have contracted with JP Morgan Chase Bank to process electronic payments. If you choose electronic payment, we will provide [RPAY4A=1: your / RPAY4A=2: [REFERENCE PERSON]’s / RPAY4A=3: [OTHER PAYEE]’s] contact information to JP Morgan Chase Bank, who will then contact [RPAY4A=1: you / RPAY4A=2: [REFERENCE PERSON] / RPAY4A=3: [OTHER PAYEE]] directly about completing the payment. How would you like us to issue the payment?

**NOT PREPAID: Tell us the type of Respondent payment to make**

- The standard payment amount for this interview is $[PAYMENT]
- Non-standard payment amounts can be $[PAYMENT] to $[PAYMENT*2]

**ENTER [1, 7] or [2, 7]** (((Coverscreen.RSelect<>97 and RPAY4a=1 and (Addr.Payment.RPay3B.Country=185 & AddrPayment.RMailAddr.CNTRYCODE=185 & RPay3A=1))) OR (Coverscreen.RSelect=97 and AddrPayment.ProxyAddr.CNTRYCODE=185 and RPay4a=1) OR (Coverscreen.RSelect=97 and RPAY4a=2 ((AddrPayment.RMailAddr.CNTRYCODE=185 & RPay3A=5) or (Addr.Payment.RPay3B.Country=185 & AddrPayment.RMailAddr.CNTRYCODE=185 & RPay3A=1))) OR (RPAY4a=3 and AddrPayment.RPay4b.CNTRYCODE=185)) & EPAY ALLOWED (XEPDISPLAY=1): or [6, 7] to record a cell phone payment and/or temporary mailing address in addition to a standard check/money order

(((Coverscreen.RSelect<>97 and RPAY4a=1 and (AddrPayment.RMailAddr.CNTRYCODE=185 & RPay3A=5) or (Addr.Payment.RPay3B.Country=185 & AddrPayment.RMailAddr.CNTRYCODE=185 & RPay3A=1))) OR (Coverscreen.RSelect=97 and AddrPayment.ProxyAddr.CNTRYCODE=185 and RPay4a=1) OR (Coverscreen.RSelect=97 and RPAY4a=2 ((AddrPayment.RMailAddr.CNTRYCODE=185 & RPay3A=5) or (Addr.Payment.RPay3B.Country=185 & AddrPayment.RMailAddr.CNTRYCODE=185 & RPay3A=1))) OR (RPAY4a=3 and AddrPayment.RPay4b.CNTRYCODE=185))
Ctrl-D and Ctrl-R not allowed

**PREPAID:** IWER: This interview was PREPAID $[AMTPREPAID] but R reported the prepayment was not received or a different/additional payment is needed

- The standard payment amount for this interview is $[PAYMENT]
- Non-standard payment amounts can be $[PAYMENT] to $[PAYMENT*2]
- Other payment amounts (e.g., in addition to prepaid amount) can be $1.00 to $[PAYMENT*2]

ENTER [5] if a cash payment was made or ENTER [7] to request a check payment, [[[Coverscreen.RSelect<>97 and RPay4a=1 and ((AddrPayment.RMailAddr.CNTRYCODE=185 & RPay3A=5) or (Addr.Payment.RPay3B.Country=185 & AddrPayment.RMailAddr.CNTRYCODE=185 & RPay3A=1)) OR (Coverscreen.RSelect=97 and AddrPayment.ProxyAddr.CNTRYCODE=185 and RPay4a=1) OR (Coverscreen.RSelect=97 and RPay4a=2 ((AddrPayment.RMailAddr.CNTRYCODE=185 & RPay3A=5) or (Addr.Payment.RPay3B.Country=185 & AddrPayment.RMailAddr.CNTRYCODE=185 & RPay3A=1)) OR (RPay4a=3 and AddrPayment.RPay4b.CNTRYCODE=185)) & EPAY ALLOWED (XEPDISPLAY=1): electronic payment,] or special handling
  - Ctrl-D and Ctrl-R not allowed

| 1. Pay by CHECK in standard amount of $[PAYMENT] | For WTRPREPAID=5 only; Exclusive of 2, 5, 6 |
| 2. Pay by MONEY ORDER in standard amount of $[PAYMENT] | For WTRPREPAID=5 only; Exclusive of 1, 5, 6 |
| 6. Electronic payment in standard amount of $[PAYMENT] (U.S. addresses only) | Exclusive of 1, 2, 6, 7 |

SIGNAL for RPAY9A=EPAY: READ TO R: JP Morgan requires a U.S. bank or other financial institution for electronic payments - is your bank (or financial institution) a U.S. bank (financial institution)? If YES, select SUPPRESS to continue; if NO, change your selection to [1. Check] or [2. Money Order].

SIGNAL for RPAY9A=MO: 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.


(WEB) [Note: RPAY9A is asked of WEB respondents only if xEPDISPLAY=1 AND (Coverscreen.RSelect<>97 and RPay4a=1 and ((AddrPayment.RMailAddr.CNTRYCODE=185 & RPay3A=5) or (Addr.Payment.RPay3B.Country=185 & AddrPayment.RMailAddr.CNTRYCODE=185 & RPay3A=1)) OR (Coverscreen.RSelect=97 and RPay4a=2 and ((AddrPayment.RMailAddr.CNTRYCODE=185 & RPay3A=5) or (Addr.Payment.RPay3B.Country=185 & AddrPayment.RMailAddr.CNTRYCODE=185 & RPay3A=1)) OR (Coverscreen.RSelect=97 and AddrPayment.ProxyAddr.CNTRYCODE=185 and RPay4a=1) OR (RPay4a=3 and AddrPayment.RPay4b.CNTRYCODE=185)) & EPAY ALLOWED (XEPDISPLAY=1): electronic payment,] or special handling

5. CASH payment has been made (Record details)

| 5. CASH payment has been made (Record details) | Exclusive of 1, 2, 6, 7 |
| 7. Special handling: [NOT PREPAID: Non-standard payment / PREPAID: Payment] amount, cell phone payment, temporary address | For WTRPREPAID=5 & XEPDISPLAY=1 only; Exclusive of 1, 2, 5 |

WEB (Note: RPAY9A is asked of WEB respondents only if xEPDISPLAY=1 AND (Coverscreen.RSelect<>97 and RPay4a=1 and ((AddrPayment.RMailAddr.CNTRYCODE=185 & RPay3A=5) or (Addr.Payment.RPay3B.Country=185 & AddrPayment.RMailAddr.CNTRYCODE=185 & RPay3A=1)) OR (Coverscreen.RSelect=97 and RPay4a=2 and ((AddrPayment.RMailAddr.CNTRYCODE=185 & RPay3A=5) or (Addr.Payment.RPay3B.Country=185 & AddrPayment.RMailAddr.CNTRYCODE=185 & RPay3A=1)) OR (Coverscreen.RSelect=97 and AddrPayment.ProxyAddr.CNTRYCODE=185 and RPay4a=1) OR (RPay4a=3 and AddrPayment.RPay4b.CNTRYCODE=185)).
If xEPDISPLAY=0 OR \[(Coverscreen.RSelect<>97 and (AddrPayment.RMailAddr.CNTRYCODE<>185 or Addr.Payment.RPay3B.Country<>185 and RPay4a=1) OR (Coverscreen.RSelect=97 and AddrPayment.RMailAddr.CNTRYCODE<>185 or Addr.Payment.RPay4b.Country<>185 and RPay4a=3 and AddrPayment.RPay4b.CNTRYCODE<>185) & xEPDISPLAY=1)\]then RPAY9A is not asked and is assigned ‘1 automatically. Please see RPAY9ACKPT.

We can provide payment by either check or direct deposit to an account by electronic payment. We have contracted with JP Morgan Chase Bank to process electronic payments. If you choose electronic payment, we will provide [RPAY4A=1: your /
RPAY4A=2: [REFERENCE PERSON]’s /
RPAY4A=3: [OTHER PAYEE]’s contact information to JP Morgan Chase Bank, who will then contact [RPAY4A=1: you / RPAY4A=2: [REFERENCE PERSON] / RPAY4A=3: [OTHER PAYEE]] directly about completing the payment.

How would you like the University of Michigan to issue [RPAY4A=1: your / RPAY4A=2: [REFERENCE PERSON]’s / RPAY4A=3: [OTHER PAYEE]’s] payment?

Payee Name and Address:
[[PROXYADDR] / [RMAILADDR] / [RPAY4B]]

1. Check from the University of Michigan

6. Electronic payment through JP Morgan Chase Bank (U.S. addresses and banks only)

CHECK: You can only select one payment option.
CHECK for NA: Your response is required.

RPAY9B RULE: Type of Payment Selected

<table>
<thead>
<tr>
<th>Check or Money Order Only (RPAY9A=1, 2 only)</th>
<th>Cash (RPAY9A=5)</th>
<th>Electronic Payment Only (RPAY9A=6 only)</th>
<th>Special Handling (RPAY9A=1, 2, 6) &amp; 7)</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO TO [CATI: RPAY8 / WEB:WEB END PAGE]</td>
<td></td>
<td>GO TO RPAY9EP1 RULE</td>
<td>GO TO RPAY9D</td>
</tr>
</tbody>
</table>

Cash Payment

RPAY9B. (CATI ONLY) *CASH PAYMENT ONLY* Go back to RPAY9A for check, money order or electronic payment.

[PREPAID: IWER: This interview was PREPAID $[AMTPREPAID] but R reported the prepayment was not received or a different/additional payment is needed]

When did you make the [PREPAID: different /additional] cash payment?
• ENTER MM/DD/[CYEAR], with or without slashes
• Ctrl-D and Ctrl-R not allowed

_/_/ /_/ /[CYEAR]

RPAY9C. (CATI ONLY) *CASH PAYMENT ONLY* Go back to RPAY9A for check, money order or electronic payment.

DO NOT INCLUDE amount for cell phone payment here - record this separately at the next screen

[PREPAID: IWER: This interview was PREPAID $[AMTPREPAID] but R reported the prepayment was not received or a different/additional payment is needed]

How much was the cash Respondent payment for this interview?
• The standard payment amount for this interview is $[PAYMENT]
• Non-standard payment amounts can be $[PAYMENT] to $[PAYMENT*2]
• [PREPAID: Other payment amounts (e.g., in addition to prepaid amount) can be $1.00 to $[PAYMENT*2]]
• Ctrl-D and Ctrl-R not allowed
RPAY9C2. (CATI ONLY) *CASH PAYMENT ONLY* Go back to RPAY9A for check, money order or electronic payment.

How much, if any, was the cash Respondent payment for cell phone use?

- ENTER either $0.00 or $10.00
- Standard payment for cell phone use is $10.00
- Ctrl-D and Ctrl-R not allowed

$ 0.00; 10.00

SIGNAL for RPAY9C=0 & RPAY7D=YES: INTERVIEW WAS COMPLETED USING CELL PHONE and CELL PHONE PAYMENT HAS BEEN OFFERED. Cash payments: RECORD amount paid for cell phone use.

 GO TO RPAY8

Special Handling

RPAY9D. (CATI ONLY) *SPECIAL HANDLING*

Payee Name and Address:

[[PROXYADDR] / [RMAILADDR] / [RPAY4B]]

[PREPAID: IWER: This interview was PREPAID $[AMTPREPAID] but R reported the prepayment was not received or a different/additional payment is needed]

Please indicate the type(s) of [PREPAID: payment/] special handling needed.

- ENTER all that apply
- Ctrl-D and Ctrl-R not allowed

1. Non-standard IW payment–check

2. Temporary mailing address

3. Cell phone use payment, $10

4. Additional or new payment–check
5. Additional or new payment—electronic payment (U.S. addresses only)

7. Other-specify (RPAY9DSPEC. *SPECIAL HANDLING - Other specify* Please specify other special handling needed. But, go back to temporary address to record address where payment should be sent. (String 500))


RPAY9DAMT RULE: Type of Special Handling

<table>
<thead>
<tr>
<th>Non-Standard Payment Amount or Additional/ New Payment Needed (RPAY9D=1, 4, 5, 6)</th>
<th>All Others</th>
<th>→ GO TO RPAY9DADDR RULE</th>
</tr>
</thead>
</table>

Special Handling - Non-Standard Amount or Additional/New Payment

RPAY9DAMT. (CATI ONLY) *SPECIAL HANDLING - Non-standard payment amount*

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"

[PREPAID: IWER: This interview was PREPAID $[AMTPREPAID] but R reported the prepayment was not received or a different/additional payment is needed]

How much is the Respondent payment for this interview?

- The standard payment amount for this interview is $[PAYMENT]
- Non-standard payment amounts can be $[PAYMENT] to $[PAYMENT*2]
- [PREPAID: Other payment amounts (e.g., in addition to prepaid amount) can be $1.00 to $[PAYMENT*2]]
- Ctrl-D and Ctrl-R not allowed

NOT PREPAID: $[PAYMENT] – [PAYMENT*2]  
PREPAID: $1.00 – [PAYMENT*2]

RPAY9DADDR RULE: Whether Temporary Mailing Address Selected

<table>
<thead>
<tr>
<th>Temp Address (RPAY9D=2)</th>
<th>All Others</th>
<th>→ GO TO RPAY9EP1 RULE</th>
</tr>
</thead>
</table>

Special Handling - Temporary Mailing Address

ADDRPAYMENT.RPAY9DADDR

ADDRTYPE. Which address. Assigned.

8. Temporary Mailing

TITLE, NAMF, NAMM, NAML, SUFFIX, COUNTRY (CTRYNAME), ADDR1, APTSTE, ADDR2, CITY, STATE (STATEABBREV), ZIP. (CATI ONLY) *SPECIAL HANDLING - Temporary name and address*

Title -- e.g. “Mr”, “Mrs”, “Ms”, “Miss”, “Dr”

What is that name and address?

- If no title, PRESS [Enter] to continue
- Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 6
A valid address is required in order for us to make a payment, including name, address line 1, city, state, zip/postal code and country. This payment will not be made until this information is provided.

**First Name**
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

**Middle Name**
- Ask for Middle Name but do not probe DK or RF
- If none, PRESS [Enter] to continue
- Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

**Last Name**
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

**Suffix** — e.g. “Sr”, “Jr”
- If none, PRESS [Enter] to continue
- Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

**Country**
- ENTER [185 UNITED STATES] for Puerto Rico, U.S. Virgin Islands, Guam, American Samoa or the Northern Mariana Islands
- Select 1 – 193 (Defaults to 185/US)

**In Care Of**
- Is there an “in care of” for this address?
- If none, PRESS [Enter] to continue
- Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

**Address 1**
- IF R says the mailing address contains both a street address and PO Box: ENTER street address here (Address 1) and ENTER PO Box in Address 2
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

**Apt/Suite**
- If none, PRESS [Enter] to continue
- ENTER [Apt] or [Ste] plus numbers and /or letters
- Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

**Address 2**
- IF R says the mailing address contains both a street address and PO Box: ENTER PO Box here (Address 2)
- If none, PRESS [Enter] to continue
- Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

**City**
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]
CHECK for DK, RF, or DON'T KNOW entered: A valid address is required in order for us to make a payment, including name, address line 1, city, state, zip/postal code and country. This payment will not be made until this information is provided.

State (For COUNTRY=185)
Select 1 – 57 (Assigned 57/FC if Country<>185)

Zip Code
- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER all [0]'s

End RPA9DADDR

Electronic Payment

RPA9EP1 RULE: Whether Electronic Payment Selected

Electronic Payment (RPA9A=6 or RPA9D=5, 6) All Others → GO TO [CATI: RPA8 / WEB: WEB END PAGE]

RPA9EP1. (CATI) How would you prefer JP Morgan Chase Bank to contact [RPA4A=1: you / RPA4A=2: [REFERENCE PERSON] / RPA4A=3: [OTHER PAYEE]] in order to complete electronic payment, by email or text?
- Ctrl-D and Ctrl-R not allowed - we must have an email or cell phone to process electronic payments
- For DK/RF, GO BACK to RPA9A and select a different payment option

1. Email 2. Text

(WEB) How would you prefer JP Morgan Chase Bank to contact [RPA4A=1: you / RPA4A=2: [REFERENCE PERSON] / RPA4A=3: [OTHER PAYEE]] in order to complete electronic payment?

1. Email 2. Text

CHECK for NA: Your response is required.

RPA9EPCKPT. CAI Checkpoint: Whether Email or Cell Phone Already Collected

<table>
<thead>
<tr>
<th>EMAIL (RPA9EP1=1)</th>
<th>TEXT (RPA9EP1=2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Email collected (RPA4A=1 and ((R=PROXY &amp; RPAY1G=Yes) or (R=FUMEM &amp; RPAY2G=Yes))) ↓</td>
<td>3. Cell phone collected (RPA4A=1 and ((R=PROXY &amp; PROXYPH.WTRCELL=Yes) or (R=FUMEM &amp; RPAY2G=Yes))); or RPA4A=2 &amp; RPHONE.WTRCELL=Yes); or RPA4A=3 &amp; OPPHONE.WTRCELL=Yes)</td>
</tr>
<tr>
<td>2. Email not collected (RPA4A=1 and ((R=PROXY &amp; RPAY1G&lt;&gt;Yes) or (R=FUMEM &amp; RPAY2G&lt;&gt;Yes))); or RPA4A=2, 3)</td>
<td>4. Cell phone not collected (RPA4A=1 and ((R=PROXY &amp; PROXYPH.WTRCELL&lt;&gt;Yes) or (R=FUMEM &amp; RPHONE.WTRCELL&lt;&gt;Yes))); or RPA4A=2 &amp; RPHONE.WTRCELL&lt;&gt;Yes; or RPA4A=3 &amp; OPPHONE.WTRCELL&lt;&gt;Yes)</td>
</tr>
</tbody>
</table>

GO TO RPA9EP3
GO TO RPA9EP4
GO TO RPA9EP5

RPA9EP2. (CATI) Earlier, we recorded [R=PROXY or R=FUMEM w/1 EMAIL: the following email address / R=FUMEM w/2 EMAILS: two email addresses] for you:
READ EMAIL ADDRESSES TO R
[R=PROXY: [RPAY1H] / R=FUMEM: [RPAY2H]]
[R=FUMEM w/2 EMAILS: [RPAY2J]]
[R=PROXY, or R=FUMEM w/1 EMAIL: Is this the email we should / R=FUMEM w/2 EMAILS: Which of these should we] provide to JP Morgan Chase Bank (for your electronic payment)?
• If R prefers a text instead, GO BACK to RPAY9EP1 and ENTER [2]
• Ctrl-D and Ctrl-R not allowed - we must have an email or cell phone to process electronic payments
• For DK/RF, GO BACK to RPAY9A and select a different payment option
• ENTER [5] if R does not want to use (one of) the email(s) reported earlier

1. \( [R=\text{PROXY} \text{ or } R=\text{FUMEM} \text{ with 1 email}] = \text{Yes} \) / \( R=\text{FUMEM} \text{ with 2 emails} \): [RPAY2H] \( \rightarrow \) (Assign RPAY9EP3) GO TO RPAY8
2. \( R=\text{FUMEM} \text{ with 2 emails} \): [RPAY2J] \( \rightarrow \) GO TO RPAY9EP3
3. \( R=\text{PROXY} \text{ or } R=\text{FUMEM} \text{ with 2 emails} \): [RPAY2J]

(WEB) You previously reported [\( R=\text{PROXY} \text{ or } R=\text{FUMEM} \text{ with 1 email} \): two email addresses]:
- \( R=\text{PROXY} \text{ with 1 email} \): [RPAY1H] / \( R=\text{FUMEM} \text{ with 1 email} \): [RPAY2H]
- \( R=\text{FUMEM} \text{ with 2 emails} \): [RPAY2J]

\( R=\text{PROXY} \text{ or } R=\text{FUMEM} \text{ with 1 email} \): Is this the email we should / \( R=\text{FUMEM} \text{ with 2 emails} \): Which of these should we provide to JP Morgan Chase Bank for your electronic payment?

1. \( R=\text{PROXY} \text{ or } R=\text{FUMEM} \text{ with 1 email} \): [RPAY2H] \( \rightarrow \) (Assign RPAY9EP3) GO TO RPAY8
2. \( R=\text{FUMEM} \text{ with 2 emails} \): [RPAY2J] \( \rightarrow \) GO TO WEB END PAGE
3. \( R=\text{PROXY} \text{ or } R=\text{FUMEM} \text{ with 1 email} \): [RPAY2J] \( \rightarrow \) GO TO RPAY9EP3
4. \( R=\text{FUMEM} \text{ with 2 emails} \): [RPAY2J] \( \rightarrow \) GO TO RPAY9EP3

CHECK for NA: Your response is required.

RPAY9EP3. (CATI) What email address should we provide to JP Morgan Chase Bank (for \( RPAY4A=1: \text{your} / RPAY4A=2: \text{REFERENCE PERSON} \text{’s} / RPAY4A=3: \text{OTHER PAYEE} \text{’s} \) electronic payment)?
- ENTER email address, then READ BACK and VERIFY with Respondent
- If R prefers a text instead, GO BACK to RPAY9EP1 and ENTER [2]
- Ctrl-D and Ctrl-R not allowed - we must have an email or cell phone to process electronic payments
- For DK/RF, GO BACK to RPAY9A and select a different payment option

String 50 \( \rightarrow \) GO TO RPAY8

(WEB) Please enter the email address that we should provide to JP Morgan Chase Bank for \( RPAY4A=1: \text{your} / RPAY4A=2: \text{REFERENCE PERSON} \text{’s} / RPAY4A=3: \text{OTHER PAYEE} \text{’s} \) electronic payment.

Email String 50 \( \rightarrow \) GO TO WEB END PAGE
CHECK for NA: Your response is required.

RPAY9EP4. (CATI) Earlier, we recorded the following cell phone number for \( RPAY4A=1: \text{you} / RPAY4A=2: \text{REFERENCE PERSON} \text{’s} / RPAY4A=3: \text{OTHER PAYEE} \text{’s} \):
- READ CELL PHONE NUMBER TO R
  - \([\text{PROXYPHONE.CELLPH/CELLFOR}] / [\text{PHONE.CELLPH/CELLFOR}] / [\text{OPPHONE.CELLPH/CELLFOR}]\)

Is this the cell phone number we should provide to JP Morgan Chase Bank (for \( RPAY4A=1: \text{your} / RPAY4A=2: \text{REFERENCE PERSON} \text{’s} / RPAY4A=3: \text{OTHER PAYEE} \text{’s} \) electronic payment)?
- If R prefers an email instead, GO BACK to RPAY9EP1 and ENTER [1]
- Ctrl-D and Ctrl-R not allowed - we must have an email or cell phone to process electronic payments
- For DK/RF, GO BACK to RPAY9A and select a different payment option
- ENTER [5] if R does not want to use the cell phone reported earlier

1. Yes \( \rightarrow \) (Assign RPAY9EP5) \hspace{1cm} 5. No

GO TO RPAY8
GO TO RPAY9EP5
(WEB) You previously reported the following cell phone number for [RPAY4A=1: you / RPAY4A=2: [REFERENCE PERSON] / RPAY4A=3: [OTHER PAYEE]]:

[[PROXYPH.CELLPH/CELLFOR] / [REFERENCE PERSONHONE.CELLPH/CELLFOR] / [OPPHONE.CELLPH/CELLFOR]]

Is this the cell phone number we should provide to JP Morgan Chase Bank for [RPAY4A=1: your / RPAY4A=2: [REFERENCE PERSON]'s / RPAY4A=3: [OTHER PAYEE]'s] electronic payment?

1. Yes → (Assign RPAY9EP5) 5. No

GO TO WEB END PAGE GO TO RPAY9EP5

CHECK for NA: Your response is required.

RPAY9EP5. (CATI) What cell phone number should we provide to JP Morgan Chase Bank (for [RPAY4A=1: your / RPAY4A=2: [REFERENCE PERSON]'s / RPAY4A=3: [OTHER PAYEE]'s] electronic payment)?

- ENTER cell phone number, then READ BACK and VERIFY with Respondent
- If R prefers an email instead, GO BACK to RPAY9EP1 and ENTER [1]
- Ctrl-D and Ctrl-R not allowed - we must have an email or cell phone to process electronic payments
- For DK/RF, GO BACK to RPAY9A and select a different payment option
- Please enter this phone number starting with the area code. Do not include a long distance code/prefix 1.

String 20

GO TO RPAY8

(WEB) Please enter the cell phone number that we should provide to JP Morgan Chase Bank for [RPAY4A=1: your / RPAY4A=2: [REFERENCE PERSON]'s / RPAY4A=3: [OTHER PAYEE]'s] electronic payment.

Please enter this phone number starting with the area code. Do not include a long distance code/prefix 1.

Cell Phone String 20

GO TO WEB END PAGE

CHECK for WEB END PAGE

CHECK for NO PAYMENT SELECTED (RPAY4A<>Declined and RPAY9A<>Check, Money Order, Cash, Electronic and RPAY9D<>Non-standard (EP), Additional/New (EP)): You must select an interview payment type at RPAY9A or RPAY9D.
### Saliva Collection

**SALIVACKPT: CAI Checkpoint. Whether Any FU Members Flagged for Saliva Collection**

At Least One FU Member Flagged Eligible for Saliva Collection

**{\texttt{FTFUHU=FU}} \& {\texttt{IWTYPE=1,3}} \& {\texttt{PYPERSINFO.SALIVA=1}} \&
\begin{align*}
& ({\texttt{AddrPayment.RMailAddr.CNTRYCODE=185}} \& {\texttt{RPay3A=5}}) \\
& \text{OR} \quad ({\texttt{Addr.Payment.RPay3B.Country=185}} \& {\texttt{RPay3A=1}}) \\
\end{align*}**

No Eligible FU Members Flagged for Saliva Collection

FU CDS Eligible  
\(\texttt{CDSSample2=1} \& \texttt{CDSSample1=0}\)

FU TAS Eligible  
\(\texttt{CDSSample1=1} \& \texttt{CDSSample2=0}\)

FU CDS & TAS Eligible  
\(\texttt{CDSSample1=1} \& \texttt{CDSSample2=1}\)

No FU CDS or TAS Eligible  
\(\texttt{CDSSample1=0} \& \texttt{CDSSample2=0}\)

---

**Thank You**

RPAY8. **(CATI ONLY)** 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.

[\texttt{RPAY9EP1=EMAIL}]: Please check the email selected for payment for information from JP Morgan Chase Bank, including junk and spam folders. The email expires after 48 hours.

- ENTER [1] to continue

1. Continue → GO TO RPAY10A

WEB END PAGE. **(WEB ONLY)** You have finished the interview. Thank you very much for your participation and your contributions to the Family Economics Study!

[\texttt{RPAY9EP1=EMAIL}]: Please check the email selected for payment for information from JP Morgan Chase Bank, INCLUDING junk and spam folders. The email expires after 48 hours.

(*End of interview. Assign \texttt{RPAY8=1, IWCOMPLETE=1, IWPARTIAL=0}.*

---

IWPAYWHO. Who Receives Interview Payment

<table>
<thead>
<tr>
<th>1. Reference Person</th>
<th>2. Spouse</th>
<th>3. Partner</th>
<th>4. OFUM</th>
</tr>
</thead>
<tbody>
<tr>
<td>5. Declined</td>
<td>6. Other payee</td>
<td>7. Proxy</td>
<td>8. None; Prepay okay</td>
</tr>
</tbody>
</table>

IWPAYAMT. Amount of Interview Payment

<table>
<thead>
<tr>
<th>0.00</th>
</tr>
</thead>
</table>

**CATTI & WEB:** \texttt{WTRPREPAID=1} \& \texttt{RPAY4PP=1}; or \texttt{WTRPREPAID=1} \& \texttt{RPAY4PP=2, 5} \& \texttt{RPAY4A=4}; or \texttt{WTRPREPAID=5} \& \texttt{RPAY4A=4}

Payment (+ 10.00)

**CATTI & WEB:** \texttt{WTRPREPAID=5} \& \texttt{RPAY9A=1, 2, 6 (+ CELL PHONE IF RPAY9D=3)}

**CATTI ONLY:** \texttt{WTRPREPAID=1} \& \texttt{RPAY4PP=2, 5} \& \texttt{RPAY9A=5 (+ CELL PHONE)}; or \texttt{WTRPREPAID=5} \& \texttt{RPAY9A=5 (+ CELL PHONE)}

**RPAY9dAmt (+ 10.00)**

**CATTI ONLY:** \texttt{WTRPREPAID=1} \& \texttt{RPAY4PP=2, 5} \& \texttt{RPAY9A=7} \& \texttt{RPAY9D=1, 4, 5, 6 (+ CELL PHONE)}; or \texttt{WTRPREPAID=5} \& \texttt{RPAY9A=7} \& \texttt{RPAY9D=1, 4, 5, 6 (+ CELL PHONE)}

IWPAYMODE. Mode of Interview Payment

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

**CATTI & WEB:** \texttt{WTRPREPAID=1} \& \texttt{RPAY4PP=2, 5} \& \texttt{(RPAY9A=1 OR RPAY9D=1, 4)}; or \texttt{WTRPREPAID=5} \& \texttt{(RPAY9A=1 OR RPAY9D=1, 4)}

**CATTI ONLY:** \texttt{WTRPREPAID=5} \& \texttt{RPAY9A=2}

**CATTI & WEB:** \texttt{WTRPREPAID=1} \& \texttt{RPAY4PP=2, 5} \& \texttt{RPAY4A=4}; or \texttt{WTRPREPAID=5} \& \texttt{RPAY4A=4}
5. Cash

CATI ONLY: WTRPREPAID=1 & RPAY4PP=2, 5 & RPAY9A=5; or WTRPREPAID=5 & RPAY9A=5

6. Electronic

CATI & WEB: WTRPREPAID=1 & RPAY4PP=2, 5 & (RPAY9A=6 or RPAY9D=5, 6); or WTRPREPAID=5 & (RPAY9A=6 or RPAY9D=5, 6)

7. None; Prepay okay

CATI & WEB: WTRPREPAID=1 & RPAY4PP=1
Locator 1
NOTE for CATI Interviews: If Locator 1 information has already been entered into MSMS, the data are pulled into the corresponding Blaise fields and updated by interviewer as needed.

RPAY10A. (CATI ONLY) Interviewer Checkpoint
• Did you or any other interviewer offer a Locator Fee to get this interview?
  1. Yes  5. No → GO TO RPAY12

ADDRPAYMENT.RPAY10B

ADDRTYPE. Which address. Assigned.

6. Locator 1

TITLE, NAMF, NAMM, NAML, SUFFIX, CNTRYCODE (COUNTRY), INCO, ADDR1, APTSTE, ADDR2, CITY, STCODE (STATE), ZIP. (CATI ONLY) Title -- e.g. “Mr”, “Mrs”, “Ms”, “Miss”, “Dr”
Enter name and mailing address for Locator #1
• If no title, PRESS [Enter] to continue
• Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 6
First Name
• Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 20
CHECK for DK, RF, or DON’T KNOW entered: A valid address is required in order for us to make a payment, including name, address line 1, city, state, zip/postal code and country. This payment will not be made until this information is provided.

Middle Name
• Ask for Middle Name but do not probe DK or RF
• If none, PRESS [Enter] to continue
• Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 20
Last Name
• Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 20
CHECK for DK, RF, or DON’T KNOW entered: A valid address is required in order for us to make a payment, including name, address line 1, city, state, zip/postal code and country. This payment will not be made until this information is provided.

Suffix -- e.g. “Sr”, “Jr
• If none, PRESS [Enter] to continue
• Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 20
Country
• ENTER [185 UNITED STATES] for Puerto Rico, U.S. Virgin Islands, Guam, American Samoa or the Northern Mariana Islands

Select  
1 – 193 (Defaults to 185/US)

In Care Of
• If none, PRESS [Enter] to continue
• Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 40
Address 1
- IF R says the mailing address contains both a street address and PO Box: ENTER street address here (Address 1) and ENTER PO Box in Address 2
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 40 CHECK for DK, RF, or DON’T KNOW entered: A valid address is required in order for us to make a payment, including name, address line 1, city, state, sip/postal code and country. This payment will not be made until this information is provided.

Apt/Suite
- If none, PRESS [Enter] to continue
- ENTER [Apt] or [Ste] plus numbers and/or letters
- Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 10

Address 2
- IF R says the mailing address contains both a street address and PO Box: ENTER PO Box here (Address 2)
- If none, PRESS [Enter] to continue
- Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 40

City
- Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

String 40 CHECK for DK, RF, or DON’T KNOW entered: A valid address is required in order for us to make a payment, including name, address line 1, city, state, sip/postal code and country. This payment will not be made until this information is provided.

State (For COUNTRY=185)
- Select 1 – 57 (Assigned 57/FC if Country<>185)

Zip Code
- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER all [0]’s

String 10 SIGNAL for Locator 1: IWER: Make sure that Locator’s name and address are complete. Payments will NOT be made to incomplete names or addresses. If any field is Missing/DK/RF, SUSPEND the interview until you have the correct information.

End RPAY10B

ADDRPAYMENT.L1PHONE

ADDRTYPE. Which phone. Assigned.
- 6. Locator 1

WTRCELL. (CATI ONLY) Does [RPAY10B.NAMF] [RPAY10B.NAML] have a cell phone?
- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER [5]

1. Yes 5. No → GO TO WTRHOME
CELLPH. (CATI ONLY) Cell Phone - Area Code and Telephone Number
What is the area code and phone number?
- If foreign phone, PRESS [ENTER] to go to foreign phone field
- Ctrl-D and Ctrl-R not allowed; For DK/RF, GO BACK and ENTER [5] at WtrCell
- Please enter this phone number starting with the area code. Do not include a long
distance code/prefix 1.

[ENTER] (___)___-___-___ → GO TO WTRHOME

↓

CELLFOR. (CATI ONLY) Cell Phone - Foreign Number
(What is the area code and phone number?)
- Ctrl-D and Ctrl-R not allowed; For DK/RF, GO BACK and ENTER [5] at WtrCell

String 20

WTRHOME. (CATI ONLY) Does [RPAY10B.NAMF] [RPAY10B.NAML] have a home phone?
- Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER [5]

1. Yes 5. No → GO TO RPAY10GG

↓

HOMEPH. (CATI ONLY) Home Phone - Area Code and Telephone Number
What is the area code and phone number?
- If foreign phone, PRESS [ENTER] to go to foreign phone field
- Ctrl-D and Ctrl-R not allowed; For DK/RF, GO BACK and ENTER [5] at WtrHome
- Please enter this phone number starting with the area code. Do not include a long
distance code/prefix 1.

[ENTER] (___)___-___-___ → GO TO RPAY10GG

↓

HOMEFOR. (CATI ONLY) Home Phone - Foreign Number
(What is the area code and phone number?)
- Ctrl-D and Ctrl-R not allowed; For DK/RF, GO BACK and ENTER [5] at WtrHome

String 20

End L1PHONE

RPAY10GG. (CATI ONLY) What is (his/her) relationship to [REFERENCE PERSON]?


RPAY10H. (CATI ONLY) How much did you offer Locator #1?
- Ctrl-D and Ctrl-R not allowed

10. Ten dollars ($10) 15. Fifteen dollars ($15) 20. Twenty dollars ($20) - with TL approval

RPAY10L. (CATI ONLY) Can Locator #1 be paid by check or did (he/she) request a money order?
- Ctrl-D and Ctrl-R not allowed


GO TO RPAY11A ↓ GO TO RPAY11A
RPAY10J. (CATI ONLY) When was Locator #1 paid?
- ENTER MM/DD/[CYEAR], with or without slashes
- Ctrl-D and Ctrl-R not allowed

Locator 2
NOTE for CATI Interviews: If Locator 2 information has already been entered into MSMS, the data are pulled into the corresponding Blaise fields and updated by interviewer as needed.

RPAY11A. (CATI ONLY) Interviewer Checkpoint
- Was there a second Locator Fee offered for this interview?
  1. Yes  5. No → GO TO RPAY12

ADDRPAYMENT.RPAY11B

ADDRTYPE. Which address. Assigned.

  7. Locator 2

TITLE, NAMF, NAMM, NAML, SUFFIX, CNTRYCODE (COUNTRY), INCO, ADDR1, APTSTE, ADDR2, CITY, STCODE (STATE), ZIP. (CATI ONLY) Title -- e.g. “Mr”, “Mrs”, “Ms”, “Miss”, “Dr”
Enter name and mailing address for Locator #2
- If no title, PRESS [Enter] to continue
- Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 6
  First Name
  - Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]
  String 20  CHECK for DK, RF, or DON’T KNOW entered: A valid address is required in order for us to makes a payment, including name, address line 1, city, state, sip/postal code and country. This payment will not be made until this information is provided.

Middle Name
- Ask for Middle Name but do not probe DK or RF
- If none, PRESS [Enter] to continue
- Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 20
  Last Name
  - Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]
  String 20  CHECK for DK, RF, or DON’T KNOW entered: A valid address is required in order for us to makes a payment, including name, address line 1, city, state, sip/postal code and country. This payment will not be made until this information is provided.

Suffix -- e.g. “Sr”, “Jr
- If none, PRESS [Enter] to continue
- Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

String 20
  Country
- ENTER [185 UNITED STATES] for Puerto Rico, U.S. Virgin Islands, Guam, American Samoa or the Northern Mariana Islands

Select ▼ 1 – 193 (Defaults to 185/US)
In Care Of
- If none, PRESS [Enter] to continue
• Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

**String 40**

Address 1
• IF R says the mailing address contains both a street address and PO Box: ENTER street address here (Address 1) and ENTER PO Box in Address 2
• Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

**String 40**  
CHECK for DK, RF, or DON'T KNOW entered: A valid address is required in order for us to make a payment, including name, address line 1, city, state, sip/postal code and country. This payment will not be made until this information is provided.

Apt/Suite
• If none, PRESS [Enter] to continue
• ENTER [Apt] or [Ste] plus numbers and /or letters
• Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

**String 10**

Address 2
• IF R says the mailing address contains both a street address and PO Box: ENTER PO Box here (Address 2)
• If none, PRESS [Enter] to continue
• Ctrl-D and Ctrl-R not allowed; For DK/RF, PRESS [Enter] to continue

**String 40**

City
• Ctrl-D and Ctrl-R not allowed; For DK/RF type [DK] or [RF]

**String 40**  
CHECK for DK, RF, or DON'T KNOW entered: A valid address is required in order for us to make a payment, including name, address line 1, city, state, sip/postal code and country. This payment will not be made until this information is provided.

State  
(For COUNTRY=185)

Select  

1 – 57 (Assigned 57/FC if Country<>185)

Zip Code
• Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER all [0]'s

**String 10**

SIGNAL for Locator 2: IWER: Make sure that Locator’s name and address are complete. Payments will NOT be made to incomplete names or addresses. If any field is Missing/DK/RF, SUSPEND the interview until you have the correct information.

**End RPAY11B**

**ADDRPAYMENT.L2PHONE**

ADDRTYPE. Which phone. Assigned.

7. Locator 2

**WTRCELL. (CATI ONLY)** Does [RPAY11B.NAMF] [RPAY11B.NAML] have a cell phone?
• Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER [S]

1. Yes  5. No  → GO TO WTRHOME

**CELLPH. (CATI ONLY)** Cell Phone - Area Code and Telephone Number
What is the area code and phone number?
• If foreign phone, PRESS [ENTER] to go to foreign phone field
• Ctrl-D and Ctrl-R not allowed; For DK/RF, GO BACK and ENTER [S] at WtrCell
Please enter this phone number starting with the area code. Do not include a long distance code/prefix 1.

[ENTER] (___)___-____ → GO TO WTRHOME

CELLFOR. (CATI ONLY) Cell Phone - Foreign Number
(What is the area code and phone number?)
• Ctrl-D and Ctrl-R not allowed; For DK/RF, GO BACK and ENTER [5] at WtrCell

String 20

WTRHOME. (CATI ONLY) Does [RPAY11B.NAMF] [RPAY11B.NAML] have a home phone?
• Ctrl-D and Ctrl-R not allowed; For DK/RF ENTER [5]

1. Yes 5. No → GO TO RPAY11GG

HOMEPH. (CATI ONLY) Home Phone - Area Code and Telephone Number
What is the area code and phone number?
• If foreign phone, PRESS [ENTER] to go to foreign phone field
• Ctrl-D and Ctrl-R not allowed; For DK/RF, GO BACK and ENTER [5] at WtrHome
• Please enter this phone number starting with the area code. Do not include a long distance code/prefix 1.

[ENTER] (___)___-____ → GO TO RPAY11GG

HOMEFOR. (CATI ONLY) Home Phone - Foreign Number
(What is the area code and phone number?)
• Ctrl-D and Ctrl-R not allowed; For DK/RF, GO BACK and ENTER [5] at WtrHome

String 20

End L2PHONE

RPAY11GG. (CATI ONLY) What is (his/her) relationship to [REFERENCE PERSON]?


RPAY11H. (CATI ONLY) How much did you offer Locator #2?
• Ctrl-D and Ctrl-R not allowed

10. Ten dollars ($10)  15. Fifteen dollars ($15)  20. Twenty dollars ($20) - with TL approval

RPAY11I. (CATI ONLY) Can Locator #2 be paid by check or did (he/she) request a money order?
• Ctrl-D and Ctrl-R not allowed

GO TO RPAY12

RPAY11J. (CATI ONLY) When was Locator #2 paid?
• ENTER MM/DD/[CYEAR], with or without slashes
• Ctrl-D and Ctrl-R not allowed

__/__/ [CYEAR]
Payment Problems

RPAY12. (CATI ONLY) Were there any Respondent or Locator payment problems reported by this Respondent?

1. Yes  
5. No  
→ GO TO INTERVIEW END SECTION

↓

RPAY12SPEC. (CATI ONLY) Please provide details of payment issue.

String 500

GO TO INTERVIEW END SECTION

End ADDRPAYMENT
CATI Interview End

TOC

IWCOMPLETE. (CATI ONLY) You have reached the end of the Interview.
   • ENTER [1] to complete.

1. Interview (Module) Complete

IWPARTIAL. (CATI ONLY) 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

SIGNAL for IWPARTIAL=1005: IWER: Are you sure that this is an APPROVED Partial interview? If you have approval from your TL to make this a Partial interview, click Suppress to continue. Otherwise, if this is a Completed interview, click Close and ENTER [0].