PSID A national study of socioeconomics and health over lifetimes and across generations

PSID Main Interview User Manual: Release 2017

The PSID main interview user manual was prepared by April Beaule, Flannery Campbell, Mary Dascola, Noura Insolera, David Johnson, Paul Juska, Katherine McGonagle, and Jerry Warra. The manual draws heavily from documentation from prior years written by numerous PSID staff members.

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The Panel Study of Income Dynamics (PSID) is a household panel survey that began in 1968. This user manual serves as the primary source of documentation for the 2015 wave of the main interview. In addition, it provides critical information to users of the PSID such as the sample design, survey content, how to obtain the data, data quality, and much more. The manual includes important historical information about the survey, as well as information about the most recent data. For new users, this is the first document they should read before beginning to use the data.

Through the years, thousands of pages of PSID documentation, guides to using the data, and other such resources have been distributed to users. The current document does not replace these prior documents. Instead, this document serves as a starting place for understanding the PSID, with a focus on describing changes in the key features over the years. Within this document we point users to documentation from prior years where historical information is described in greater detail.

We expect the content of this manual to evolve and improve over time to meet the needs of the user community. Please contact us at psidhelp@umich.edu if you have suggestions for enhancing the manual or if you find errors.

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CDS: Child Development Supplement

CAI: Computer assisted interviewing

CATI: Computer assisted telephone interviewing

CRCS: Childhood Retrospective Circumstances Study

DUST: Disability and Use of Time Study

EHC: Event history calendar

FIMS: Family Identification Mapping System

FU: Family unit

ISR: Institute for Social Research

NIA: National Institute on Aging

NICHD: National Institute of Child Health and Human Development

NSF: National Science Foundation

OEO: Office of Economic Opportunity

OFUM: Other Family Unit Member

PSID: Panel Study of Income Dynamics

SEO sample: Survey of Economic Opportunity sample

SRC sample: Survey Research Center sample

TAS: Transition into Adulthood Supplement

WB: Wellbeing and Daily Life Supplement

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1. INTRODUCTION TO THE PSID TOC

The PSID was created to assess President Lyndon Johnson's War on Poverty. In 1966 and 1967, the Office of Economic Opportunity (OEO) directed the U.S. Bureau of the Census to conduct a study called the Survey of Economic Opportunity (SEO), which completed interviews with about 30,000 households. Interest in continuing this national study led OEO to approach the Survey Research Center (SRC) at the University of Michigan about interviewing a sub-sample of approximately 2,000 low-income SEO households. Professor James N. Morgan, who became the new study's director at SRC, argued successfully for adding a fresh cross-section of households from the SRC national sampling frame so that the study would be representative of the entire population of the United States, including non-poor as well as poor households. In addition, it was fortuitously decided to follow members of the families who moved away from their original households, such as children who came of age during the study. In this way, the sample could remain representative of the nation's families and individuals over time. This study became what is now called the Panel Study of Income Dynamics (Hill, 1992; McGonagle, Schoeni, Sastry & Freedman, 2012).

The PSID has now collected data for almost 50 years. More than 75,000 people have participated in the PSID and as many as six generations within sample families are represented. The mission of the PSID has broadened well beyond its original focus on income and poverty dynamics. As a result, the PSID has been used in thousands of peer-reviewed publications, and the user base has grown increasingly diverse, drawing in psychologists, medical researchers, public health scholars, geographers, and others. Numerous countries have developed their own PSID-like studies, facilitating cross national comparative research.

2. SAMPLE DESIGN AND FOLLOWING RULES TOC

2.1 Core sample

The PSID was originally designed to study the dynamics of income and poverty. Thus, the original 1968 PSID sample was drawn from two independent samples: an over-sample of 1,872 low income families from the Survey of Economic Opportunity (the "SEO sample") and a nationally representative sample of 2,930 families designed by the Survey Research Center at the University of Michigan (the "SRC sample"). The oversampling of families who were poor in the late 1960s resulted in a sizable subsample of African Americans. These two samples combined constitute a national probability sample of U.S. families as of 1968.

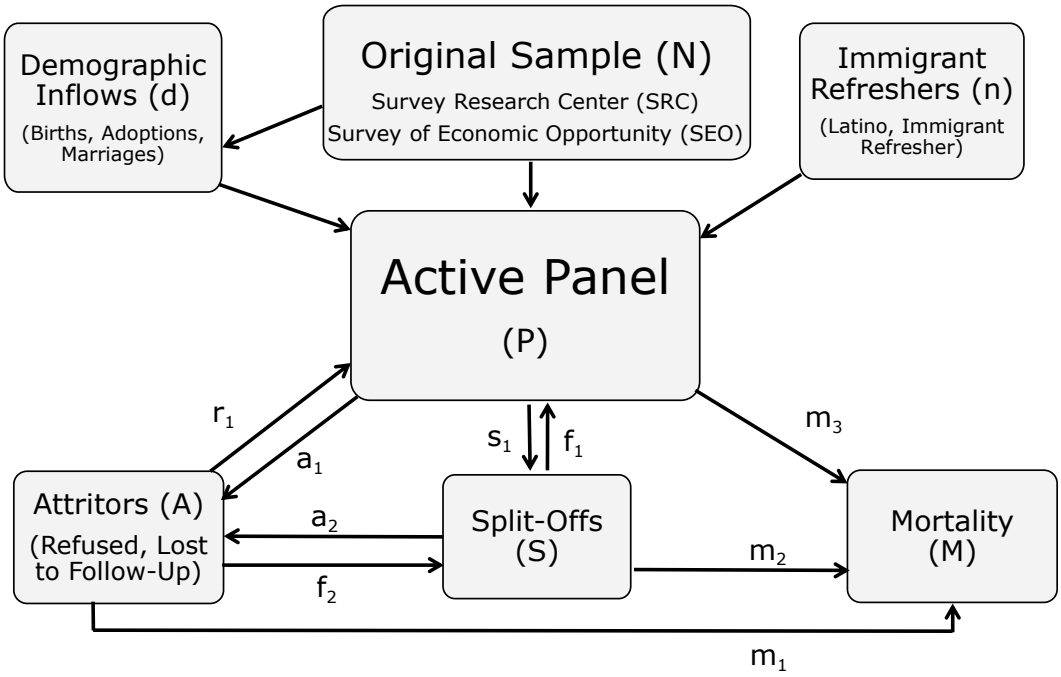
The rules for following individuals were designed to maintain a representative sample of families at any point in time as well as across time. To accomplish this, PSID "sample persons" include all persons living in the PSID families in 1968 plus anyone subsequently born to or adopted by a sample person. All

sample members are followed even when leaving to establish separate family units (FUs). This procedure replicates the population's family-building activity and produces a dynamic sample of families each year.

PSID families also include many "non-sample persons." The most common example is people who after 1968 marry sample persons. Information on non-sample persons is collected while they are living in the same family unit as a sample person. However, once they stop living with a sample person, their household is not interviewed.

The steady-state panel design is depicted in Figure 1. Flows of people into the panel come from three sources: the original 1968 sample (*N*); the 1997 refresher sample of post-1968 immigrants (*n*), which is described below; and births and marriages in existing families (*d*). The intergenerational element is represented by children who split off (s_1) as adults to form their own family units (*S*). Because of the follow-status rules (f_1, f_2), success in bringing in new families (i.e., boosting f_1, f_2), strategies to minimize attrition (a_1, a_2), and re-contacting (r_1) families refusing to be interviewed or not located (*A*) in previous waves, the PSID active panel sample (*P*) has grown despite losses due to mortality (*m1*, *m2*, *m3*) and attrition from the active panel.

Figure 1. Steady State Panel Schematic



This self-replacing design implies that for many PSID families the data include self-reported information on multiple generations within the same family at various points in their lives. Through multiple waves collected over a long period on a national sample, the PSID is the only data set ever to provide information on life course and multigenerational economic conditions, well-being, and health in a long-term panel representative of the full U.S. population.

2.2 Immigrant refresher samples TOC

While the original design of the study augmented the sample with new birth cohorts each wave, it did not represent families who arrived in the United States after 1968 (post-1968 immigrants who co-resided with PSID sample members are captured in the data, but they are not followed when they are no longer co-residing with sample member). To address this limitation, efforts have been made to add samples of immigrants who arrived in the United States after 1968. In 1990, the PSID added roughly 2,000 Latino households, including families originally from Mexico, Puerto Rico, and Cuba. But while this sample did represent three major groups of immigrants, it did not fully represent all post-1968 immigrants. Because of this crucial shortcoming, and a lack of sufficient funding, the Latino sample was dropped after 1995.

A total of approximately 500 post-1968 immigrant families were added in 1997/1999 to update the PSID by adding a representative sample of recent immigrants to the United States: this sample is called the 1997 PSID Immigrant Refresher Sample. A detailed description of the sample design for the immigrant sample is provided here. Immigrants eligible for the supplemental sample were those who immigrated to the United States after 1968 or were children born in 1969 or later to people who were not living in the United States in 1968. These recent immigrants were not represented in the PSID sample before 1997. Because some of the immigrant refresher families subsequently created split-off families, the number of families originating from the 1997 immigrant refresher sample continues to grow.

2.3 Sample reduction in 1997 TOC

Because the original sample of roughly 5,000 families had grown substantially due to split-off families being added to the sample and funding was not available to continue to interview the large number of families, the original core sample was reduced from roughly 8,500 families in 1996 to approximately 6,300 in 1997. The majority of the cuts were taken from the SEO sample. However, 43% of the SEO sample, or 1,714 families, remained in the active sample in 1997. Through natural sample growth generated by split-offs, the SEO sample continues to grow. Because the SEO sample consists largely of low-income African-American families, it supports research on economic transitions, poverty, and disparities in health and other resources.

2.4 Sample following rules TOC

PSID follows sample members when they change households. Information is gathered about these sample members and others residing in the same household. A family member who moves out of a PSID family unit is eligible for interviewing as a separate family unit if they are a sample member and living in a different, independent household. If a sample member moves to an institution such as a prison, a college dormitory, or the military, the PSID records this fact and attaches an “institutional status” data record to the family they left. If the only sample person or the entire household is living in institutional housing other than prison, PSID still attempts to complete an interview for this family. We code the type

of institution they are living in the variable on the yearly family file labeled “Type Institution” (ER60008 in 2015).

For sample members still attached to active PSID families, the PSID keeps track of the location of sample members living in institutional housing, and attempts to interview them if and when they leave the institution.

Between 1968 and 1991, the sample following rules stated that individuals eligible for the next wave of interviewing would include only persons present in the prior wave. Therefore, during this period individuals who could not be located or who refused to be interviewed were not followed in later waves. Only if a non-response sample person subsequently moved into a currently responding family unit would they be followed in the future. While the "reappearance" of some formerly non-response sample individuals occurred in each wave, it was a relatively rare event.

In 1992, two new approaches for recontacting former non-response sample cases were adopted. First, in 1992 interviews were attempted for all sample persons who responded in 1990 but had become non-response in 1991, whether reinterview families or splitoffs. Second, interviews were attempted during 1992 for original sample individuals who had become non-response in any wave prior to 1991. These new approaches provided support for attempting a large-scale recontact effort for non-Latino cases, which occurred during the 1993 and 1994 waves. Non-response sample individuals who were last present in a PSID family in 1991 or earlier and who shared an original family identifier (1968 interview number) with someone who was still responding in 1992 were selected. More information about the recontact efforts and results are described in the 1992 and 1993 main interview documentation.

This work indicated that a significant portion of individuals who refused or were lost in one wave could in fact be successfully brought back into the study. Thus, starting in 1993, individuals who refused or were lost in a particular wave were designated as “recontact sample” and were followed in the subsequent wave. Once a family was non-response for two consecutive waves, the family was no longer followed.

Following rules for sample individuals under age 18 were changed starting in 1993. In previous waves, PSID did not follow as split-offs sample members under 18 years of age if they left the family unit and their new family unit did not contain a sample person (e.g., a sample child resided with a nonsample parent as a consequence of a divorce). Starting in 1993, the study began to follow these younger persons and attempt to interview an adult in the new family unit. As a corollary, the PSID family composition rules changed. Specifically, PSID families have always included a sample member as the Head or the Spouse/Partner of the family unit, but this became impossible in some cases where we followed the underage sample member who moved out with a nonsample parent. Therefore, although all families contain at least one sample member, both the Head and the Spouse/Partner may be nonsample. This could occur, for example, if an underage sample member moves out with a nonsample parent who then remarries.

2.5 New Terminology in 2015

Historically, PSID has used the term *Head* to refer to the husband in a married couple and to a single adult of either sex. The term *Wife* has been used for a female in a married couple, and *"Wife"* for a cohabiting female. This terminology was adopted from the Census Bureau in 1968 at the start of the PSID and has been maintained for consistency through the 2013 wave. Starting with the 2015 wave, the term *Spouse/Partner* has replaced Wife/"Wife". For additional information on the sex of the Head and the family unit member's relationships to the head, please see the corresponding variables from 2015 ('Sex of Head – ER60018' and 'Relationship to Head – ER34303').

2.6 Sample sizes TOC

Reported in Table 1 are the number of individuals and families in each of the main interview waves by sample type, where sample type identifies SRC, SEO, Latino, and immigrant refresher. This table includes both sample and non-sample persons.

Table 2 reports the number of sample persons (non-sample persons are excluded) in each wave by whether they are in the SRC, SEO, or immigrant refresher sample – the Latino sample is excluded. In addition, the number of original sample persons – that is, individuals who were living in 1968 PSID family units – and the number of sample persons who are a Head or Spouse are reported for each wave. In 2015, there are 3,702 individuals who were also present in the original sample in 1968. If we adjust for weights, expected mortality, and the sample cut in 1997, this number would represent about 45 percent of the original sample. While the number of families has increased substantially, the number of Heads and Spouses who are sample persons has not changed appreciably in part because non-sample persons have become Heads and Spouses after 1968. The final two columns report the number of Heads and Spouses and the number of all individuals who have been in the PSID for at least five waves and therefore can contribute to substantial panel analyses. These numbers were fairly steady until the sample was trimmed in 1997; they dropped substantially in 1997, but have increased subsequently.

Reported in Table 3 is the number of individuals entering and exiting the PSID in each wave, by reason for exit and reason for entry. Although the exact number varies over time, roughly 100 individuals in the PSID die each year, or roughly 200 between each wave when interviewing became biennial in 1997. A total of 5,617 individuals were dropped in 1997 when the sample was trimmed. Each year, 300-400 children are born into PSID families, or roughly 600-800 between adjacent post-1997 waves. In most years, new sample members who make their first entry into the PSID (by moving into, rather than being born into, a sample household) are individuals whose parents are PSID sample members, but they themselves were born while their parent was not part of an interviewed family unit. These individuals were very rare prior to the recontact effort in 1993 and 1994. The large number of new sample members who first entered in 1997 is associated with the addition of the new immigrant sample. A substantial number of re-entrants were interviewed in 1993 and 1994 as part of the recontact efforts in those years.

These re-entrants were living with individuals who had never participated in the PSID in the past, hence the large number of non-sample individuals who first entered the PSID in 1993 and 1994. The number of reentrants after 1994 was higher than before 1993 because PSID began attempting interviews with individuals who were non-response in the prior wave.

Table 1. Number of Individuals and Families in Each Wave, by Sample Type: 1968-2015

	Families					Individuals				
Year	Core SRC	Core SEO	Latino	Immigrant	Total	Core SRC	Core SEO	Latino	Immigrant	Total
1968	2,930	1,872			4,802	9,461	8,772			18,233
1969	2,643	1,817			4,460	8,643	8,569			17,212
1970	2,754	1,891			4,645	8,752	8,597			17,349
1971	2,834	2,006			4,840	8,827	8,763			17,590
1972	2,947	2,113			5,060	9,109	8,942			18,051
1973	3,057	2,228			5,285	9,191	9,045			18,236
1974	3,165	2,352			5,517	9,286	9,110			18,396
1975	3,252	2,473			5,725	9,437	9,186			18,623
1976	3,318	2,544			5,862	9,556	9,212			18,768
1977	3,382	2,625			6,007	9,670	9,328			18,998
1978	3,416	2,738			6,154	9,697	9,443			19,140
1979	3,497	2,876			6,373	9,856	9,587			19,443
1980	3,589	2,944			6,533	10,034	9,713			19,747
1981	3,617	3,003			6,620	10,080	9,716			19,796
1982	3,673	3,069			6,742	10,232	9,880			20,112
1983	3,715	3,137			6,852	10,322	10,005			20,327
1984	3,729	3,189			6,918	10,349	10,044			20,393
1985	3,753	3,279			7,032	10,474	10,206			20,680
1986	3,750	3,268			7,018	10,400	10,037			20,437
1987	3,778	3,283			7,061	10,508	9,978			20,486
1988	3,809	3,305			7,114	10,555	9,951			20,506
1989	3,809	3,305			7,114	10,524	9,927			20,451
1990	3,935	3,393	2,043		9,371	10,677	10,068	7,452		28,197
1991	3,957	3,418	1,988		9,363	10,707	10,063	7,075		27,845
1992	4,051	3,510	2,268		9,829	10,934	10,211	8,130		29,275
1993	4,231	3,642	2,104		9,977	11,560	10,751	7,415		29,726
1994	4,624	4,034	2,106		10,764	12,576	11,936	7,033		31,545
1995	4,565	4,002	1,834		10,401	12,314	11,615	5,955		29,884
1996	4,547	3,964			8,511	12,294	11,516			23,810
1997	4,592	1,714		441	6,747	12,363	5,703		1,695	19,761
1999	4,740	1,787		470	6,997	12,787	5,937		1,791	20,515
2001	4,970	1,945		491	7,406	13,340	6,232		1,828	21,400
2003	5,159	2,126		537	7,822	13,684	6,661		1,945	22,290
2005	5,175	2,260		567	8,002	13,873	6,998		2,047	22,918
2007	5,295	2,412		582	8,289	14,150	7,263		2,088	23,501
2009	5,446	2,607		637	8,690	14,606	7,593		2,186	24,385
2011	5,495	2,767		645	8,907	14,607	7,844		2,210	24,661
2013	5,450	2,932		681	9,063	14,562	8,099		2,291	24,952
2015	5,318	3,037		693	9,048	14,151	8,247		2,239	24,637

Notes: Sample type is defined by ER30001: Core SRC=1-2930/Immigrant=3001-3511/Core Seo=5001-6872/Latino=7000+. Sequence Number (SN) for each year can be used to determine family level (SN=1) and individuals in that year (SN>=1).

Table 2. Composition of Individuals in the PSID: Non-Sample Persons Excluded

Individuals in the PSID who are original or born in or moved in sample persons

Year	Total	SRC	SEO	1997 Immigrant	Original Sample Member from 68 Wave (ER32006=1) and 1968 ID Number = SRC / SEO	Head or Spouse/Partner	Heads or Spouse/Partner in PSID for 5 Waves or more	Individuals in PSID for 5 Waves or more
1968	18,233	9,461	8,772		18,233	7,878		
1969	16,327	8,261	8,066		16,050	7,118		
1970	16,130	8,184	7,946		15,486	7,160		
1971	16,089	8,117	7,972		15,117	7,238		
1972	16,074	8,128	7,946		14,724	7,330	6,260	14,608
1973	15,979	8,075	7,904		14,306	7,445	6,299	14,505
1974	15,922	8,034	7,888		13,917	7,562	6,396	14,462
1975	15,903	8,031	7,872		13,556	7,668	6,463	14,417
1976	15,830	8,009	7,821		13,105	7,707	6,510	14,283
1977	15,810	8,032	7,778		12,715	7,769	6,610	14,178
1978	15,821	8,004	7,817		12,426	7,842	6,749	14,190
1979	15,830	8,022	7,808		12,064	7,995	6,848	14,122
1980	15,894	8,072	7,822		11,693	8,076	6,920	14,077
1981	15,933	8,074	7,859		11,393	8,099	6,986	14,126
1982	15,998	8,118	7,880		11,136	8,161	7,068	14,139
1983	16,074	8,147	7,927		10,842	8,218	7,194	14,216
1984	16,070	8,139	7,931		10,524	8,213	7,273	14,300
1985	16,081	8,140	7,941		10,193	8,259	7,268	14,248
1986	15,878	8,063	7,815		9,834	8,188	7,237	14,133
1987	15,822	8,081	7,741		9,512	8,168	7,223	14,069
1988	15,785	8,077	7,708		9,232	8,165	7,214	14,081
1989	15,676	8,029	7,647		8,938	8,112	7,269	14,071
1990	15,732	8,091	7,641		8,782	8,204	7,352	14,113
1991	15,701	8,093	7,608		8,524	8,184	7,355	14,124
1992	15,940	8,211	7,729		8,472	8,325	7,453	14,295
1993	16,516	8,482	8,034		8,236	8,382	7,376	14,442
1994	17,883	9,075	8,808		8,644	8,948	7,640	15,213
1995	17,557	8,924	8,633		8,294	8,807	7,605	15,161
1996	17,456	8,882	8,574		8,036	8,740	7,616	15,226
1997	14,866	8,844	4,363	1,659	5,718*	7,178	5,742	11,699
1999	15,060	8,906	4,475	1,679	5,484	7,291	5,782	11,884
2001	15,400	9,110	4,653	1,637	5,297	7,506	5,723	11,842
2003	15,759	9,198	4,888	1,673	5,124	7,776	5,656	11,848
2005	16,387	9,525	5,168	1,694	4,982	8,155	6,174	13,031
2007	16,680	9,676	5,325	1,679	4,724	8,365	6,340	13,414
2009	17,307	9,947	5,624	1,736	4,565	8,701	6,629	13,881
2011	17,412	9,908	5,783	1,721	4,298	8,843	6,715	13,912
2013	17,556	9,838	5,955	1,763	4,063	8,961	6,850	14,157
2015	17,230	9,531	5,983	1,716	3,702	8,897	6,849	13,941

Notes: Cell values were determined by the following:
Total: Year sequence number 51-59 or sequence number 1-20 and Whether Sample or NonSample (ER32006=1,2 or 3).

SRC: ER30001=1-2930; SEO=5001-6862; Immigrant: ER30001=3001-3511; Original sample: ER32006=1 (for SRC and SEO samples only; excludes 1997 Immigrant sample);
Head/Spouse: Year Relation to Head=1,2 (1968-1982) 10,20,22 (1983+). Head/Spouse in PSID > = 5 Yrs: Sum of waves for Head/Spouse>=5 up to each year, starting in 1972; Note 1997 immigrant sample persons reach up to 5 years in wave 2005
Individual in PSID >= 5 Yrs: Sum of waves for all individuals >=5 up to each year, starting in 1972; Note 1997 immigrant sample persons reach up to 5 years in wave 2005

* Sample reduction of the SEO sample occurs in 1997

Table 3. Entry and Exit of All Individuals in the PSID, Excluding Latino Sample

		Exited the PSID				Entered the PSID				
							First Entry			
Year	Total	Total	Left	Died	Dropped	Total	Born into PSID	New Sample	Nonsample	Re-entrants
1968	18,233	0	0	0	0	0	0	0	0	0
1969	17,215	1,849	1,832	17	0	831	275	21	535	0
1970	17,352	725	634	83	0	862	375	8	479	0
1971	17,593	615	509	106	0	856	338	0	506	12
1972	18,054	569	442	127	0	1,030	392	1	607	30
1973	18,239	731	618	113	0	916	355	1	536	24
1974	18,399	751	647	104	0	911	368	0	519	24
1975	18,626	701	589	112	0	928	382	2	521	23
1976	18,771	850	748	102	0	995	423	1	525	46
1977	19,001	819	714	105	0	1,049	435	2	578	34
1978	19,143	784	708	76	0	926	369	0	505	52
1979	19,447	788	696	92	0	1,092	469	2	576	45
1980	19,751	910	804	106	0	1,214	522	1	632	59
1981	19,800	928	839	89	0	977	441	0	486	50
1982	20,116	746	633	113	0	1,062	427	1	584	50
1983	20,331	924	821	103	0	1,139	440	0	618	81
1984	20,397	1,000	890	110	0	1,066	459	0	537	70
1985	20,684	982	861	121	0	1,269	482	0	683	104
1986	20,441	1,235	1,128	107	0	992	369	0	553	70
1987	20,490	1,044	925	119	0	1,093	442	0	553	98
1988	20,510	1,030	912	118	0	1,050	419	0	532	99
1989	20,455	1,105	992	113	0	1,050	381	0	562	107
1990	20,749	898	794	104	0	1,192	373	0	597	222
1991	20,774	964	830	134	0	989	401	0	508	80
1992	21,149	1,090	969	121	0	1,465	355	0	720	390
1993	22,315	1,493	1,339	154	0	2,659	456	0	1,113	1,090
1994	24,516	1,550	1,398	152	0	3,751	418	507	1,067	1,759
1995	23,933	1,440	1,321	119	0	857	259	45	496	57
1996	23,814	1,247	1,126	121	0	1,128	351	44	612	121
1997	19,765	6,695	978	103	5,614	2,646	295	1,684	504	163
1999	20,519	1,534	1,317	217	0	2,288	603	335	900	450
2001	21,404	1,401	1,193	208	0	2,286	665	69	1,005	547
2003	22,294	1,499	1,294	205	0	2,389	695	71	1,114	509
2005	22,922	1,799	1,610	189	0	2,427	782	95	1,061	489
2007	23,505	1,761	1,505	256	0	2,344	823	88	1,081	352
2009	24,389	1,682	1,475	207	0	2,566	815	118	1,092	541
2011	24,665	2,044	1,804	240	0	2,320	828	80	1,060	352
2013	24,956	2,309	2,073	236	0	2,600	750	99	1,153	598
2015	24,641	2,958	2,674	284	0	2,643	767	103	1,102	671

Notes: Two adjacent years are compared to determine values. Categories are determined as follows using example code from
Total: Y2=Y1-Total Exits + Total Entrants

Exits:

Total: Y1 sequence number (ER30314) > 0 and Y2 sequence number (er30344) = 0

Left: Total-Died

Died: Y1 sequence number (ER30314) > 0 and Y2 reason for non-response = died (ER30371=41)

Dropped: Y1 sequence number (ER30314) > 0 and Y2 reason for non-response = dropped (ER30371=80)

Entrants:

Total: Born In+New Sample+Nonsample+Re-entrants

Born In: Y2 sequence number (ER30344) > 0 and Y1 Type of Individual (ER30340)=9 and 1<=Person Number (ER30002) <=29

New Sample*: Y2 sequence number (ER30344) > 0 and Y1 Type of Individual (ER30340)=9 and 30<=Person Number (ER30002) <=169

Nonsample: Y2 sequence number (ER30344) > 0 and Y1 Type of Individual (ER30340)=9 and Person Number (ER30002) > 170

Re-entrants: Y1 sequence number (ER30314)=0 and Year of first non-response (ER32008) < Y2

*Starting with the 1993/1994 comparison an additional requirement for this group is the variable Why Follow (ER33150) in Y2 = 30 or 3

Starting in 1989/1990 must use sample ne 3 (Latinos out) - see SAS program.

*1968 Total of 18,233 includes 41 individuals who have WNR of 97 in 1968

3. SURVEY CONTENT

TOC

Since its inception in 1968, the PSID has collected extensive information on employment, income and family demographics. With input from the PSID Board of Overseers and the broader scientific community, the content has evolved to allow the study of emerging scientific and policy interests.

Table 4 shows the major topical areas contained in the main interview since 2005 as well as the average interview length by section for 2015. Table 5 shows the mean and median length of the interview for each wave since 1968. In 2015, the mean questionnaire length was 77.7 minutes. An additional 13.1 minutes were spent updating the household roster and collecting respondent contact and payment information, leading to a total mean respondent burden of 90.8 minutes.

Table 4. Average Interview Length (minutes) by Section, Main PSID Interview 2015

Topic	Questionnaire Section	2015
Housing, utilities, computer usage/internet access	A	7.3
Employment	B, C, D, E	18.2
Housework, food expenses, food assistance, transportation, education expenses, other expenditures	F	11.1
Income	G	8.8
Health status, health behaviors, health expenditures	H	14.7
Marriage and fertility	J	1.9
New head and spouse/partner background	K, L	2.9
Philanthropic giving and volunteering, religiosity, help received	M	2.3
Pensions	P	3.0
Off-year income and public assistance	R	1.9
Wealth and active savings	W	5.6

Table 5. Questionnaire length in each wave (minutes): 1968 to present

Year	Mean (Median)	Year	Mean (Median)	Year	Mean (Median)	Year	Mean (Median)
1968	63.1 (60.0)	1978	26.9 (25.0)	1988	33.6 (31.0)	1999	61.9 (59.0)
1969	61.8 (60.0)	1979	28.1 (26.0)	1989	33.9 (31.0)	2001	60.4 (57.0)
1970	60.5 (60.0)	1980	29.0 (27.0)	1990	37.4 (33.0)	2003	69.6 (65.0)*
1971	59.1 (58.0)	1981	26.5 (25.0)	1991	29.5 (27.0)	2005	73.2 (69.0)*
1972	66.2 (60.0)	1982	20.8 (20.0)	1992	31.0 (29.0)	2007	80.0 (76.0)*
1973	20.1 (20.0)	1983	23.8 (22.0)	1993	34.5 (32.0)	2009	74.9 (70.0)*
1974	23.1 (21.0)	1984	34.7 (32.0)	1994	43.9 (41.0)	2011	90.4 (85.0)
1975	26.9 (25.0)	1985	35.2 (33.0)	1995	34.6 (32.0)	2013	82.0 (78.3)*
1976	25.3 (25.0)	1986	34.9 (33.0)	1996	30.1 (27.0)	2015	77.5 (73.5)*
1977	25.0 (24.0)	1987	29.5 (28.0)	1997	39.5 (36.0)		

*Capped at 300 minutes; less than 0.3% of interviews in a given year were longer than 300 min.

The questionnaire for each wave is available under the documentation tab on the PSID website, psid.org. Also available is a companion document to the survey instrument that is prepared each wave to

assist interviewers in addressing any questions raised by the respondent during the interview. These documents are called "question by question objectives," or simply "QxQ."

3.1 Highlights of Changes in 2015 TOC

Each wave the content of the questionnaire is reviewed for scientific and policy relevance. In 2015, we enhanced content related to Internet Access, Food Security, Income for Spouses/Partners to further parallel that of Heads, Health Insurance, Children, and New Heads/Spouses/Partners Background (sections A, F, G, H, J, K and L) and made improvements to the Wealth and Pensions sections (W and P).

In addition, in response to the growing length of the questionnaire (which had reached an average of 90 minutes in 2011); a continued effort from 2013 was made to reduce respondent burden while maintaining as much consistency as possible with prior waves. We focused mainly on items that appeared to be challenging (as evidenced in part by relatively long response times) or redundant (as evidenced by analysis of the data). Where possible, "dependent interviewing" (i.e., bringing forward responses from the previous wave) was introduced so that respondents who did not experience a change since the last wave were allowed to skip detailed follow-up questions. This was continued in 2015 in sections BCDE and P. Table 6 provides an overview of changes. Users should consult the questionnaires and cross-year index for more specific details.

Table 6. Overview of Changes to the 2015 Main PSID Questionnaire

Topic (Section)	New/Enhanced Content	Dependent Interviewing	Other Streamlining (2013 item referenced for dropped items)
Housing, Utilities, Internet Access (A)	Internet access via computer, smartphone, or cell phone (A57A-A57M)	--	Computer use (A47A-A47C)
Employment (BCDE)	--	Current residence (EHC), current main job (EHC), occupation (BC/DE20), industry (BC/DE21), job title (BC/DE21a), type of employer (BC/DE22 – BC/DE24), number of employees (BC/DE25a),whether union contract (BC/DE26 – BC/DE27), years of experience (BC/DE41), address for current main job employer (BC/DE19A series), date last worked (BC/DE62 – BC/DE63)	Per-job follow-up questions limited to PYEAR and CYEAR (checkpoints and question language changed to specify the new timeframes)
Childcare, Food, Vehicles, Transportation and Expenditures (F)	Food security (FOOD1-FOOD18)	--	Car repairs/maintenance cost for previous month (F80A) dropped
Income and OFUM Education (G)	Head/Spouse/Partner income received from incorporated business, if not already reported in Section BC/DE (G11D-G11E) Spouse/Partner professional practice/trade income added to parallel Head (G52P-G52TJ10) Spouse/Partner other earnings added to parallel Head (G52U-G52V)	--	Details (commute, title, occupation, industry) no longer collected for additional Head farming/market gardening jobs not already reported on in Sections BC/DE (G18B-G18BJ10) Spouse/Partner G51A-G51B replaced by new internal hard check OFUM education series G88MO-G90A13 replaced by new series G88A-G88DD

	Spouse/Partner alimony or separate maintenance added to parallel Head (G60E-G60EE) Spouse/Partner Veteran Administration income added to parallel Head (G60F-G60H) OFUM education series updated to collect education for new OFUM (G88A-G88M3) or update education for returning OFUM (G88N-G88DD)		
Wealth (W)	Inheritance or large gift distinguished (W123A) and year received expanded to allow for multiple years per gift/inheritance (W124A)	--	W124 replaced by W124A
Pensions (P)	Items about expected retirement payments (P34) now asked only if Head/Spouse/Partner is age 40 or older	Head/Spouse/Partner pension and retirement plans through former employer	--
Health (H)	--	--	ADL and IADL checkpoints removed so that all Heads/Spouse/Partner are again asked the full ADL/IADL series (H9ACKPT, H9FCKPT, H11GCKPT, H11LCKPT)
Health Insurance (H)	Health insurance premiums – unfolding brackets now ask "per month" (H61JD-H61JF)	--	Health insurance premiums unfolding brackets (H61J**A**-H61J**C**) replaced by H61JD-H61JF
Marriages and Children (J)	Newborn series - if respondent is not the mother or father of the newborn, respondent will be asked if he/she is willing and able to answer questions about the pregnancy and birth of that newborn (OS11_1)	--	--
Background of New H/S/P (KL)	Updated new Head/Spouse/Partner education series with bachelor degree college name/location, date received, field of study/major (KL55A-KL55E), highest degree college name/location (KL57CITY-KL57COUNTRY), whether/grade currently attending (KL61A-KL61B) Updated returning Head/Spouse/Partner education series with whether education received in or outside of U.S. (KL74C), grade/date last attended prior to GED (KL77A-KL77AYR), grade/date last attended if neither HS diploma or GED (KL78A-KL78AYR), college attendance (KL78B-KL78F1), bachelor degree college name/location, date received, field of study/major (KL78F2-KL78F5YR), years attended and degree received outside U.S. (KL83A-KL83B), grade currently attending (KL84A)	--	Replaced by updated series (KL57, KL75, KL79, KL85)

4. DATA COLLECTION

TOC

4.1 Questionnaire development and testing

Questionnaire development begins early in the year prior to data collection and continues through the end of that year. PSID staff and investigators review proposed new content and consider removing or modifying existing questions. Changes are also made in response to issues that arise during processing and collection of the prior wave of data.

The full computer-assisted instrument is tested by means of a user interface that allows the tester to work through an interview and record programming bugs and revisions to the instrument on a per

question basis. The interface collects and manages a database of tester comments, which the programmer and tester then use interactively to reprogram and retest the bugs and revisions.

4.2 Interviewer training and field operations TOC

From 1968 to 1972, over 95% of the interviews were conducted face-to-face; since then, nearly all of interviews have been conducted via telephone. A single primary adult has typically served as the sole respondent and provides information about himself/herself and about all other family members (exceptions were reports of retrospective information in 1976 and 1985 when separate interviews were completed with both the Head and Spouses/Partners.) The most detailed information is collected about the Heads and Spouses/Partners of FUs.

Since 1993, the survey has been administered using a computer-assisted telephone interview (CATI). Beginning in 2003, Blaise software was used to program the questions and SurveyTrak, software developed at ISR, was used to manage sample and administrative information about the family.

The Event History Calendar (EHC), which provides 2-year long timelines of employment, residence, and features of employment across job transitions, was introduced in 2003. Having 2 years of data in these content areas has helped fill the gap of data caused by moving the study to a biennial data collection. The fine-grained EHC timeline data can be used to support the construction of traditional measures – such as weeks of employment, unemployment, and time out of the labor force in each year. Methodological research has shown that the EHC interviewing approach leads to consistently higher quality retrospective reports in comparison to traditional standardized question-asking methods (Belli et al, 2001; Belli et al, 2004). In addition, these timeline data can be used to analyze interrelated events such as the timing of auto purchases, residential moves, and employment transitions. Additional details about the EHC in the PSID are available in Belli (2003).

Beginning in 2007, a training DVD containing a description of the study terminology, concepts, and the interview sections was created and distributed to all interviewers as part of their training. The training videos are available on the PSID website. Interviewers review the DVD training material prior to an in-depth training session held in the Ann Arbor, Michigan area.

A variety of strategies are used to minimize sample attrition including incentive payments, study letters, off year address update mailings, tracking, respondent newsletters, and more. A description of these procedures is provided in Schoeni, Stafford, McGonagle, and Andreski (2013).

Table 7 reports the beginning and end dates of the field period, the percent of interviews completed by telephone, the average number of calls to complete a case, the amount of the incentive, and the percentage of interviews completed in Spanish. The table also reports the percent of FUs for whom the interview was completed by the Head, and the percent of FUs for whom the interview was completed by a sample person.

4.3 Response rates TOC

Response rates are calculated separately for the core (also known as original) sample families and for the families that were part of the immigrant refresher in 1997/1999. For each of these two samples, response rates are provided for four "interview types:" reinterview families, which are families that were interviewed in the prior wave; recontact families, which are families that were interviewed two waves prior to the current one but not the immediately prior wave; split-offs, who are individuals who became economically independent creating their own FU; and recontact split-offs, which are families that have split off from recontact families within the current interviewing cycle. The wave-to-wave response rates - that is, the percentage of families who completed an interview in the current wave among those who completed an interview in the prior wave - by sample type and by interview type are reported in Table 8.

Table 7. Characteristics of field operations: 1968 to present

Year	Number of families	Field Period		% by telephone	calls to complete a case**	% calls 8+
		Start	End*			
1968	4,802	4-Mar	10-Jun	NA	2.5 (2.0)	1.9
1969	4,460	10-Mar	9-May	NA	2.3 (2.0)	1.6
1970	4,645	1-Mar	31-May	1.2	2.5 (2.0)	2.8
1971	4,840	1-Mar	1-Jul	2.4	2.2 (2.0)	1.7
1972	5,060	1-Mar	1-Jul	2.6	2.1(1.0)	1.6
1973	5,285	1-Mar	1-Jul	76.6	2.6 (2.0)	3.7
1974	5,517	5-Mar	1-Jul	82.5	2.6 (2.0)	4.2
1975	5,725	1-Mar	1-Jul	84.5	2.7 (2.0)	4.6
1976	5,862	1-Mar	1-Jul	91.4	2.8 (2.0)	5.9
1977	6,007	1-Mar	1-Jul	83.9	2.7 (2.0)	5.4
1978	6,154	1-Mar	1-Jul	85.9	2.8 (2.0)	6.3
1979	6,373	1-Mar	1-Jul	88.4	3.0 (2.0)	8.0
1980	6,533	1-Mar	1-Jul	89.2	3.3 (3.0)	10.3
1981	6,620	1-Mar	29-Oct	91.9	3.4 (3.0)	12.0
1982	6,742	2-Mar	29-Sep	92.8	3.4 (3.0)	11.6
1983	6,852	21-Feb	11-Oct	93.4	3.4 (3.0)	12.3
1984	6,918	27-Feb	31-Oct	92.1	3.7 (3.0)	15.2
1985	7,032	4-Mar	31-Oct	91.2	14.4 (4.0)	19.6
1986	7,018	24-Feb	31-Oct	92.0	9.9 (3.0)	15.5
1987	7,061	3-Mar	25-Aug	91.8	11.5 (3.0)	14.6
1988	7,114	3-Mar	19-Sep	91.5	9.8 (3.0)	16.3
1989	7,114	2-Mar	16-Nov	91.7	7.3 (3.0)	18.1
1990	9,371	24-Feb	30-Nov	88.7	5.5 (3.0)	18.3
1991	9,363	18-Mar	24-Nov	93.9	6.4 (3.0)	22.4
1992	9,829	2-Mar	8-Dec	95.9	7.9 (4.0)	29.0
1993	9,977	20-Apr	22-Dec	97.3	6.7 (4.0)	26.4
1994	10,765	24-Feb	23-Dec	95.7	8.8 (5.0)	35.3
1995	10,401	20-Feb	20-Oct	97.9	5.9 (4.0)	24.1
1996	8,511	1-Feb	30-Jul	97.4	5.1(3.0)	18.9
1997	6,747	13-Feb	13-Oct	97.5	5.9 (4.0)	22.6
1999	6,997	31-Jan	31-Oct	na	na	na
2001	7,406	3-Mar	17-Nov	97.0	na	na
2003	7,822	14-Mar	7-Nov	96.2	10.6 (6.0)	39.6
2005	8,002	14-Mar	8-Nov	96.6	10.7 (6.0)	37.4
2007	8,289	12-Mar	31-Dec	97.5	11.2 (6.0)	38.0
2009	8,690	19-Mar	27-Dec	97.4	12.6 (6.0)	41.2
2011	8,907	3-Mar	31-Dec	98.6	13.2 (6.0)	43.6
2013	9,063	10-Mar	31-Dec	97.3	14.2 (7.0)	44.8
2015	9,048	3-Mar	31-Dec	97.0	20.3 (8.0)	51.6

* End date not exact for years 1969-1980; ** Calls top coded 8+ for years 1968-1984; NA=not applicable. na=not available. Cell values were determined using relevant variables from the Data Center, with the variable names for 1990 as follows: Number of interviewers=v18044. Field dates=v18046. Telephone=v17709=1. Number of calls=v18857. Spanish interview=v18859=1.

Table 7, Continued. Characteristics of field operations: 1968 to present

Year	Incentive ($)	% of interviews in Spanish	% of interviews provided by head	% of interviews provided by a sample person
1968	5.00	NA	93.7	99.2
1969	5.00	NA	93.6	97.9
1970	5.00	NA	92.8	95.5
1971	5.00	NA	92.7	93.6
1972	5.00	NA	92.5	91.8
1973	7.50	NA	90.2	90.2
1974	7.50	NA	88.8	89.7
1975	7.50	NA	88.3	88.8
1976	7.50	NA	92.6	85.7
1977	7.50	NA	90.0	86.5
1978	7.50	NA	90.2	85.1
1979	7.50	NA	88.5	85.4
1980	9.00	NA	85.8	85.2
1981	10.00	NA	84.3	86.0
1982	10.00	NA	83.8	86.5
1983	10.00	NA	82.2	86.1
1984	10.00	NA	81.0	86.1
1985	10.00	NA	87.1	73.4
1986	10.00	NA	81.5	84.2
1987	12.50	NA	79.0	85.2
1988	12.50	NA	76.9	86.0
1989	12.50	NA	76.2	85.9
1990	15.00	13.5	74.1	87.3
1991	15.00	13.1	72.1	87.3
1992	15.00	13.5	70.7	86.8
1993	15.00	12.1	69.5	85.2
1994	15.00	11.9	69.3	81.6
1995	20.00	8.8	68.5	80.8
1996	20.00	0.2	69.6	78.8
1997	20.00	0.1	69.0	79.2
1999	40.00	4.9	68.2	80.6
2001	55.00	4.7	66.5	79.1
2003	55.00	4.4	67.2	78.3
2005	60.00	4.6	65.6	80.1
2007	60.00	4.4	66.4	79.9
2009	65.00	3.0	67.0	79.9
2011	65.00	2.9	68.7	77.9
2013	70.00	2.8	69.6	79.2
2015	70.00	2.7	69.9	84.5

Table 8. Response rate each wave by sample type and interview type: 1968 to present

		Main PSID					Latino (1990-95)/ Immigrant (1997-present)				
Year	Total	Re-interview	Re-contact	Split-off	Re-contact split-off	Total	Re-interview	Re-contact	Split-off	Re-contact split-off	Total
1968	76.0										
1969	81.4	89.0		60.4		81.4					
1970	95.7	97.0		84.0		95.7					
1971	96.5	97.0		86.0		96.5					
1972	97.8	98.5		88.0		97.8					
1973	97.8	98.5		88.9		97.8					
1974	97.6	98.0		92.5		97.6					
1975	97.8	98.4		88.6		97.8					
1976	97.0	98.0		87.0		97.0					
1977	97.6	98.0		90.3		97.6					
1978	98.0	98.3		90.0		98.0					
1979	97.5	98.2		86.5		97.5					
1980	97.6	98.0		90.0		97.6					
1981	97.7	98.3		85.7		97.7					
1982	98.0	98.8		86.0		98.0					
1983	98.0	98.3		88.3		98.0					
1984	97.7	98.0		92.4		97.7					
1985	97.3	97.7		92.0		97.3					
1986	97.1	97.4		89.5		97.1					
1987	97.2	97.8		82.9		97.2					
1988	97.6	98.0		87.2		97.6					
1989	97.4	97.9		83.3		97.4					
1990	91.7	98.3		89.2		98.0					74.8
1991	96.1	98.2		86.1		97.8	92.3		64.7		90.2
1992	96.0	98.0		85.7		97.6	92.6		66.7		90.4
1993	92.2	95.5	52.1	67.9	47.4	94.7	87.7	na	54.5	na	84.5
1994	na	95.9	na	na	na	na	na	na	na	na	na
1995	na	97.0	na	na	na	na	na	na	na	na	na
1996	na	97.6	na	na	na	na					
1997	na	95.7	na	na	na	na					na
1999	90.7	96.0	54.6	82.3	50.0	93.1	82.8	32.9	65.5	na	66.4
2001	91.7	96.7	52.0	79.7	0.0	93.0	88.5	31.1	61.4	na	76.4
2003	92.7	96.6	57.6	79.6	42.9	93.4	93.9	48.9	58.1	0.0	83.9
2005	93.9	97.4	58.2	81.4	42.9	94.6	93.1	38.5	67.7	na	85.4
2007	93.2	96.4	46.3	85.5	71.4	93.9	92.3	31.7	73.7	66.7	85.1
2009	94.3	97.0	53.5	88.7	53.8	94.7	95.5	44.4	84.6	0.0	89.8
2011	93.3	96.0	38.8	84.9	75.0	93.0	93.4	28.9	77.8	100.0	88.9
2013	91.7	94.9	46.2	81.1	40.0	91.8	95.4	50.0	75.4	0.0	90.8
2015	89.1	92.8	43.3	76.3	0.0	89.1	93.1	46.5	65.6	0.0	81.4

Notes: na= not available; deceased are included in base 1968-1972 and are excluded in all waves 1973-2015. Sample sizes for recontact split-offs for the Latino/Immigrant samples are quite small and therefore the response rates fluctuate substantially.

4.4 Data File Organization

Historically the PSID has released the main interview data in five different data files, and we continue to organize the data this way to facilitate use among established data users.

1. Family file
2. Cross-year individual file
3. Birth history file
4. Marriage history file
5. Parent identification file

Most variables are contained in what is called the family file, including all family level information as well as detailed information about the Head and the Spouse/Partner. The cross-year individual file includes information on every person who was ever in an interviewed family at any point since the study began in 1968. The information on this file is relatively limited; the vast majority of individual level information collected by the PSID is obtained only for the Head and the Spouse/Partner, and this information is on the family file. The childbirth and adoption history file contains details about childbirth and adoption events of eligible people living in a PSID family at the time of the interview in any wave from 1985 through the most recent wave, including retrospective reports of such events. The marriage history file contains details about marriage events of eligible people living in a PSID family at the time of the interview in any wave between 1985 and the most recent wave, including retrospective reports collected in 1985 of all births and adoptions prior to that year. The parent identification file provides information collected about parent-child relationships from various sources since the 1983 wave, and the file consists of identifier variables that link children with their parents. For detailed information on the variables in these files, please see the PDF codebooks, located here.

5. FAMILY FILE TOC

The family file contains one record for each family interviewed in a given year. It includes all family level variables collected in that year, as well as extensive information about the Head and the Spouse/Partner. Therefore, the content of the family file is not restricted to family-level data. The Data Center is the most efficient way to obtain the family data, which creates a customized extract and codebook for the user. The family data files are also available as zipped packages which include the codebook, the entire data file in ASCII format, and SAS, SPSS, and STATA data definition statements (which provide variable names, locations, and variable labels).

5.1 Format, variable names, and positions TOC

The 2015 family data file consists of one data file with 9,048 records and 5,492 variables. The variable names are in the range ER60001-ER65492.

5.2 Coding and generated variables

In this section we describe our coding scheme and the process for constructing generated variables. In general, code ending with “8” (98, 998, or similar depending on the specific variable) represents "don't know", a code ending with “9” (or 99, 999, etc.) represents other missing data or a refusal, and a code of “0” may represent “none” or a further defined inapplicable code. If a variable contains a code value that is neither included in the codebook nor one of the "zero", "eight" or "nine" codes just mentioned, assume missing data for that value; this should be extremely rare.

The most complex generated variables are income, work hours, wages, wealth, and consumption & expenditures. The next three subsections describe the construction of these variables, followed by a fourth subsection which describes the construction of all other generated variables.

5.2.1 Income, work hours, and wages

A comprehensive technical paper was released in 2011 to provide users with an overview of the income and wage data in the 2007 PSID, as well as a detailed description of the methods used to impute missing and unreliable income and employment data. The procedures for 2011 were implemented in an identical fashion in 2015, with several additions. For Spouse, the labor income variables of Bonus, Overtime, Tips, Commission, Additional Job, and Miscellaneous Labor income were added. Variables for Spouse VA Pension and Alimony were also added. These additions mean that we now collect the same labor and transfer income for Spouses that we do for Heads. Imputations for these new variables were performed with the same methodology as for existing labor and transfer variables and a description of the imputation process can be found in Appendix A.

5.2.2 Wealth

The wealth module was first included in 1984. This module was included again in 1989, 1994, 1999, and every wave since then. The question series includes unfolding brackets, and PSID staff members use this and other information to create variables representing the total value of wealth and its major subcomponents. In 2015, there was a change to the W123 question series. Question W124 was dropped and W124a was added to the questionnaire. This question asks if anyone in the family received any large gifts or inheritance in the past two years. In 2013, we only allowed the respondent to indicate that they received this inheritance in one specific year, while in 2015 we allow the respondent to specify up to three years for each inheritance. We still ask for up to three mentions of large gifts/inheritance received.

Information from two sections -- the housing section (A) and the wealth section (W) -- were used to construct the 2015 net worth measures. PSID asks about nine broad wealth categories, including short-term debt:

1. Equity in business (also includes farm), now split into asset and debt components [W11A & W11B, ER65352 & ER65354].

2. Transaction accounts (includes savings accounts, money market funds, certificates of deposit, government savings bonds, and treasury bills) [W28, ER65358].
3. Value of debt aside from mortgage on the main home or vehicle loans, divided into sub-components: credit card debt [W39A, ER65382], student loan debt [W39B1, ER65386], medical bills [W39B2, ER65390], legal bills [W39B3, ER65394], loans from relatives [W39B4, ER65398], and unspecified other debt [W39B7, ER65402].
4. Equity in real estate (second home, land, rental real estate, or money owed on a land contract), now split into asset and debt components [W2A & W2B, ER65362 & ER65364].
5. Equity in stock (includes shares of stock in publicly held corporations, mutual funds, and investment trusts) [W16, ER65368].
6. Equity in vehicle (cars, trucks, a motor home, a trailer, or a boat) [W6, ER65370].
7. Other assets (includes bond funds, cash value in a life insurance policy, a valuable collection for investment purposes, and rights in a trust or estate) [W34, ER65374].
8. Equity in Individual Retirement Accounts [W22, ER65378].
9. Value of home equity (calculated as home value minus remaining mortgage; used in calculation of WEALTH2) [ER65404].

Questions about home equity (primary residence) are asked in section A.

Processing of the data includes three steps: a) imputation of the wealth components (1-8), b) computation of home equity (9), and c) construction of estimates for the total family wealth with and without housing equity. In the processing of the 2015 wealth data we followed the same approach as in prior waves. In particular, a hot-deck imputation technique was used for imputation of the missing data in each wealth component (1-8). Details on home equity imputation, including the numbers of cases imputed within each group, are given in Table 9. For the 228 cases missing at least one component of home equity, the mean value imputed was $83,685.

Table 9. Number of cases by missing data group and imputation category: home equity, 2015

Missing data group	Imputation category								
	A	B	C	D	E	F	G	H	Total
Group 1. House value is not missing; mortgage is missing	30	10	66	0	0	0	0	0	106
Group 2. House value is missing; mortgage is not missing	15	0	0	10	0	0	0	0	25
Group 3. House value is missing; there is no mortgage	26	5	0	0	25	11	0	0	67
Group 4. Both house value and mortgage are missing	5	1	0	0	0	0	12	12	30
Total	76	16	66	10	25	11	12	12	228

There are four rows (groups) in the table corresponding to four patterns of missing data. In Group 1, where mortgage is missing but not housing value, we first attempt to replace the missing mortgage value with a value from the last wave (imputation category A). If this is not possible, a value from the wave prior to the last is used (imputation category B). When this is also not possible, we use an assumed identity, Mortgage=0.6* House Value, to obtain an estimate for the mortgage.

When a housing value is missing but mortgage is not (Group 2) we proceed in the following way. First, using information on the "bracketed" or interval-censored responses, an estimate for the house value is calculated as an average of the lower and upper bracket values available. Then the missing mortgage is obtained as the maximum value of mortgage value reported in the last wave and the bracket estimate (imputation category A). If the last wave information is not available, we use information from the wave prior to the last wave (imputation category B). Finally, if mortgage value was not reported two waves ago then the missing value is imputed as maximum of house value divided by 0.4 and the house value estimate based on the bracket information (imputation category D).

In the case where house value is missing and there is no mortgage, i.e. mortgage value is zero (Group 3), we first try to use information on the house value from the last wave or, if needed, an earlier wave. When neither of these is available the missing home value is imputed in the same way as in Group 2, i.e., the missing value is assigned the maximum of the house value reported in a previous wave and the estimate obtained with help of the bracket questions (category A and B). When house value information is not available in the previous waves then the house value is assigned as an average of the upper bracket and the lower bracket values of the house value. Further, if the bracket information is not available then the median of the reported house values among those who have no mortgage is assigned.

Group 4 consists of cases with both the house value and mortgage missing. First, using information from two earlier waves, the missing house value is treated as in the same way as in Groups 2 and 3, and the missing mortgage is imputed as in the Group1 (imputation category A and B). If information in two preceding waves is not available but the bracket values for house value are available then house value is estimated as an average of the lower and the upper bracket values and home equity is equal to 40% of this estimate, i.e. home equity is equal to 0.4 * (lower bracket + upper bracket)/2 (imputation category G). If the bracket information for the house value is also missing, then home equity is assigned the median value of home equity among all known cases (imputation category H).

5.2.3 Consumption and Expenditures

In response to a growing interest in understanding household consumption choices, the PSID began expanding the number of questions on consumption expenditures in 1999. Four questions for out-of-pocket spending for health care were added: hospital and nursing home care, doctor’s visits, prescription drugs, and insurance premiums. Also included were: assessments of educational expenses, including payment for tuition, books, supplies, room and board; and transportation-related expenses (for up to three owned or leased vehicles) including outlays on vehicles, vehicle loan and lease payments,

down payments on vehicles, vehicle insurance payments, gasoline, repairs and maintenance, parking, bus fares and taxicabs.

Estimates of expenditures on these items using the PSID have been compared with estimates from the Consumer Expenditure survey. In general, estimates from the two data sources align fairly closely, although some differences do exist for certain categories. Details are described in Li, G., R.F. Schoeni, S. Danziger, and K.K. Charles. 2010. New expenditures in the PSID: comparisons with the CE, *Monthly Labor Review*, March, pp. 20-30 and in Andreski, Li, Samancioglu and Schoeni 2014 "Estimates of Annual Consumption Expenditures and Its Major Components in the PSID in Comparison to the CE", American Economic Review: Papers & Proceedings 2014, 104. For information on how these measures compare across studies, please see the Data Comparisons page.

Consumption expenditure questions were further expanded in 2005 to include information on spending on home repairs and maintenance, household furnishings, clothing, trips, vacations and entertainment.

The purpose of the PSID Consumption Expenditure Data is to provide summary consumption expenditure data for families in the 1999-2015 Family Data Files. The summary variables were calculated from responses to the consumption questions collected throughout the Family Interviews. With the release of the 2015 wave of data, all Consumption Expenditure data from 1999-2015 are available on the family-level files.

Consumption expenditures are annualized. If an amount was reported for a period of less than a year, it was inflated by the reciprocal of the fraction of the year that the report covers. If the report was for more than one year, the amount was deflated.

The expenditure variables do not include the value of in-kind government transfers. For example, the value of food stamps received by family units is not included in estimates of food expenditures. Users who wish to include food stamps in calculating food expenditures or total expenditures will want to incorporate information contained in the food stamp variables contained in the family data files on the PSID website.

For some expenditure categories the PSID offers the respondents unfolding brackets when they cannot recall the exact amount of expenditures. The conditional mean expenditure for each bracket was estimated using the exact-number-responses that fall into the particular bracket. The mean estimates were then assigned to households who responded using the option of unfolding brackets.

Even though PSID typically has a very low rate of non-response, an imputation strategy was used to eliminate missing values. Imputation models included a third-order polynomial in age and an unrestricted spline for family size and were fit separately for each expenditure category using ordinary least squares. Imputation may result in negative values due to linear regression model. These negative values are kept in order to preserve population mean consistent with the estimation.

For a listing of available variables in the Consumption Expenditure Module, please see the Consumption Expenditure Content Summary.

5.2.4 All other coded or generated variables

In this subsection we describe all coded or generated variables other than income, work hours, wages, wealth, consumption, and expenditures, which were discussed above.

The PSID hand codes several data items for the Family File. For example, Head's and Spouse's/Partner's occupations and industries, to a maximum of four jobs apiece, are coded, for 2015, using the three-digit codes from the 2000 US Census Occupation and Industry Codes. The information for each job also includes a one-digit reason for job termination, where applicable. Family-owned businesses are coded using a two-digit industry code and the field of endeavor for Head's and Spouse's/Partner's non-academic degrees and certificates is coded for as many as three each. Any education received outside the U.S. is coded for Head, Spouse/Partner, and their parents.

Background items, such as education, are collected only for "new" Heads and Spouses/Partners in a given wave. During processing, we have traditionally "brought forward" background information from previous waves for Heads or Spouses/Partners who are the same persons as in the prior wave. Beginning in the 2013 Wave and continuing for the 2015 Wave, we asked for an education update from our returning Heads/Spouses/Partners. If they reported additional education attainment, then we have updated their education variables in the background section and reported the year of the education update on the Family File (see variables "Year Highest Education Updated", ER64680, for Spouses/Partners, and ER64819, for Heads). In every wave, each set of background variables is preceded by a variable indicating whether data needed to be brought forward. The wave in which the section was most recently asked is indicated by ER65464, for Heads, and ER65465, for Spouses/Partners. Completed Education of Head and Spouse/Partner variables (ER65459 and ER65460, respectively) are generated from the background information.

Family composition and change variables include Family Composition Change (ER60007), Splitoff Indicator (ER60005), Head-Spouse/Partner Sample Status (ER65466), and variables about births to Head, Spouse/Partner, and other family members during the prior calendar year, 2014 (ER65482–ER65485), and during the "off" year, 2013 (ER65486–ER65489). Note that the Splitoff Indicator is only assigned to a family in the year that family first moves out of the main family and forms its own separate household; after that one wave of being a Splitoff, these families receive code values that designate reinterviews. Two other variables concerning Splitoffs are the number of Splitoffs arising from a main family (ER65467) and the Family Interview Number of the main family from which a Splitoff family originated (ER65468).

The PSID produces sets of variables about families sharing the same household: Family ID numbers, relationships, and sizes of up to four other PSID families sharing the HU (ER65469–ER65480),

the Household ID number (ER65481), and the number of persons not included in any PSID family who are sharing the Household Unit (ER60023). The PSID documentation for 1993 and earlier waves has additional information about multiple PSID families sharing the same household (see "Linking Data" in Section I, Part 5, of the 1993 Guide).

The marital status variables consist of Head's current marital status (ER60024), the generated form of marital status comparable with years prior to 1977 (ER65461), change in marital status of Head between waves (ER65462), and couple status of Head (ER65463).

Location variables include PSID/GSA and FIPS state codes (ER60003 and ER60004); Current Region, Beale Rural-Urban code, and Size of the Largest City in the County (ER65451–ER65454). We continue to provide the Beale Rural-Urban Code; however we have updated the frame so that we are using the 2013 classification scheme as published by the USDA. The Beale Rural-Urban Code (ER65453), and Size of Largest City in the County (ER65454) are suppressed to protect the anonymity of our respondents and may be obtained under a restricted data contract (see our website under "Restricted Use", for details: http://simba.isr.umich.edu/restricted/RestrictedUse.aspx). A Metro/Non-Metro Indicator based on the Beale Rural-Urban Code (ER65452) is a public release variable we provide for users' convenience. Finally, we continue to provide two derived variables, from background information: Region where Head (ER65455) or Spouse/Partner Grew Up (ER65457) and Head's (ER65456) and Spouse's/Partner's (ER65458) Geographic Mobility. The codes for the FIPS and PSID/GSA codes are found on our website under State and Foreign Country Codes.

The Census needs standard was generated for the prior calendar year, 2014 (ER65449). Additionally, since the PSID has switched to biennial interviewing, comparable needs standard has also been generated for the "off" year, 2013 (ER65450).

The variable indicating whether a PSID family lives in institutional housing is ER60008. The variable indicating the total number of data records from the Cross-Year Individual File that are associated with a panel family is ER65149.

Sample weights are available as part of the 2015 Family File in ER65492.

The imputed work hours and income variables are found at ER65150–ER65349.

For 2015, an additional set generated variables was created using the new series on Food Security. Using these assessment questions, constructed variables include: a raw score, a scaled score, and a food security category based on the raw score. Missing values were imputed for all items and both a household-level scaled score and category were generated, as well as a child scaled score and category. All food security processing was done following the methodology outlined by the USDA-ERS, in the Guide to Measuring Household Food Security – 2000; Measuring Children's Food Security in U.S. Households, 1995-99; and the U.S. Household Food Security Survey Module: Three-Stage Design, with Screeners, September 2012.

6. CROSS-YEAR INDIVIDUAL FILE TOC

The cross-year individual file contains one record for each individual present in an interviewed family in any survey year.

6.1 What's new for 2015 TOC

In the 2015 questionnaire, the education series for eligible OFUMs (those age 16 years or older in the Family Unit in the prior wave) was modified so that it exactly parallels the series asked of current Heads/Spouses/Partners. Many of these variables have been asked for Heads/Spouses/Partners in prior waves and appear in the background (Section K, for Spouses/Partners, and Section L, for Head, on the Family File). As of 2015, they are also included on the 2015 Individual File because they are now asked of eligible OFUMs as well.

The PSID is striving to keep education information current and thus has re-designed the questionnaire into two basic series. The first series is asked of all newly incoming Heads/Spouses/Partners and eligible OFUMs: KL43/G88a through KL61B/G88M3 (ER34319-ER34348). The second series is asked of all returning Heads/Spouses/Partners and eligible OFUMs, in order to obtain any additional educational attainment they may have received since their last interview. The update series includes questions KL74/G88N through KL84A/G88DD (ER34350-ER34380).

In addition, there are two generated variables for the education series. The first is "Years of Completed Education" (ER34349). For those returning Heads/Spouses/Partners and eligible OFUMs, we calculate their "Years of Completed Education" from the update series. If the calculated level of completed education derived from the update series is higher than previously reported, then we update all the corresponding variables in the baseline series KL43/G88a through KL61B/G88M3 with this newly acquired information. In addition to updating the baseline series, we also update the variable "Year Highest Education Updated" (ER34318) with the year the baseline series was updated. Therefore, the baseline series for Heads/Spouses/Partners and eligible OFUMs always has the most up-to-date information.

The other new variable added to the Individual File in 2015 is an indicator whether an OFUM reported living in the Family Unit is the same-sex partner of Head (ER34304).

6.1.1 New generated variables

In 2015, we continue to provide the generated variable, ER34393: "Whether Medicare Number Given". This variable provides a summary for those who were eligible to be asked for a Medicare number.

Longitudinal and cross-sectional weights continue to be included. For 2015, they are ER34413: "Core/Imm Individual Longitudinal WT 15" and ER34414: Core/Imm Individual Cross-Section WT 15".

Finally, we continue to have ER34318: "Year Highest Education Updated".

6.1.2 Other additions

For 2015, children were eligible for the Transition to Adulthood Supplement (TAS-2015) interview if they had been part of the 1997 Child Development Supplement, met age requirements, and were part of a PSID family interviewed in 2015. Variables indicating 2015 eligibility (ER34407) and the result of the interview attempt (ER34408) are part of the 1968-2015 Individual Data File.

One other supplementary study, the Wellbeing and Daily Life study (WB-2016), a web-based survey, also has eligibility and result variables on the 2015 Individual File: WB-2016 Eligibility, ER34409, and WB-2016 Result, ER34410.

6.2 Data Characteristics TOC

This section provides a brief overview of how the file is created, how the variables are generated and named, as well as the documentation and supporting information that coincides with the release of the data.

6.2.1 Files and format

The 1968-2015 Individual data consists of one data file with 77,223 records and 1,936 variables. The data are merged across all waves of the study; that is, they include person information collected from 1968 through 2015. Each person ever in an interviewed family, even for just one wave, has his or her own data record. Consequently, the file contains records for both 2015 response and 2015 non-response individuals.

6.2.2 Variable names, positions, and generated variables

The 1968-2015 Individual data file consists of yearly items (e.g., Sequence Number, Relationship to Head, Family Identification Number) and a set of summary or cross-year variables with up-to-date values (ER32001-ER32051, Sex of Individual, ER32000).

6.2.3 Coded and generated variables

The summary variables fall into three groups. ER31990-ER31997 are used for sampling error and weights calculations; ER32001-ER32008 are true cross-year indicators derived from values in each individual's data record; and ER32009-ER32051 are summaries from the Family History files (available as zip files and, for the first time in 2013, through the Data Center). Other generated items include variables designating the originating family and move-out date for splitoffs for every wave from 1969 to 2015 (2015: ER34402-ER34403) and income summaries from 1968 to 1993.

7. CHILDBIRTH AND ADOPTION HISTORY FILE, 1985 – 2015 TOC

7.1 Overview

The 1985-2015 Childbirth and Adoption History File contains details about childbirth and adoption events of eligible people living in a PSID family at the time of the interview in any wave from 1985 through 2015.

Each set of records for a specified individual contains all known cumulative data about the timing and circumstances of his or her childbirth and adoption experience up to and including 2015, or those waves during that period when the individual was in a responding family unit. If an individual has never had any children, one record indicates that report. Similarly, if the individual never adopted any children, one record contains that information.

Records contain identifiers for the individual and his or her children; for both parent and child; geographic identifiers about the place of birth; the child's birth order, birth weight, birth length, race, and date of death; the year of most recent report and number of births or adoptions for the parent. Several significant changes have been made since 1985. Beginning with the 2005 wave, we also asked the child's Hispanic ethnicity (CAH27). In 2013, we introduced a series of questions about the pregnancy intentions, pregnancy, and delivery. Most of these questions only apply to childbirth records for newborns.

Also, we have maintained ethnicity indicators on the cumulative file (CAH32-CAH34) but apply to records obtained between years 1985-2011. In addition, the set of race variables (CAH28–CAH30) have been modified to be consistent with current definitions used by the U.S. Census Bureau. In 2005, the code frame for race was:

1) White
2) Black
3) Native American
4) Asian/Pacific Islander
5) Latino Origin or Descent
6) Color Besides Black or White
7) Other

In 2007 the code frame was changed to:

1) White
2) Black, African-American, or Negro
3) American Indian or Alaskan Native
4) Asian
5) Native Hawaiian or Pacific Islander
7) Other

That is, the "color besides black or white" code was dropped, the "Asian/Pacific Islander" code was split into "Asian" and "Native Hawaiian or Pacific Islander", and the 'Latino Origin or Descent' code was became a separate variable asking specifically about Hispanic background.

In order to maintain the cumulative file we did two types of recoding:

(a) For those children in the 1997-2005 records who had a race mention of 5, Latino Origin or Descent, we:

- Recoded the Hispanic ethnicity question (CAH27) to a new value of 6 (Latino, no further information), and
- Recoded their race questions (CAH28-30) to 7 (Other)

(b) In the 2013 CAI interviewing instrument, Native Hawaiian and Pacific Islander were two separate categories. To maintain consistency with the previously collected records, 2013 records coded as either Native Hawaiian or Pacific Islander were combined into Code 5, as in the 2007 code frame.

The 1985-2015 Childbirth and Adoption File can be linked to the 1968-2015 Individual File. Data users who want only some of the detail of the childbirth data will find childbirth and adoption history information summarized on Public Release versions of the PSID Individual and Family files. Individual-file variables include number of births, birth dates of most children, identifiers of mother and father, whether the mother was married at the time the individual was born, and birth order of the individual. Family variables include the number of births in the prior calendar year to the Head, Spouse, Partner and Other Family Unit Members (OFUMs).

7.2 Individuals for whom the data are available TOC

The childbirth and adoption history data were collected for individuals in responding families who were of childbearing age, i.e., individuals meeting the age requirements who had values in the range of 1-20 for the "Sequence Number" variable in a given wave. In waves when individuals were non-response or in an institution, no information was collected.

The types of individuals for whom childbirth and adoption information was asked and the detail gathered about their history differed somewhat during the collection period from 1985 through 2015:

- 1985 followed one pattern, and 1986-2015 followed another pattern.
- Beginning in 1997, questions were added for births and adoptions reported during that wave.

To keep respondent burden to a minimum and data quality high, different question sequences about these events have been used for PSID individuals depending on their circumstances. Childbirth and adoption history information was gathered as described below:

(a) In the 1985 wave, a complete retrospective birth history was asked for a Head, Spouse, or Partner of any age;

(b) From 1986 on:

(i) birth history was updated for changes since the prior calendar year for a female Head, Spouse, or Partner aged 44 or younger providing she had been either a Head, Spouse, or Partner in the prior wave's interview;

(ii) birth history was also updated for changes since the prior calendar year for a male Head of any age who was also a Head in the prior wave's interview, unless he was married to a Spouse aged 45 or older who had also been his Spouse in the prior wave's interview, (in which case no childbirth information was asked);

(iii) a complete retrospective birth history was reported for a New Head, New Spouse, or New Partner of any age; and

(c) in all waves from 1985 through 2011, a complete retrospective birth history was reported for an Other Family Unit Member (OFUM) aged 12-44 at the time of the interview. Starting in 2013, the minimum age requirement for these questions was raised from 12 to 15.

In the 1992 wave, the PSID undertook a pilot effort to recontact former respondents who had attrited from the study and persuade some of them to rejoin. Additional information regarding the 1992 recontact samples is discussed in the 1992 PSID Documentation, pp. 1-3; but briefly, four types of recontact samples were selected for inclusion in this round of interviewing. They differed in the detail gathered about their childbirth and adoption history.

(a) 1992 Reinterview recontact families who were last interviewed during the 1990 wave, but attrited in 1991.

(b) 1992 Splitoff recontacts who were sample members who moved out of a responding 1991 family, but who were not interviewed themselves in 1991.

(c) 1992 Sample recontacts who were designated as members of original 1968 Panel families who were last interviewed at some time between 1969 and 1989.

(d) 1992 Latino recontacts who were families in the original Latino National Political Survey sample, but either refused or were never contacted by the PSID during the 1990 wave when the Latino sample was added to the study.

Splitoff, Sample, and Latino recontacts (the last three types described above), like all other New Heads/Spouses/Partners, were asked complete retrospective birth and adoption histories. The birth and adoption histories of Reinterview recontacts (the first type above) were updated for changes since January 1991. Since this group of people was interviewed in 1990, but not 1991, information was lost for births or adoptions occurring between the 1990 interview and January of 1991. The unaccounted-for time varies from a month or two up to a maximum of nine to ten months. Reinterview recontacts can be identified on the cross-year Individual Files by data values of 2 or 3 for "1992 Follow Status" (ER30799).

In 1993, 1994, and from 1997 on, the PSID also recontacted attritors, but these individuals were asked to complete retrospective birth and adoption histories.

Starting in 2013, the way childbirth and adoption histories were collected changed significantly. Before 2013, information was collected for each eligible person in categories (a)-(c) about their biological and adopted children. In 2013, we asked the first eligible person about their children and then asked who the other parent was of that child. During processing we copied the childbirth and adoption information reported for one individual to the other as per the ‘other parent’ report.

Adoption history data were gathered in a fashion similar to childbirth history, except that information was collected for PSID family-unit Heads, Spouses and Partners, but not for OFUMs (category (e) above).

A number of complexities in the overall study design present special challenges for collecting and processing the childbirth and adoption history data:

(a) In any wave of the PSID, some family members appear in the study for the first time, although most are people who have been participating for years.

(b) From one wave to the next, a PSID individual can enter or leave eligibility for being asked marital or childbirth histories by passing the threshold ages for these questions. For reports from 1985-2011, the entry age for eligibility is 12 and the exit threshold for eligibility was 45 for many persons. As of 2013, the entry age for eligibility is 15 and the exit threshold for eligibility is 45.

(c) A PSID individual can change his or her relationship to Head from one wave to the next and this can affect whether the childbirth and adoption history is self-reported or proxy-reported by a parent or by some other relative.

(d) From one wave to the next, the range of demographic events asked about a given individual can expand--information about adoptions is gathered for Heads, Spouses, and Partners, but not for OFUMs.

(e) A PSID individual can become non-response, after which the childbirth and adoption history is not updated.

(f) While both Heads and Spouses/Partners were interviewed in 1985 (each giving a self-report), only one person (usually the Head) has been the respondent in each year since then.

7.3 Background for the childbirth and adoption history files TOC

The 1985-2015 Childbirth and Adoption History File originated with the 1985 collection of comprehensive, retrospective questions about a number of demographic events, including childbirth, adoption, marriage, separation, divorce and substitute parenting. In each wave from 1986 through the present, these histories, with the exception of substitute parenting, were updated for eligible individuals.

The program participation and health care questions include whether prenatal care was received and where it was received, whether the mother had private health insurance, and whether she received Medicaid, WIC, food stamps, free government food, ADC/AFDC, or other public assistance. These questions were collected about children reported in the 1985 interview if the parent was a female Head, Spouse, or Partner in 1985 and the child was born between January, 1979 and the time of the 1985 interview. Both the substitute parenting and the program participation/health care sequences were discontinued after the initial retrospective in 1985.

Beginning in 1986, we decided to release the demographic history data annually as two separate files: the Childbirth and Adoption History File and the Marriage History File. These files are cumulative, and so their size increases each year as more events happen and additional people become eligible.

Data on childbirth and adoption are assembled into one file to facilitate analysis that may treat births and adoptions in the same framework. A primary function of the childbirth and adoption

information is to clarify the relationships between individuals in the PSID. This information helps distinguish step relations from biological and adoptive ties.

7.4 How to obtain a file and Whom to Contact About Questions TOC

The 1985-2015 Childbirth and Adoption File is available in the Data Center, as well as in .zip format. If you have questions that are not answered by this documentation, you can contact PSID staff through our website.

7.5 Questionnaire detail TOC

The flow of the PSID questionnaire is complex. In addition, the types of individuals asked for history information and the detail gathered about their history may change over time.

Data users may find it helpful to actually see the questionnaires. The 1986-2011 sequences are identical to each other, with the addition, beginning in 1997, of questions about birth location, race and ethnicity. And beginning in 2005, a question about the child's Hispanic ethnicity was added. In 2013, an additional set of 75 variables were added to the Childbirth and Adoption History (CAH) file, with the majority focusing on pregnancy, prenatal care, aspects of the delivery and infant care of the child. Most of these questions apply to childbirth records only and more specifically only to reports of newborns.

PDF format versions of the 1968-2015 main questionnaires are also available on the documentation page of our website. In the more recent waves, they contain the complete series of questions for Head/Spouse/Partner/OFUM marriage and birth/adoption history.

7.6 Structure of the File TOC

7.6.1 Number of Records

The 1985-2015 Childbirth and Adoption History File contains a total of 131,424 records, with 96,498 childbirth records and 34,926 adoption records. The file has a one-record-per-event general structure. Each record contains information for a childbirth or an adoption event. For example, if an individual has one biological child and one adopted child, the file contains one childbirth record and one adoption record for this individual. The same parent may appear on both childbirth and adoption records.

Multiple records for a given parent can result from an individual having (or adopting) more than one child. Although the parent remains the same in such circumstances, the child differs from one record to the next. An individual who has his or her own children may also be an adoptive parent. The maximum number of childbirth records for a specific individual is 18 for biological children, and six for adoption records.

A given child can also have multiple records on the file, if the birth or adoption was reported for two or more individuals. Since a child has two biological parents, the same birth can produce two records on the file, one for the father as parent, and the other for the mother. The same applies to the adoption history data, and a child could have as many as four records on the file if he or she was both born and adopted within the study, i.e., was adopted by sample relatives.

7.6.2 Sort Order of the File

The 1985-2015 Childbirth and Adoption File is sorted, in ascending order, by "1968 Interview Number of Parent" (CAH3) and "Person Number of Parent" (CAH4), "Type of Record" (CAH2), birth order (CAH9), birth year and month for the child (CAH15 and CAH13), and "Person Number of Child" (CAH11). The childbirth records for an individual are followed by his or her adoption records. The record for an individual's oldest child is followed by that for the second oldest child, etc. All records for the first eligible member of a 1968 PSID family are followed by all records for the next eligible member in the same family of origin. When all of the childbirth and adoption records for all eligible members in the first family are exhausted, records for eligible members in the second family follow.

7.7 Idiosyncrasies, Data Cleaning and Variable Detail TOC

Several aspects of the Childbirth and Adoption History merit particular attention. This section discusses what they are and how to handle them.

7.7.1 How to Identify Individuals Who Have Never Had or Adopted a Child

One caution, particularly relevant to event-history analysis, concerns the records for individuals who have never had or adopted any children. Such a person has a data record denying the event. If he or she has neither had nor adopted any children, the file has two records, one for each type of event. On these records, codes indicating "Inapplicable" (9s) are padded in the fields for details about the child, with the exception of Child's 1968 Interview Number and Child's Person Number (CAH10 and CAH11); both of these variables are padded with zeroes.

7.7.2 How to Identify Births/Adoptions that Were Not Ascertained

Persons who may or may not have had or adopted children but for whom the PSID has been unable to determine anything relating to that particular type of parental experience also have one record for each demographic phenomenon on the file. On these records, the "Number of Births/Adoptions" variable (CAH106) has a value of 98, although this value is not unique to such individuals. Missing data codes (8s or 98s) are padded in all the fields for that record, with the exception of Child 1968 ID (CAH10) and Child Person Number (CAH11). These two variables contain values of 9s, which do uniquely identify this sort of record.

7.7.3 Treatment of Individuals Who Become Non-response

The Childbirth and Adoption History File is cumulative; that is, all individuals who have ever been eligible for the childbirth or adoption history question sequences since they were first begun in 1985 have at least one record on the file. Thus, each new version is current through the most recent wave for individuals in responding families, but the data are only up to date through the last year that non-response individuals were living in a responding family.

The Childbirth and Adoption History File is current through 2015 for those in a responding PSID family at the time of the 2015 interview and who are otherwise eligible for the childbirth and/or adoption history questions. For those who were non-response in the 2015 wave or who are no longer eligible for the questions, the history is current through the last year they were in an interviewed family unit and eligible. For example, if an individual became non-response for the 1988 wave and has not returned to a PSID family, his or her childbirth history (and adoption history, if applicable) is current only through 1987. Similarly, if an OFUM who has remained in a responding family is now 47 years old, his or her childbirth history has not been updated in the last few waves, since OFUMs' childbirth information is not collected once they achieve 45 years of age. The variable indicating recency of an individual's childbirth or adoption reports is CAH102.

7.7.4 Location Data About the Child's Place of Birth

Beginning in the 1997 wave, information about a child's place of birth was added to the child-specific questions. This was asked only for biological children reported from 1997 forward if they were born since January 1st of the preceding wave, but the birth year restriction was waived for adoption reports. The birth location data comprise two variables using FIPS state and county codes. Foreign births are coded with the PSID foreign country code scheme, in which the state variable contains values of zero and the county variable indicates the specific foreign country.

Because of the PSID's policy on respondent confidentiality, only the variable for the state in which the birth occurred is included on the Childbirth and Adoption History File. The county variable is classified as restricted and suppressed in the public release file. Access to sensitive data must be obtained by a special request and confidential data use contract.

7.7.5 Treatment of Incomplete or Inconsistent Information

We have tried very hard to assure access to all available information while also recording occurrences of missing data or unclear identification of children. In some situations, however, a parent was reported to have had biological or adopted children, but details about some or all of the children were not reported. PSID staff can and do assign an identifier to such a child, as it is clear that the child has never been part of the study.

Sometimes the same child is reported in more than one wave. In such cases, the initial report was chosen as the source for the child's sex, birth date, birth weight, etc., unless the information was not ascertained. In that event, a succeeding year's report was used on the principle that known information is better than missing information. However, values for the child's current whereabouts (CAH24), and death date (CAH25-CAH26) if applicable, are always picked up from the most recent report. The variable indicating the most recent wave in which the child was specifically mentioned, (CAH103), shows in which wave that happened.

If a child had ever been in the study and his or her birth or adoption records contained missing information about sex or birth date, values from the cross-year Individual File were used. Additionally,

parental reports of a child's sex or birth dates were cross-checked for discrepancies, and Individual File data were consulted to help us resolve the differences where possible. Once birth dates were known, we checked the spacing of births to the same mother. All cases where successive children were born less than ten months apart were checked for possible coding, reporting or transcription errors in birth dates.

Aside from multiple births, a few cases remain where the children are nearer than ten months apart in age. Most of these are legitimate, but in some cases we know the dates are incorrect and we are unable to resolve them.

Parent and child birth dates were compared in order to check births occurring to a parent under 13 years old, and to mothers aged 50 or older. Twenty-two cases of very young birth parents and four cases of very old birth mothers remain on the file. Most of the children have never been in the study (their Person Numbers have values of 800-995), so we are unable to consult another source for satisfactory confirmation. The parental birth dates are consistent with the cross-year Individual File.

However, birth dates of all children ever in the study were not universally checked against the Individual File. Some discrepancies with the Individual File may still be present.

On a related note, a parent's birth date is copied from the current wave of the Individual File when his or her births first appear on the cumulative Childbirth and Adoption History File. This birth date is not updated in later years for the initial record(s). If a new child is subsequently reported for the parent, then his or her birth date from that later wave is used in construction of the new record. Thus, birth dates for the same parent may disagree across children if the reports were not collected in the same wave. These discrepancies were cleaned to some extent, but only as a by-product of other cleaning activities.

Attempting birth date consistency with the Individual File is made difficult because of parents' and children's varying years of participation in the study. In the longer term, we hope to clean these dates, but for the present we advise analysts to use the parent's birth date or age variables from the most recent year of Individual File data for which he or she is present in the study.

The sex and birth date checks resulted in many corrections to both the Childbirth and Adoption History File and the cross-year Individual File. As an added benefit, we were also able to find and correct some spurious child identifiers.

Other data cleaning steps ensured that each child had no more than one birth mother and father. In a few cases, birth parents also claimed that they had adopted the child. These reports were verified against information in interviewer thumbnail sketches and marginal notes for corroboration.

Child identifiers were compared to cross-year individual data and to the 1985-2015 Marriage History File to confirm that no spurious cases of intergenerational incest occur.

Our final checks assured that all individuals who had ever qualified for childbirth or adoption questions had records of the appropriate type on the file, and that individuals who had never qualified for a specific type did not.

7.7.6 Who has cross-year information?

Please keep in mind another PSID intricacy when matching across files: while all parents were present in a PSID family, some children identified in the birth and adoption histories have never been present in a PSID family unit during the years the study has been in progress; these children have values for "Person Number of Child" in the range 800-995. Consequently, each parent has been in a PSID family unit and has a record on the 1968-2015 Individual File, but his or her child may or may not.

7.7.8 Birth order and number of children

Children of a specified parent are ordered from the oldest to the youngest based on their birth dates. If no birth dates contain missing data, then each child is rank ordered from the earliest to the most recent date. If one or more birth dates contain missing data, then missing data are assigned to the order variable (CAH9) for all births. The birth order variable applies only to childbirth records.

Occasionally it is possible to assign birth order to some of the children, even though others may have missing information for birth dates. This can happen if an individual's retrospective history contains non-missing information about the number of existing children, although their birth dates are missing, but in a subsequent year the individual reports an update about a new birth. For example, a new Head moves into the study. At that time we receive a report about two children living with his ex-Spouse, but we do not obtain information about their birth dates. The children are assigned values of 98 for birth order (CAH9) because we don't know which one is older. In the next wave, the Head and Spouse have a new baby. This brings the total number of children to three, and we know with certainty that the new baby is his third oldest child.

In cases with known birth years for all children, unknown birth months can cause order for a pair of children to be assigned missing data values if they are born in the same year but with no evidence of twinhood. Updating the number of an individual's children can have a negative effect on the number of children (CAH106). If the number and order of all prior children is known but we have not ascertained whether he or she has had any additional children, then the order values for the known children remain as they are but missing data values must be assigned to the variable for total number of children. The 2015 file has 82 parents who fall into this category.

7.7.9 Adoption Dates

The adoption date was not collected as part of the adoption history data. The cross-year Individual Files do, however, record move-in dates for adopted children coming to live in responding PSID families.

7.8 Linking Records TOC

7.8.1 Using the Childbirth and Adoption History File with the Individual File

The Childbirth and Adoption History File is designed to be linked with the Individual File for analysis purposes. The Childbirth and Adoption History File has only a modest amount of information about the parent and his or her child. Data users will no doubt want to access the much greater volume of data available for these individuals on the Family and Individual Files. Those files can provide abundant

information for many individuals dating back to 1968 when the PSID began, although for some, the span of available data is more limited or nonexistent.

When matching the 1985-2015 Childbirth and Adoption History File to individual data, only the 1968-2015 Individual File should be used. During file merging and cleaning, a number of unique individual identifiers were corrected. Special care was taken to ensure perfect correspondence in individual identifiers between this file, the 1985-2015 Marriage History File, and the 1968-2015 Individual File.

Because of the corrections, do not attempt to match this file with any other PSID data file or a subset derived from it using these unique individual identifiers. Non-matches in individual records definitely will occur if any other file besides the above-named is used.

Data processing is required to link records between these two files. To achieve linkages, one must match on the parent's unique individual-specific identifier. This unique identifier is a combination of two variables: "1968 Family Interview Number" (CAH3) and "Person Number" (CAH4). The corresponding variables for these identifiers on the cross-year Individual File are ER30001 and ER30002. Care must be taken with regard to the proper files to use, the choice of individuals on the Childbirth and Adoption File for whom matches are attempted, and the years for which data are available.

Parents and children vary substantially in terms of which years they have been present in PSID family units over the course of the study. This affects the availability of data for them on the main files because valid information is obtainable on that file only in the years that an individual is present in a PSID family unit ("present" means living in the family unit or having left it to enter an institution). For more details about PSID tracking procedures and classification of people into family units, see the discussion in Chapter 8 on "Family Composition Change," in The Panel Study of Income Dynamics: A User's Guide, by Martha Hill (Sage Publications, 1992). First there is the matter of whether any record exists for an individual. If a record does exist, then the question is in which years of the study are data available for that individual and his or her family.

If a person, either parent or child, has a record on the 1968-2015 Individual File, but less than the full range (39 waves) of data in that record, variables in the years when he or she was not present in a PSID family unit are, for the most part, filled with zeros. In addition, the annual individual-level variable "Type of Individual Data Record" in those years indicates that he or she is non-response.

All eligible individuals have records on the 1968-2015 Individual File because they were present in a PSID family unit at some point during that time period. However, many children do not have records on that file, since indeed they have never been present in a PSID family at any time during the course of the study. Children who have been present in a PSID family unit at some time since the study began have records on the 1968-2015 Individual File. Values for their Person Numbers are in the range 001-399. Children who have never been present have Person Number values in the range 800-995.

Even though all parents have records on the 1968-2015 Individual File, that file does not necessarily contain data for all of them for all years of the study. Some parents first entered the study in, e.g., 1985, and thus only have data since that year. Others have logged more than thirty years of inclusion in the study. Similarly, there is considerable variation among children regarding which years, if any, they were included in the study.

For those persons with records on both the Individual File and the Childbirth and Adoption History File, linkages rely on a match of individual-specific identifier variables that appear on both files. As noted earlier, the unique identifier involves two variables: "1968 Family Interview Number" and "Person Number". The corresponding set of variables on the two files must match to properly link an individual's records from the two sources. The variable names for these two variables are ER30001 and ER30002 on the Individual File. On the Childbirth and Adoption File, they are CAH3 and CAH4 for the parent and CAH10 and CAH11 for the child. Note that such linkages involve a one-to-many-match. One record on the Individual File may have more than one matching record on the Childbirth and Adoption History File because the specified individual has multiple children or has both childbirth and adoption records.

7.8.2 Using the Childbirth and Adoption History File with Other Files TOC

Some analysts may be interested in linking information from different records on the Childbirth and Adoption History File or linking information from records on different demographic files. For instance, access to all childbirth records for an individual is needed to identify full and half siblings; that is, biological children of the same parent. To determine, for example, ages of children of single parents based on marital spells data, one would need to merge records on the Marriage History and CAH files. To make links such as these, one must match on the unique individual-specific identifier, which is a combination of two variables -- "1968 Family Interview Number" and "Person Number" (MH2 and MH3 for the person designated as the individual on the 1985-2015 Marriage History File; CAH3 and CAH4 for the person designated as the parent on the 1985-2015 Childbirth and Adoption History File).

7.9 Childbirth Information Available on the Individual and Family Files TOC

Some of the information provided on the Childbirth and Adoption History Files is also available on the final release versions of the cross-year Individual Files. In addition, the Individual Files contain some detail relating to fertility issues that the Childbirth and Adoption History Files do not, and they provide information involving a combination of detail about marriage and fertility that would otherwise require data management.

7.10 Codebook TOC

The item-by-item descriptions for all of the variables in the Childbirth and Adoption History File can be found in the codebook. Unweighted frequencies were calculated for each variable.

8. MARRIAGE HISTORY FILE TOC

8.1 Overview of the 1985-2015 Marriage History File

The marriage history data were collected about individuals of marriage-eligible age in responding PSID families, i.e., those with values of 1-20 for the "Sequence Number" variable in a given wave. In waves when individuals were non-response or in an institution, no information was collected about them. The types of individuals asked marriage history information and the detail gathered about their history differed over the waves from 1985 through 2015; 1985 followed one pattern and 1986 through 2015 followed another.

To keep respondent burden to a minimum and data quality high, different question sequences about these events have been used for PSID individuals depending on their circumstances. Marriage history information was gathered as described below:

(a) in the 1985 wave, a complete retrospective marriage history was asked of a Head, Spouse, or Partner of any age;

(b) in all succeeding waves, marriage history was updated for changes since the beginning of the prior calendar year for a Head, Spouse, or Partner of any age who was also a Head, Spouse, or Partner in the prior wave's interview;

(c) in succeeding waves, details about first and current or most recent marriages were asked for a New Head, New Spouse, or New Partner of any age; and

(d) in all waves from 1985 through the present, details about first and current or most recent marriages were asked for an Other Family Unit Member (OFUM) aged 12-44 at the time of the interview. In 2013, OFUM age eligibility was changed to those aged 15-44; however marital status for OFUMS was still obtained for those aged 12-44 therefore we generated denial records for those aged 12-14 for those OFUMs whose marital status was reported as never married in the Coverscreen portion of the CAI interview

These latter two groups, although initially asked about only first and last marriages, may have additional marriage records on the file if those marriages occurred while the individual was in a responding family.

A number of complexities in the overall study design present special challenges for collecting and processing the demographic history data:

(a) In any wave of the PSID, some family members appear in the study for the first time, whereas most are people who have been participating for years.

(b) From one wave to the next, a PSID individual can enter or leave eligibility for being asked marital or childbirth histories by passing the threshold ages for these questions. For example, the entry age for eligibility is 12 and, for family members other than Head, Spouse, or Partner, the exit threshold for eligibility is 45.

(c) A PSID individual can change his or her relationship to Head from one wave to the next and this can affect whether the demographic event-history information is self-reported or proxy-reported by a parent or by some other relative.

(d) From one wave to the next, the range of demographic events asked about a given individual can expand or contract. For example, information about adoptions is gathered for Heads, Spouses, and Partners but not for other family members.

(e) A PSID individual can become non-response, after which time demographic event history information is not updated.

(f) While both Heads and Spouses/Partners were interviewed in 1985, only one person (usually the Head) has been the respondent in each year since then.

The marital history data of the Latino sample are also included in this file.

For more information on the 1992-1997 interview year recontact efforts, please see section 7.2 'Individuals for whom the data are available'.

8.2 Background for the Marriage History Files TOC

The 1985-2015 Marriage History File originated with the 1985 collection of comprehensive, retrospective questions about a number of demographic events, including childbirth, adoption, marriage, separation, divorce and substitute parenting. In each wave from 1986 through the present, these histories, excepting substitute parenting, were updated for eligible individuals.

All the retrospective data collected in 1985 on these demographic phenomena were included in the 1985 Ego-Alter File. This file was mostly of interest for substitute parenting information and for child-specific information on public program participation and health care surrounding a birth. These sets of questions were discontinued after the initial retrospective in 1985. Beginning in 1986, due to the inherent complexities of the Ego-Alter File collection and data dissemination, we decided to replace the Ego-Alter File and release the demographic history data annually as two separate files: the Childbirth and Adoption History File and the Marriage History File. These files are cumulative and so their size increases each year as more events happen and additional people become eligible.

8.3 How to Obtain the File and Whom to Contact About Questions TOC

The 1985-2015 Marriage History File is available in the Data Center, as well as in .zip format. If you have questions that are not answered by this documentation, you can contact PSID staff through our website or at PSIDhelp@umich.edu.

8.4 Questionnaire detail TOC

The flow of the PSID questionnaire is complex. As described above in 8.1, the types of individuals asked history information and the detail gathered about their history have changed over time.

Data users may find it helpful to actually see the questionnaires. The 1986-2015 sequences about marriages are identical to each other. PDF format versions of the 1968-2015 main questionnaires are also available on our website. In the more recent waves, they contain the complete series of questions for

Head/Spouse/Partner/OFUM marriage and birth/adoption history however for some earlier years where supplementary forms used to collect details about childbirth and adoptions, or for OFUMs' marriages and childbirths, those supplements are not available on the website as of this writing.

8.5 Structure of the file TOC

8.5.1 Number of Records

The 1985-2015 Marriage History File contains a total of 58,372 records. This file has a one-record-per-marriage general structure. Each record contains information for a specified marriage for an individual or information that indicates the individual has no marriage data. Information for an individual is current as of the most recent wave that marriage history was collected for him or her.

Multiple records for a given individual result from an individual having more than one marriage. Although the individual remains the same in such circumstances, the spouse differs from one record to the next. The maximum number of marriage records for a given individual is eight on the 1985-2015 Marriage History File. A few multiple records for a given spouse also exist. This occurs when an individual has remarried the same person. In situations where two individuals were married to each other twice and were both present in a responding family unit, the file contains four records for this pair, two records for each of the two individuals.

8.5.2 Sort Order of the File

The 1985-2015 Marriage History File is sorted, in ascending order, by "1968 Interview Number of Individual" (MH2), "Person Number of Individual" (MH3), and "Order of This Marriage" (MH9). Details for an individual's first marriage are followed by those for his or her second, third, etc., or the most recent marriage. As noted previously, complete marriage histories were gathered for Heads, Spouses and Partners in 1985, but information on only first and most recent marriages was initially collected for New Heads, Spouses, and Partners in 1986 through 2015 and OFUMs in any wave from 1985 forward.

All records for the first eligible member of a 1968 PSID family are followed by those for the next eligible member in the same family of origin. When all of the records for all eligible members in the first family are exhausted, records for eligible members in the second family follow.

8.5.3 Variables on the File

The 1985-2015 Marriage History File contains twenty variables, which can be categorized into those relevant to the individual, those specific to his or her spouse, those in regard to the marriage in question, and some aggregate information about the marriage history for the individual. Please see the codebook for the full listing of these variables, along with the code frame, and frequencies in the sample.

8.6 Idiosyncrasies, File Cleaning and Variable Detail TOC

Several aspects of the 1985-2015 Marriage History File merit particular attention. This section discusses what they are and how to handle them.

8.7 How to Identify Individuals Who Were Never Married TOC

One caution, particularly relevant to event-history analysis, concerns the records for individuals who have never married. The file has one record for each such person. On these records, the "Number of Marriages" variable (MH18) has a value of zero. Codes indicating "Inapplicable" (9s) are padded in the fields for marriage details, with the exception of Spouse ID (MH7) and Spouse Person Number (MH8); both of these variables have values of zero.

8.8 How to Identify Individuals For Whom No Marriage Data Were Ascertained TOC

Persons who may or may not have married but for whom the PSID has been unable to determine anything relating to his or her marriage situation, not even marital status, also have one record on this file. On this type of record, the "Number of Marriages" variable (MH18) has a value of 98, although this value is not unique to such individuals. Missing data codes (8s or 98s) are padded in all the fields for that record, with the exception of Spouse 1968 ID (MH7) and Spouse Person Number (MH8). These two variables contain values of 9s, which do uniquely identify this sort of record.

8.9 Treatment of Individuals Who Become Non-response or Non-Eligible TOC

The Marriage History File is cumulative; that is, all individuals who have ever been eligible for the marriage history question sequences since it was first begun in 1985 have at least one record on the file. Thus, each new version is current through the most recent wave for individuals in responding families but the data are up to date only through the last year that non-response individuals were living in a responding family.

The Marriage History File is current through 2015 for those in a responding PSID family at the time of the 2015 interview and who are otherwise eligible for marriage history questions. For those who were non-response in the 2015 wave or who are no longer eligible for the questions, the history is current through the last year they were in an interviewed family unit and eligible. For example, if an individual became non-response for the 1988 wave and has not returned to a PSID family, his or her marriage history is current only through 1987. Similarly, if an OFUM who has remained in a responding family is now 49 years old, his or her marriage history has not been updated in the last few waves, since OFUMs' marriage information is not collected once they achieve 45 years of age. The variable indicating recency of an individual's marriage reports is MH17.

8.10 Treatment of Incomplete or Inconsistent Information TOC

We have tried very hard to assure access to all available information while also recording occurrences of missing data or unclear identification of spouses. In some situations, the individual was reported to have married, i.e., his or her marital status is known to be divorced, widowed, separated, or currently married, but details about the marriage or the identification of the spouse were not reported. PSID staff can and do assign an identifier to such a spouse, as it is clear that the spouse has never been part of the study.

Often the same event (e.g., a divorce) is reported in more than one successive interview. In such cases, the initial report is chosen as the source for the associated date of the event (e.g., month and year of

a divorce) unless the date was not ascertained. In that event, the succeeding year's reported date was used on the principle that known dates are better than missing dates.

Individuals from whom we have reports of their marriages to each other may disagree on the status. This seeming inconsistency can be legitimate if the timing of the spouses' reports differs. The variable indicating the wave in which the marriage history was most recently updated is MH17. As an example, in 1990 a female sample member marries and her new husband, Head, moves into the study. In that wave, we receive reports of their mutual Marriage and each of them has a record on the Marriage History File registering the other as spouse. They each receive values of 1990 for MH17. In each successive wave their marriage is reconfirmed and values for MH17 are updated until 1994, when they separate and divorce. He, the non-sample husband and former Head, leaves the PSID but the sample Spouse remains response. The record for her marriage to him is updated to indicate the revised status, the dates of separation and divorce are added, and MH17 receives a value of 1994. But his record is not updated; his status remains married, and MH17 retains a value of 1993.

The preparation of the 1985-2015 file involved a great effort to eliminate real inconsistencies. If a couple no longer living together disagreed on their marital status but both were responding at the same time, PSID staff attempted to reconcile the differences. Marriage and birth dates were cross-checked to ensure that marriages do not occur until an individual is at least 13 years old. Eleven marriages remain in which the individual reports a start date before that age. We are unable to resolve these cases. In most of them, marriage at age 11 or 12 is possible. Five of these persons are females from the 1990 Latino sample, and two are from the 1997 immigrant sample. For the latter, subsequent birth date information may clarify matters.

On a related note, an individual's birth date is copied from the current wave of the Individual File when his or her marriages first appear on the cumulative Marriage History File. This birth date is not updated in later years for the initial record(s). If a new marriage subsequently occurs for the individual, then his or her birth date from that later wave is used in the construction of the new record. Thus, birth dates for the same individual may disagree across marriages if the reports were not collected in the same wave. These discrepancies were cleaned to some extent but only as a by-product of other cleaning activities.

Attempting birth date consistency is made difficult because of individuals' varying years of participation in the study. In the longer term, we hope to clean these dates but, for the present, we advise analysts to use the individual's birth date or age variables from the most recent year of Individual File data for which he or she is present in the study.

We checked the internal consistency of marriage dates: termination dates must not precede marriage dates and an earlier marriage must end by the time a later marriage begins. All cases in which divorce dates preceded separation dates were checked for coding/data entry errors and against corroborating sources (e.g., if the spouse had ever been in the study, his or her date of move out was

compared to the separation date). In 136 cases, indeed the couples did not separate until after their divorces were finalized. In 27 cases, we were unable to resolve the final status of a person's earlier marriage. These individuals appear to be bigamists, and probably are. The earlier marriage records have values of 7 for the status variable (MH12).

Yearly fluctuations in status were reconciled as information from each successive wave was incorporated. For example, divorcees have been known to report themselves as widowed after their ex-spouses' deaths; their statuses were recoded to divorced. Individuals who separate and then resume living together were recoded as married. The fact of their former separation must, of necessity, disappear from the file. Interruptions of this sort can be found by comparing the couple's data records on the cross-year individual file for co-residence; that is, comparing their yearly family interview numbers and sequence numbers (e.g., for 1990, V30642/ER30642 and V30643/ER30643). And every attempt was made to reconcile differing reports of status between couples if they were present in the same wave.

Spouse identifiers were checked against cross-year individual data and against the 1985-2015 Childbirth and Adoption History File to ensure that no spurious cases of intergenerational incest occur. If both spouses had been in the study, their sexes from the cross-year individual file were checked against each other.

Our final checks assured that all individuals who had ever qualified for marriage history questions had records on the file and that individuals who had never qualified did not.

8.11 Who has Cross-Year Information? TOC

Please keep in mind another PSID intricacy when matching across files: while all individuals were present in a PSID family, many spouses identified in the marriage histories have never been present in a PSID family unit during the years the study has been in progress; these spouses have values for "Person Number of Spouse" (MH8) in the range 800-995. Consequently, each individual has been in a PSID family unit and has a record on the 1968-2015 Individual File but his or her spouse may or may not.

8.12 What Cross-Year File to Use for Merging TOC

The 1985-2015 Marriage History File matches the 1968-2015 Individual File exactly. If you attempt to merge the 1985-2015 Marriage History File with earlier individual data releases, some cases on the merged file will not match and may result in the assignment of some erroneous spousal relationships! See the next section for details.

8.13 Marriage Order TOC

As described in above, in the initial wave of demographic event history collection in 1985, all Heads, Spouses and Partners were asked to provide details about all of their marriages. But in subsequent waves, the retrospective marriage history questions for new Heads, Spouses and Partners permitted detailed information about only two marriages, the first and the current or most recent. OFUMs were never asked about all their marriages; even in 1985 we requested reports about only the first and current or most recent. Even so, the Marriage History File contains complete histories for most individuals, since

more than two marriages is a relatively rare event. The number of individuals reporting more than two marriages is 4,165; 2,881 of them have reported all their marriages, but 1,284 have not.

The order of each marriage for an individual is indicated in MH9; values are assigned to each marriage in chronological order. The 1,284 individuals for whom we have received incomplete reports have gaps in the values for marriage order across their records. For example, if a person has been married three times but we have received detailed information about only the first and last marriages, the first marriage is assigned a value of 1 and the last marriage receives a value of 3. No record for marriage number 2 is on the file. These individuals can easily be identified, as values for the number of their marriages (MH18) are greater than values for the number of their records (MH20), of course excluding cases where the number of marriages contains missing data.

The relative order of marriages is always clear because of the way in which the questions are asked and updated. A missing beginning date for a marriage does not cause its order to be unknown. However, 318 individuals have a marriage of unknown order. This has happened in two different circumstances. If the interviewer did not obtain a complete marriage history when the individual entered the study but he or she was known then to be or have been married, we created a record for that current or most recent marriage with the information available. This situation accounts for the overwhelming majority of the cases (310). These persons have a known spouse at MH7-MH8, a known marital status at MH12, but the number of their marriages is not ascertained (MH18=98) and the number of records for them (MH20) equals 1.

The second, much rarer, circumstance in which a marriage is known to have taken place but its order is not ascertained occurs when the total number of marriages is not ascertained but the person reports a first and a last. Only eight individuals on the file fit this profile. Their first marriage receives an order value of 1, of course, but the last must of necessity have a value of 98. At least through the 2015 wave, however, no person has more than one marriage with order unknown.

8.14 Linking records TOC

8.14.1 Using the Marriage History File with the Cross-year Individual File

The Marriage History File is designed to be linked to PSID Individual data for analysis purposes. The Marriage History File has only a modest amount of information about the individual and his or her spouse(s). The analyst will no doubt want to access the much greater volume of data available for these individuals on the Family and Individual Files. Those files can provide abundant information for many individuals dating back to 1968 when the PSID began, although, for some, the span of available data is more limited or nonexistent.

When matching the 1985-2015 Marriage History File to individual data, only the 1968-2015 Individual File should be used. During file merging, a number of unique individual identifiers were corrected. Special care was taken to ensure perfect correspondence in individual identifiers between this

file, the 1985-2015 Childbirth and Adoption History File, and Public Release of the 1968-2015 Individual File.

Because of the corrections, do not attempt to match this file with any other PSID data file or a subset derived there from using these unique individual identifiers. Non-matches in individual records definitely will occur if any other file besides the above-named is used.

Data processing is required to link records between these two files. To achieve linkages, one must match on the unique individual-specific identifier. This unique identifier is a combination of two variables: "1968 Family Interview Number" (MH2) and "Person Number" (MH3). The corresponding variables for this unique identifier on the cross-year Individual File are ER30001 and ER30002. Care must be taken with regard to the proper files to use, the choice of individuals on the Marriage History File for whom matches are attempted, and the years for which data are available.

For those persons with records on both the Individual File and the Marriage History File, linkages rely on a match of individual-specific identifier variables that appear on both files. As noted earlier, the unique identifier involves two variables: "1968 Family Interview Number" and "Person Number". The corresponding set of variables on the two files must match to properly link an individual's records from the two sources. The variable names for these two variables are ER30001 and ER30002 on the Individual File. On the Marriage History File, they are MH2 and MH3, respectively, for the person designated "individual" and MH7 and MH8 for the person designated "spouse". Note that such linkages involve a one-to-many-match. One record on the Individual File may have more than one matching record on the Marriage History File because the specified individual has multiple marriages.

8.14.2 Using the Marriage History File with Other Demographic History Files

Some analysts may be interested in linking information from different records on the Marriage History File or linking information from records on different demographic files. For example, access to both marriage and childbirth records for an individual are needed to determine, via comparisons of marriage and childbirth dates, the number of biological children an individual has when he or she remarries. To make links such as these, one must match on the unique individual-specific identifier, which is a combination of two variables -- "1968 Family Interview Number" and “Person Number" (MH2 and MH3 for the person designated as the individual on the 1985-2015 Marriage History File; CAH3 and CAH4 for the person designated as the parent on the 1985-2015 Childbirth and Adoption History File).

8.15 Marriage Information Available on Individual Files TOC

Some of the information provided on Marriage History Files is also available on the cross-year Individual File. In addition, the Individual File contains some detail relating to marriage issues that the Marriage History File does not.

The following listing shows all of the marriage history-related variables included in Public Release versions of the cross-year Individual File. All are individual-level variables.

ER32033 Year Marital Info Most Recently Updated

ER32034	# Marriages of This Individual
ER32035, ER32036	Month and Year First/Only Marriage Began
ER32037	Status of First/Only Marriage
ER32038, ER32039	Month and Year First/Only Marriage Ended
ER32040, ER32041	Month and Year Separated First/Only Marriage
ER32042, ER32043	Month and Year Most Recent Marriage Began
ER32044	Status of Most Recent Marriage
ER32045, ER32046	Month and Year Most Recent Marriage Ended
ER32047, ER32048	Month and Year Separated Most Recent Marriage
ER32049	Last Known Marital Status

These variables are compiled from marriage history information collected from the 1985 wave through the most current wave of cross-year individual information included on the file.

8.16 Codebook TOC

The item-by-item descriptions for all of the variables in the Marriage History File can be found in the codebook. Unweighted frequencies were calculated for each variable.

9. PARENT IDENTIFICATION FILE (PID) TOC

The Parent Identification File synopsizes information collected about parent-child relationships from various sources since the 1983 wave of the PSID. This file consists of identifier variables that link children with their parents.

The data records are short. They contain relevant identifiers for the child, his or her birth and adoptive parents, and information source indicators. The file is intended to be used to facilitate linking children's and parents' data records from the 1968-2015 Individual File. Linkages can be done from either the child's or a parent's standpoint.

9.1 Sources of parental identifier information TOC

Parent-child information has been collected in many different ways since the PSID began; this file exploits most of those sources.

For the 1983 and 1984 waves, interviewers were asked to indicate the names of birth mothers on the family listings for each person then associated with a responding family unit. The information was checked by PSID staff, and the mothers' identifiers were coded during family composition editing. Beginning in 1985, and continuing through the present, retrospective childbirth and adoption histories have been asked for many individuals. See the 1968-2015 Childbirth and Adoption History File documentation for details about qualifying persons.

In the 1988 wave, a supplement about time and money help given to and received by the family was added to the usual questionnaire schedule. Part of this supplement included collecting the names of the Head's and Spouse’s/Partner’s parents, regardless of whether any transfer of help had occurred. Some of the parents were or had been PSID family members, but others had never been part of the study. During family composition editing, individual identifiers were assigned to each of the parents. If a parent

had ever been in the study, then his or her identifiers were coded; a "new" parent was given his or her own unique values. These unique identifiers for all parents of the 1988 Head and Spouse/Partner were never released by the PSID, although the 1988 Family File includes a lot of information about those parents and their assets and a concurrent linking identifier to the parents' family data if they were response in 1988.

In a related piece of the 1988 supplement, individual identifiers were coded for other people outside the family unit who had given or received help. Some of these individuals were children of the Head or Spouse/Partner. Data for all givers and receivers, including records and identifiers for parents and children, were released as the 1988 Time and Money Transfers File.

Interviewers' thumbnail sketches and marginal notes can be precious sources of incidental information about family relationships. They have been remarkably useful to PSID staff during family composition editing for unusual cases in which youngsters, e.g., grandchildren, appear in a family unit but for whom no parental acknowledgement exists on the Childbirth and Adoption History File. Since PSID samplehood depends on ancestral antecedents (staff have termed this "carrying the sample gene"), knowledge of parentage is crucial in determining sample membership and followability. Beginning in 1996, staff have been coding parental identifiers for some individuals whose progenitors were not established through the birth history reports but were named in interviewer notes.

In a procedure related to the PSID's Child Development Supplement (CDS) in 1997, and continued for 1999, interviewers were instructed to indicate mother and/or father for each child in the family unit if the parent was included in the same family unit. This information was used to determine whether a CDS absent parent interview was called for and, additionally, to invoke a set of questions about child support if one or both parents were not part of the same family unit as the child. In 1999, these questions were not used for additional data such as child support or the CDS, but they provided some verification of parenthood and are being continued in anticipation of future waves of CDS.

The 1997 child support sequences identified the person in the family who received support for a co-resident child, usually a parent. Additionally, they included asking whether any family member was responsible for children who were not currently co-residents in the family unit. If such a family member existed, then he or she was identified and the names of the children were collected. During 1997 family composition editing, individual identifiers were assigned to the children.

In the 2013 wave, a Parent/Child Rosters and Transfers Supplement was added to the PSID questionnaire. This supplement asked most respondents to provide the names of living parents and adult children for the Head and S During data editing, individual identifiers were assigned to “new” parents and children.

9.2 How to obtain the file

TOC

The 2015 Parent Identification is available in the Data Center as well as in .zip format on the Packaged Data page of the PSID website.

9.3 Structure of the file TOC

The 2015 Parent Identification File contains a total of 93,633 records. Included are all individuals from the 1968-2015 Individual File and, additionally, records for known children from the Childbirth and Adoption File and the 1988 Time and Money Transfers File. Children in this latter group have never been included in a PSID family.

The file is sorted, in ascending order, by "1968 Interview Number of Individual" (PID2) and "Person Number of Individual" (PID3). These two variables, taken together, constitute a unique identifier or each person and record.

The file contains 32 variables. Besides the pair of identifier variables for the child, four more sets of parental identifiers are present, one set each for birth and adoptive mothers and fathers. Variables indicating the source of the parental information are also included. Please see the codebook for the full listing of these variables, along with the code frame, and frequencies in the sample.

9.4 Idiosyncrasies, data cleaning, and variable detail TOC

Some people whose existence has been reported by PSID respondents do not have a record on this file. These "missing persons" are forever-absent spouses who have never been named as children by anyone in the study and some other individuals (e.g., siblings, nephews or nieces, grandchildren) listed in the 1988 Time and Money Transfers File.

Of the 93,633 individuals who do have records on the Parent Identification File, approximately two-thirds of the records contain identifiers for at least one natural or adoptive parent. Some of the remaining individuals, those with no identified parent, will acquire known parents in future waves.

Parent and child identifiers from the various sources were checked against each other for inconsistent parent reports. In addition, because the parent identifiers are sex-specific, they were checked against the Individual File's “Sex of Individual” variable, ER32000.

Parental reports from the Childbirth and Adoption History File, parent coding by PSID staff in 1983-1984, and, anecdotally, from 1996 onward differentiate between birth and adoptive parents, but none of the other sources specify whether a reported parent is biological or adoptive. For the purpose of file creation, all parents were assumed to be birth parents unless contradicted by one of the differentiated sources.

The 2015 Parent Identification File matches the 1968-2015 Public Release Individual File exactly. If you attempt to merge the 2015 PID file with an earlier release, some cases on the Individual File will not match and may ascribe erroneous parent information to a person. See the next section for details.

9.5 Linking records TOC

The Parent Identification File is designed to be linked to PSID Individual data for analysis purposes. The Parent Identification File consists only of identifiers for child and parent, plus the dummy variables indicating sources of reports. The analyst most definitely must access the substantive data available for many of these individuals on the Family and Individual Files. Those files can provide abundant information for many individuals dating back to 1968 when the PSID began but, for others, the span of available data is more limited or nonexistent.

When matching the 2015 Parent Identification File to individual data, only the 1968-2015 Individual File should be used. During file merging and cleaning, a number of unique individual identifiers were corrected. Special care was taken to ensure perfect correspondence in individual identifiers between this file, the 1985-2015 Childbirth and Adoption History File, and the 1968-2015 Individual File.

Because of the corrections, do not attempt to match this file with any other PSID data file or a subset derived there from using these identifiers. Non-matches in individual records definitely will occur if any other file besides the above-named is used.

Data processing is required to link records between these two files. To accomplish linkages, one must match on the unique individual-specific identifier. This unique identifier is a combination of two variables: "1968 Family Interview Number" and "Person Number" (e.g., PID2 and PID3 for a child). The corresponding variables for this unique identifier on the cross-year Individual File are ER30001 and ER30002. In doing this matching, care must be taken with regard to the proper files to use and the choice of individuals on the Parent Identification File for whom matches are attempted.

For persons with records on both the Parent Identification File and the Individual File, linkages rely on a match of individual-specific identifier variables that appear on both files. As noted earlier, the unique identifier involves two variables: "1968 Family Interview Number" and "Person Number". The corresponding set of variables on the two files must match for proper linkage to an individual's records from the two sources. The variable names for these two variables are ER30001 and ER30002 on the Individual File. On the Parent Identification File, they are PID2 and PID3, respectively, for the child and PID4 and PID5, PID6 and PID7, PID18 and PID19, or PID20 and PID21 for a parent.

9.6 Codebook TOC

The item-by-item descriptions for all of the variables in the Parent Identification File can be found in the codebook. Unweighted frequencies were calculated for each variable.

10. SAMPLE WEIGHTS TOC

To account for differential probabilities of selection due to the original PSID sample design and subsequent attrition, the PSID data are provided with weights. The PSID’s dynamic sample design and following rules are the building blocks for the strategy used in weight construction, the assignment of

weights, and the use of weights in different types of analysis. The following rules are important for understanding how the weights are constructed, and how weights should be used in different types of analysis.

For the main interview, PSID creates longitudinal individual weights, longitudinal family weights, and cross-sectional individual weights. Further documentation describing the construction of the PSID weights are available on the questionnaires and supporting documentation page of the PSID website.

11. SUPPLEMENTAL STUDIES TOC

In addition to the main PSID interview, numerous supplemental studies (outside the main interview) have been conducted throughout the years. This section provides an overview of current supplemental studies and point users to relevant documentation.

11.1 Child Development Supplement and Transition into Adulthood Supplement TOC

The Child Development Supplement (CDS) is a research component of the Panel Study of Income Dynamics. The CDS provides researchers with extensive data on children and their extended families with which to study the dynamic process of early human and social capital formation. The first CDS study included up to two children per household who were 0 to 12 years old in 1997 and followed those children over three waves, ending in 2007-08. CDS-2014 covers all sample children in PSID households born or adopted into the PSID since 1997. The study design and questionnaire content are consistent with earlier waves of CDS to permit cross-cohort analysis of children's development.

The Transition into Adulthood Supplement (TAS), initiated in 2005 and collected biennially, captures data on the developmental pathways and outcomes of children who participated in the 1997 CDS through 2015, and young adults in all PSID families from 2017 forward as they transition into adulthood. The TAS fills a gap between information collected in the CDS and information on adulthood collected from panel members who enter the main PSID study once they have assumed economic independence as heads and spouses.

The TAS interview domains are coordinated with the CDS adolescent measures and the PSID employment and health measures, and also include measures unique to this transitional stage. Together with almost 50 years of longitudinal data in the PSID, the CDS and TAS support a wide range of research on the ways in which time, money, social resources, parenting practices, and characteristics of caregivers and family members are linked to the cognitive and behavioral development of children, adolescents, and young adults. All CDS and TAS documentation and data are available on the PSID website.

11.2 Childhood Retrospective Circumstances Study TOC

The 2014 Childhood Retrospective Circumstances Study (CRCS) is the first study conducted by the PSID using the internet as the primary mode of data collection. The goal of the study was to design

and collect a mixed mode (web or paper) module from household heads and, if married/cohabitating, spouses/partners, about their childhood experiences. The data may be used to study early life influences on adult health and economic outcomes. CRCS documentation and data are available on the PSID website.

11.3 Wellbeing and Daily Life Supplement

The 2016 Wellbeing and Daily Life study is a supplement to the Panel Study of Income Dynamics. The PSID-WB questionnaire was designed as a relatively brief (20-30 minute) self-administered instrument that could be completed via the internet or paper by all household heads and spouses/partners ages 30 and older. The questionnaire collects information on three main topics of interest – wellbeing (Sections A-C), personality traits (Sections D-G), and cognitive skills (Sections H-K). PSID-WB documentation and data are available on the PSID website.

12. RESTRICTED USE DATA TOC

In order to safeguard the confidentiality of respondents at the highest level, some data are provided only under conditions of a restricted use contract between the researcher and the University of Michigan. A description of the available data, the documentation, the procedures for obtaining the data, and the requirements for those who gain access to such data is provided on the restricted data section of the PSID website.

13. DATA DISTRIBUTION TOC

The long period over which data have been collected, the extensive range of measures captured in the instrument, and the genealogical design make the PSID a valuable data source. At the same time, these qualities combine to make the PSID increasingly complex for users. Therefore, tools have been developed to allow users to take full advantage of the many aspects of the unique data. In this section we describe some of these tools.

13.1 Internet-based Data Center TOC

The PSID began distributing data through an on-line Data Center in 1996. The Data Center allows users to create customized longitudinal datasets from all waves of the main interview as well as some supplemental data collections by choosing various options, creating customized codebooks specific to the data that has been downloaded, searching and browsing for variables, adding multiple variables at once via the variable list function, and archiving data downloads for shared and future use. Users add variables to their data carts, and when they are ready to download their data, or "check out," they first view the contents of their data cart. Users also see an information icon next to each variable, and pressing on this icon takes them to a window that contains the full codebook documentation for that variable. Users can then choose to edit their cart by removing any unwanted variables, or they can add variables by

returning to the "data aisle" for more items. They may also choose to completely empty their data cart, or to proceed to download their data, i.e., "check out."

Data carts may also be saved and named, allowing users to easily track specific data downloads. Users can choose from a range of output types including SAS, SPSS, STATA, dBase, and ASCII. Moreover, users can specify the data subset in a selection phase.

13.2 Online cross-year variable index TOC

In the cross-year index, users view a given domain of variables – income, health, or wealth, for example – and then "unfold" this category to see all of the variables related to that domain. For a given specific variable -- for example, current employment status -- the index will list the years that the variable is available. The user can then click on the year to view the codebook for that specific year, and they can click on the year indicator for the given variable to add that variable for that year to their data cart. In sum, the cross-year index integrated with the Data Center allows users the option of "browsing" the entire PSID archive sorted by variable domains.

13.3 Family Identification Mapping System TOC

Because of its genealogical design, the PSID is one of the few nationally representative US datasets that can be used for intra- and intergenerational analyses. As described above, from its beginning the PSID has followed all 1968 family members and their descendants. When family members split-off and create their own separate family, the PSID interviews these new families as well as the original family. The numbers of sibling pairs, child-parent pairs, and grandparent-grandchild pairs are substantial. For example, tens of thousands of sibling pairs exist in the data archive. Of course, not all siblings are alive or reporting data in each and every wave of the PSID, therefore the number of siblings available for any particular analysis will be smaller. But in the more recent waves, there are thousands of sibling pairs who are Heads or Spouses/Partners, which means that the full set of PSID data is collected on these siblings. These large samples support a wide range of analyses, but the creation of these files is complex, and can be prohibitively so for some users.

With the goal of facilitating the use of these data to support complex models of family and life course development, the PSID offers a Family Identification Mapping System (FIMS). FIMS creates a customized file – i.e., "map file" - that contains the identification variables of the relatives an analyst wishes to examine. FIMS also supplies code (for SAS, SPPS, and Stata) that uses the map file and a file containing the variables the analyst wishes to examine to create a new data file that includes the variables for the relatives of interest. For example, an analyst may be interested in "biological grandparents" as the relative of interest. FIMS would then generate a file that contains the IDs of all PSID sample members and each of their four biological grandparents if they were ever observed in the PSID. FIMS provides code that will create a data file in the shape desired by the analyst. The shapes available are "wide" – i.e., one observation per grandchild – and "long" – i.e., one observation per grandchild-grandparent pair. The

user would then create an individual level data file that contains all of the variables they want and merge it with the FIMS file to match them to grandchildren and their grandparents.

FIMS offers three distinct types of maps. The intra-generational (SIB) map allows the identification of various types of siblings (full siblings, half siblings). The inter-generational (GID) map matches PSID individuals to their predecessors, going back up to three generations, i.e. parents, grandparents, and great-grandparents. This intergenerational map is thus retrospective in nature. That is, it starts with an individual and goes back along in his or her family lineage. In 2014, a prospective inter-generational map (GID PRO) was added to FIMS. Here, the starting generation (G1) is the original sample from 1968 (person numbers between 1 and 19). Descendants of original PSID households form subsequent generations, again up to three generations down (G2 - child, G3 – grandchild, G4 – great-grandchild). The prospective generation map format is long, i.e., each row is a distinct set of individuals observed in the PSID. The map also provides biological relation (father or mother) between individuals and generation position of all individuals listed on each row. In 2015, there are 3,489 great-grandchildren of sample members who are heads or spouse/partners. There are an additional 3,357 grandchildren and 5,424 children in the sample.

13.4 Video Tutorials TOC

A series of online, on demand video tutorials have been created to help users learn about the PSID data. These tutorials are available on the PSID website.

13.5 Cross National Equivalent File TOC

The Cross-National Equivalent File contains equivalently defined variables for the PSID and PSID-like studies in several other countries. The data and a description of this project, which is led by researchers at Cornell, is currently being housed at Ohio State University.

13.6 Tax information TOC

For estimates using TAXSIM from 1999-2011 see Kimberlin, Kim, & Shaefer (2015) who provide an updated method for calculating income and payroll taxes from PSID data 1999-2011. The PSID website also includes Stata programs describing a method to calculate income and payroll taxes using TAXSIM. Data and programs for 2013 and 2015 are forthcoming.

14. DATA QUALITY TOC

PSID staff members and other researchers in the scientific community regularly assess the quality of the data. On the PSID website is a Data Quality Bibliography containing references to such studies. PSID staff members have written technical papers that contain cross-sectional comparisons of total family income between the PSID and the March Current Population Survey, and cross-sectional estimates of health status and health behavior between the PSID and the National Health Interview Survey. A detailed

description of how these comparisons are conducted is contained in these technical papers and the data comparisons webpage contains updated to these comparisons through 2015.

A 2011 technical paper, which is available on the PSID website, reports rates of item non-response for some of the most salient questions in the PSID from 1968 to 2009 and provides a detailed description of the variables and the approach for calculating the item non-response rates.

15. GETTING HELP

TOC

If you have questions about the PSID that are not answered in the user's manual, the first place to check is the list of frequently asked questions. If you cannot find the answer to your question after reviewing the documentation and FAQs, contact us via the PSID Help Desk at PSIDhelp@umich.edu.

16. FUNDING AND ADMINISTRATION

TOC

The PSID has been funded from a variety of sources through the years. Over the past decade, the National Science Foundation (NSF), the National Institute on Aging (NIA), and the *Eunice Kennedy Shriver* National Institute of Child Health and Human Development (NICHD) have been the primary sponsors. During the current funding cycle 2012-2016, support has also been received from the following agencies: , the Indiana University Lilly Family School of Philanthropy, the Economic Research Service of the United States Department of Agriculture, and the Assistant Secretary for Planning and Evaluation of the United States Department of Health and Human Services.

Since 1982, the study has been advised by a Board of Overseers, created by NSF to foster input from the national community of scholars, researchers, and policymakers. The members of the Board are listed on the PSID website.

From its beginning in 1968 until 1989, the PSID was founded and directed at the Survey Research Center, University of Michigan by James Morgan. Frank Stafford was the Project Manager beginning in 1968. From 1982-1989 responsibility for running the study was also shared by Greg Duncan (as co-Director), Daniel Hill, and Martha Hill. Between 1989 and 1995 Greg Duncan directed the study, with Martha Hill and James Lepkowski as co-Directors. Frank Stafford became Director of the study in 1995, with Sandra Hofferth as co-Director until 2001, and Wei-Jean Yeung as co-investigator. Between 2001 and 2010 responsibility for running the study was additionally shared by Robert F. Schoeni and Katherine McGonagle. Jacqueline Eccles and Robert Wallace were co-investigators starting in 2007. Narayan Sastry and Vicki Freedman joined the team as co-Principal investigators in 2008 and 2010, respectively. During 2010 – 2011, Robert Schoeni and Charles Brown were co-Directors, McGonagle was Assistant Director, and the co-investigators included Vicki Freedman, Narayan Sastry, and Frank Stafford. From 2012-2016, Charles Brown was Director, Narayan Sastry and Vicki Freedman were Associate Directors, and Katherine McGonagle was Assistant Director. Co-investigators included Robert

Schoeni, Frank Stafford, and Fabian Pfeffer. Starting in 2017, David S. Johnson assumed the role of Director, with Narayan Sastry and Vicki Freedman as Associate Directors, Katherine McGonagle as Assistant Director and Co-Investigators Charles Brown, Robert Schoeni, Frank Stafford, and Fabian Pfeffer, and Paula Fomby is a Co-Investigator for CDS.

17. INDICATORS OF SCIENTIFIC IMPACT TOC

In this section we report on several indicators of the usefulness of the data, including: number of published articles using the PSID, grants awarded by NIH and NSF to support research using the PSID, registered users, hits to the PSID website, and data downloads.

17.1 Peer-reviewed publications using the PSID TOC

As of January 2017, PSID staff has located 4,412 peer-reviewed publications based on PSID data. This total includes 2,966 journal articles, 644 books and book chapters, and 802 dissertations. Articles based on the PSID appear in top journals. PSID staff has ranked academic journals based on numbers of PSID manuscripts ever published, and the top 10 in rank order beginning with the top are: American Economic Review, The Journal of Human Resources, The Review of Economics and Statistics, Demography, Journal of Labor Economics, Journal of Marriage and Family, Social Science Research, Journal of Monetary Economics, Journal of Political Economy, and Journal of Public Economics. Articles have appeared in many journals from a variety of scientific disciplines, including economics, sociology, demography, public health, medicine, child development, geography, and psychology.

17.2 Grants awarded by NSF and NIH using the PSID

Although the vast majority of social science research in the U.S. is conducted without grant support, a substantial share is. Another indication of the value of the data is its use in grant supported research. As of April 2017, there have been approximately 300 awards made by NSF and NIH to support the collection and secondary analysis of PSID data, with NSF making about 30% and NIH making about 70% of all awards. The vast majority of all awards made have supported secondary data analysis. These totals are likely to be an underestimate of the total number of awards made by these agencies as the database searches abstracts only; thus an award that did not use ‘PSID’ or ‘Panel Study of Income Dynamics’ in its abstract could not be identified.

17.3 Website activity, data downloads, and numbers of users TOC

Information on general website activity is monitored by PSID with summary statistics for each year reported. In calendar year 2015, there were almost 4.3 million total page hits to the PSID website made by 113,596 unique visitors (i.e., IP addresses). User activity specific to the actual downloading of data is also assessed. There are two ways to download data, both through the PSID Data Center. The first way is to create customized datasets directly from the Data Center by selecting various types and years of data and variables. The second way is to download complete data files that are compressed in zip

packages. In total, there were 36,566 data downloads during this period. Across both types of downloading, these datasets were created by nearly 2,616 unique registered users.

Effective September 1, 2006, individuals wishing to download PSID data are required to provide basic information including their email address, name of institution or organization, affiliation (academic, governmental, private, other), and scientific field or discipline. In calendar year 2015, there were over 25,267 registered users, which is an increase of over 2,500 registered users (10%) over the past year: 69% have identified their major field as economics, 8% sociology, with the remainder distributed across education, psychology, demography, child development, medicine, geography and "other."

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Appendix A. Tables and figures describing income and wage imputation

A 2011 technical paper describes in detail the calculation of income and wages for the 2007 wave, including the imputation procedures used. The technical paper also provides a series of tables describing that process. In this appendix the same tables are reported, but based on the 2015 wave of data.

Table A1.1: Components of Head and Spouse Taxable Income

Head Wage and Salary Income	Spouse Wage and Salary Income	Head Income From Assets	Spouse Income From Assets	Net Profit from Farm or Business
Head Wages ER65200	Spouse Wages ER65228	Head Interest Income ER65221	Spouse Interest Income ER65249	Head Net Business Income ER65197, ER65198
Head Bonus ER65202	Spouse Bonus ER65230	Head Dividend Income ER65219	Spouse Dividend Income ER65247	Spouse Net Business Income ER65225, ER65226
Head Overtime ER65204	Spouse Overtime ER65232	Head Rental Income ER65217	Spouse Rental Income ER65245	Net Income from Farm ER65195
Head Tips ER65206	Spouse Tips ER65234	Head Trust Funds ER65223	Spouse Trust Funds ER65251	
Head Commissions ER65208	Spouse Commissions ER65236			
Head Professional Practice ER65210	Spouse Professional Practice ER65238			
Head Additional Job Income ER65212	Spouse Additional Job Income ER65240			
Head Miscellaneous Labor Income ER65214	Spouse Miscellaneous Labor Income ER65242			

Table A1.2: Head of Household Wage and Salary Income Imputation Process in the 2015 PSID

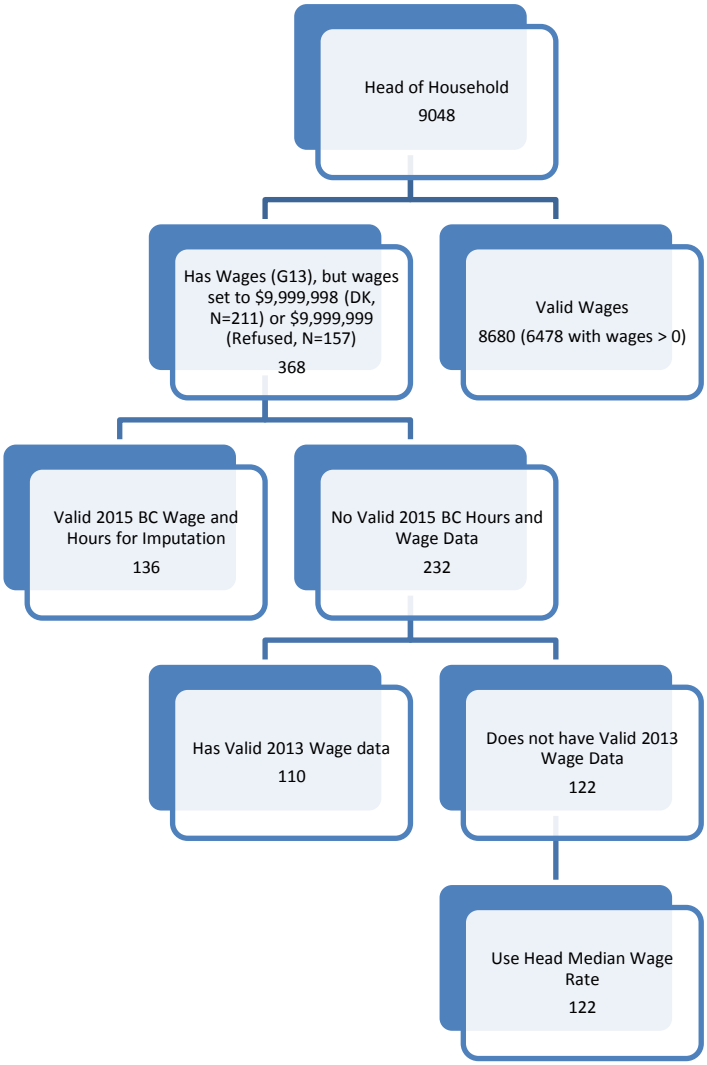

Table A1.3: Spouse Wage and Salary Income Imputation Process in the 2015 PSID

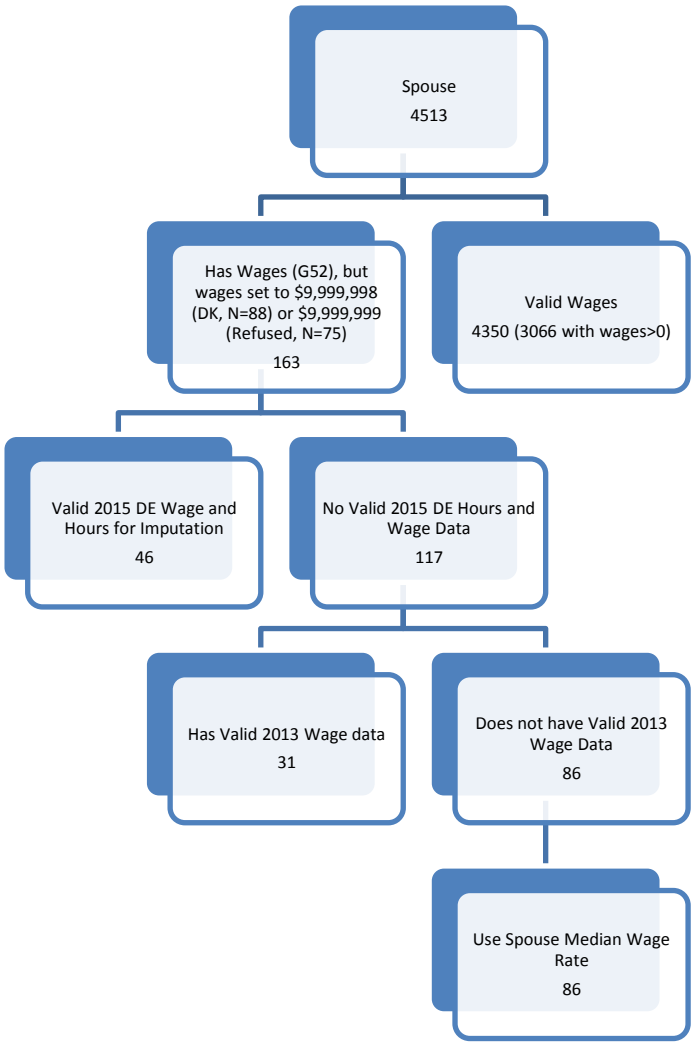

Table A1.4a: 2015 Overtime, Tips and Commission Imputation - Head

Income Source	# Heads with non-zero income	Impute Using Individual Jobs Data (Step 1)	Impute Using Average Income as a % of Wages by Occupation (Step 2)	Impute Using Overall Median Income (Step 3)
Overtime	327	11	30	6
Tips	106	0	6	1
Commission	47	1	4	0

Table A1.4b: 2015 Overtime, Tips and Commission Imputation - Spouse

Income Source	# Spouses with non-zero income	Impute Using Individual Jobs Data (Step 1)	Impute Using Average Income as a % of Wages by Occupation (Step 2)	Impute Using Overall Median Income (Step 3)
Overtime	70	0	4	6
Tips	39	0	4	0
Commission	17	0	2	0

Table A1.5a: 2015 Head Bonus Imputation

Heads with non-zero Bonus income	583
Heads requiring Bonus income imputation	35
Use average bonus % by occupation (Step 1)	34
Use overall median bonus amount (Step 2)	1

Table A1.5b: 2015 Spouse Bonus Imputation

Spouses with non-zero Bonus income	205
Spouses requiring Bonus income imputation	10
Use average bonus % by occupation (Step 1)	5
Use overall median bonus amount (Step 2)	5

Table A1.6a: 2015 Professional Practice Imputation - Head

	Imputation Condition	# Heads with non-zero income in 2015	Step 1: Use Prior Wave Income for Head	Step 2: Use Median hourly rate. If hours not available, use 500 (done for 1 observation)
Professional Practice (ER65210)	Income outside the range of $0 and $9,999,996, or Don't Know (9,999,998) /Refused (9,999,999)	53	0	2

Table A1.6b: 2015 Professional Practice Imputation - Spouse

	Imputation Condition	# Spouses with non-zero income in 2015	Step 1: Use Prior Wave Income for Head	Step 2: Use Median hourly rate. If hours not available, use 500 (done for 0 observations)
Professional Practice (ER65238)	Income outside the range of $0 and $9,999,996, or Don't Know (9,999,998) /Refused (9,999,999)	23	0	0

Table A1.7: 2015 Asset Income Imputation

	# Heads/Spouses with Income>0	# Heads/Spouses with Imputed Values
Rent Head	515	16
Dividends Head	1017	180
Interest Head	3421	732
Trust Head	82	4
Rent Spouse	163	5
Dividends Spouse	433	65
Interest Spouse	1908	383
Trust Spouse	15	1

Table A1.8c: 2015 Net Business Income Imputation Prevalence by Family Business Ownership Type

Ownership	**# Businesses with Non-missing Net Income**	**# Businesses with Imputation Required**
Head	350	32
Spouse	89	7
Head & Spouse	71	5
OFUM Only	10	1
Head & OFUM	2	0
Spouse & OFUM	1	0
Head, Spouse & OFUM	0	0

Table A1.9: 2015 Net Business Income Imputation Methodology

Methodology	**Number of Businesses Imputed**
Using Self Employment data from Jobs section (Step 1)	1
Use Prior Wave's Net Business Income (Step 2)	4
Hot Deck Methodology (Step 3)	40

Table A1.10: 2015 Net Business Income Hot Deck Imputation Methodology

Cases for Which we Impute	Hot Deck Method	# Cases
Don't Know Loss (-999,998)	Assign Random Negative Income	0
N/A, Refused Loss (-999,999)	Assign Random Negative Income	0
Don't Know Gain (9,999,998)	Assign Random Positive Income	30
N/A, Refused Gain (9,999,999)	Assign Random Positive Income	10

Table A1.11: 2015 Transfer Income Imputation

Transfer Income Source	Who	Number where income amount>0	Number Imputed
Alimony (ER65276)	Head	27	2
Annuity (ER65264)	Head	95	11
Child Support (ER65274)	Head	371	13
Help Non-Relatives (ER65280)	Head	278	14
Help Relatives (ER65278)	Head	895	56
IRA (ER65266)	Head	181	13
Other Pension (ER65268)	Head	3	0
Other Transfer Income (ER65282)	Head	175	10
Retirement (ER65262)	Head	818	47
SSI (ER65256)	Head	249	12
TANF (ER65254)	Head	94	4
Unemployment (ER65270)	Head	279	4
VA Pension (ER65260)	Head	293	14
Welfare (ER65258)	Head	46	1
Workers Comp (ER65272)	Head	77	4
Alimony (ER65306)	Spouse	2	0
Annuity (ER65294)	Spouse	22	3
Child Support (ER65304)	Spouse	181	5
Help Non Relatives (ER65310)	Spouse	19	0
Help Relatives (ER65308)	Spouse	161	6
IRA (ER65296)	Spouse	63	10
Other Pension (ER65298)	Spouse	1	0
Other Transfer Income (ER65312)	Spouse	67	7
Retirement (ER65292)	Spouse	271	12
SSI (ER65286)	Spouse	39	5
TANF (ER65284)	Spouse	24	3
Unemployment (ER65300)	Spouse	104	1
VA Pension (ER65290)	Spouse	26	4
Welfare (ER65288)	Spouse	11	0
Workers Comp (ER65302)	Spouse	11	0

Table A1.12: 2015 Labor Income Imputation for Other Family Members

	# Jobs with income>0	# Imputations
Job 1	2198	638
Job 2	409	131
Job 3	92	39
Job 4	21	7

Table A1.13: 2015 Transfer Income Imputation for Other Family Members

	# OFUMS with Income Source>0	# Imputations
ADC (ER65332)	9	4
SSI (ER65324)	169	9
Welfare (ER65326)	25	4
VA Pension (ER65328)	11	2
Pension (ER65330)	62	21
Unemployment (ER65332)	8	3
Workers Comp (ER65334)	0	0
Child Support (E65336)	32	11
Support from Relatives (ER65338)	29	0
Other (ER65340)	67	4

Table A1.14: 2015 Social Security

	Number with Social Security Income> $0	# Imputations
Heads (ER65343)	1690	100
Wives (ER65345)	620	40
OFUM (ER65347)	464	64

Table A1.15: 2015 Weeks and Hours Variables

Variable Name	Variable Description	Variable Group
ER65150	HEAD WORK WEEKS	Weeks
ER65152	HEAD WEEKLY WORK HOURS	Hours Worked
ER65154	HEAD OVERTIME WORK HOURS	Hours Worked
ER65156	HEAD TOTAL HOURS OF WORK	Hours Worked
ER65157	HEAD WEEKS MISSED FOR ILLNESS OF OTRS	Weeks
ER65159	HEAD WEEKS MISSED FOR OWN ILLNESS	Weeks
ER65161	HEAD WEEKS OFF FOR VACATION	Weeks
ER65163	HEAD STRIKE WEEKS	Weeks
ER65165	HEAD WEEKS LAID OFF	Weeks
ER65167	HEAD UNEMPLOYMENT WEEKS	Weeks
ER65169	HEAD WEEKS OUT OF LABOR FORCE	Weeks
ER65171	SPOUSE WORK WEEKS	Weeks
ER65173	SPOUSE WEEKLY WORK HOURS	Hours Worked
ER65175	SPOUSE OVERTIME WORK HOURS	Hours Worked
ER65177	SPOUSE TOTAL HOURS OF WORK	Hours Worked
ER65178	SPOUSE WEEKS MISSED FOR ILLNESS OF OTRS	Weeks
ER65180	SPOUSE WEEKS MISSED FOR OWN ILLNESS	Weeks
ER65182	SPOUSE WEEKS OFF FOR VACATION	Weeks
ER65184	SPOUSE STRIKE WEEKS	Weeks
ER65186	SPOUSE WEEKS LAID OFF	Weeks
ER65188	SPOUSE UNEMPLOYMENT WEEKS	Weeks
ER65190	SPOUSE WEEKS OUT OF LABOR FORCE	Weeks

Table A1.16: Weeks Worked Imputation

	2015
Number of Heads/Spouses with Jobs	10325
Number of Heads/Spouses with Jobs with Weeks Worked Edits	57

Table A1.17c: 2015 Imputation Values for Time-Off Categories

Variable	Variable Description	Edits Made by Data Processing Staff	Imputations Made Using Constant Substitution	Constant Value Used for Imputation
ER65161	Head Weeks not working due to vacation	57	7	1 Week
ER65159	Head Weeks not working due to illness- self	6	8	0.4 Weeks
ER65157	Head Weeks not working due to illness – other	4	2	0.4 Weeks
ER65163	Head Weeks not working due to strike	0	0	3 Weeks
ER65165	Head Weeks laid off	10	2	2.5 Weeks
ER65182	Spouse Weeks not working due to vacation	22	8	1 Week
ER65180	Spouse Weeks not working due to illness- self	4	5	0.4 Weeks
ER65178	Spouse Weeks not working due to illness – other	3	10	0.4 Weeks
ER65184	Spouse Weeks not working due to strike	0	0	3 Weeks
ER65186	Spouse Weeks laid off	3	0	2.5 Weeks

Table A1.18: 2015 Time Not Working Imputations

	# Heads/Spouses with Weeks Manually Edited	# Heads/Spouses with Weeks Adjusted	# Head/Spouse Non-zero Weeks
Unemployment	33	0	1262
OOLF	31	12	3977

Table A1.19: 2015 Work Hours Imputation Summary

	2015
Number of Heads/Spouses with Jobs	10307
Number of Heads/Spouses with jobs for which Hours Worked has had Pre-imputation Manual Adjustments Applied	163
Number of Heads/Spouses with jobs for which we Impute Using a Value of 40 Hours per Week	28

Table A1.20: 2015 Overtime Hours Imputation Summary

	Manual Edits	Imputed	Number of Observations with Non-Zero Overtime
Head Overtime (ER65154)	4	101	1590
Spouse Overtime (ER65175)	2	31	456

Table A1.21c: 2015 Number of Families by Number Income Sources Imputed

Number of Income Sources Imputed	Number of 2015 PSID Families	% of Families
0	6822	75.40
1	1350	14.92
2	628	6.94
3	155	1.71
4	57	0.63
5	19	0.21
6	10	0.11
7	2	0.02
8	4	0.04
9	1	0.01

Table A1.22: Income Imputation PSID Codes

Imputation Method	Imputation Code
Data Processing Edit	1
Imputed from Other Information in the Interview	2
Imputed from Last Wave's Report	3
Imputed from Subgroup Means	4
Imputed Using Median Value of all Non-Zero Cases	5
Hotdeck Replacement	6

Table A1.23c: 2015 Income Imputation Summary Table

Source	# Obs with non-zero income (including imputed cases)	# Obs requiring imputations	Methodology	Accuracy Variable
Head Labor Income	6846	524	Step 1, Use PSID Employment Section BC/DE Wages/Hours/Weeks Worked to impute (136), else Step 2, Use prior year income (110), else overall median wage rate (122)	ER65201
Spouse Labor Income	3229	221	Step 1, Use PSID Employment Section BC/DE Wages/Hours/Weeks Worked to impute (46), else Step 2, Use prior year income (31), else overall median wage rate (86)	ER65229
Head Bonus	583	37	Step 1: Use average bonus percent by OCC code, apply to wages (33), else Step 2, Use overall median bonus percent (2)	ER65203
Head OT	327	51	Step 1, Use BC jobs info (11), else Step 2, avg OT as pct of wages by occ code (30), else median OT amount (6)	ER65205
Head Tips	106	10	Step 1, Use BC jobs info (0), else Step 2, avg tips as pct of wages by occ code (6), else median tips amount (1)	ER65207
Head Commission	47	6	Step 1, Use BC jobs info (1), else Step 2, avg tips as pct of wages by occ code (4), else median tips amount (0)	ER65209
Head Professional Practice	53	4	Step 1, Use Prior year (0), else Step 2, mean hourly rate * hours (use 500 hours if hours n/a) (2)	ER65211
Spouse Bonus	205	11	Step 1: Use average bonus percent by OCC code, apply to wages (5), else Step 2, Use overall median bonus percent (5)	ER65231
Spouse OT	70	10	Step 1, Use BC jobs info (0), else Step 2, avg OT as pct of wages by occ code (4), else median OT amount (6)	ER65233
Spouse Tips	39	4	Step 1, Use BC jobs info (0), else Step 2, avg tips as pct of wages by occ code (4), else median tips amount (0)	ER65235
Spouse Commission	17	3	Step 1, Use BC jobs info (0), else Step 2, avg tips as pct of wages by occ code (2), else median tips amount (0)	ER65237
Spouse Professional Practice	23	1	Step 1, Use Prior year (0), else Step 2, mean hourly rate * hours (use 500 hours if hours n/a) (0)	ER65239
Head Farm Income	24	2	Step 1, Farm Receipts - Farm Expenses (0), else Step 2, Prior Year Income (0) else Step 3, overall median farm income (2)	ER65196

Head Business	350	32	Step 1, Use BC/DE Self Employment Income (1), else Step 2, Prior year's income if same industry (3), else Step 3, hot deck within industry (28)	ER65193
Spouse Business	89	7	Step 1, Use BC/DE Self Employment Income (0), else Step 2, Prior year's income if same industry (0), else Step 3, hot deck within industry (7)	ER65193
Head & Spouse Business	71	5	Step 1, Use BC/DE Self Employment Income (0), else Step 2, Prior year's income if same industry (1), else Step 3, hot deck within industry (4)	ER65193
OFUM Only Business	10	1	Step 1, Use BC/DE Self Employment Income (0), else Step 2, Prior year's income if same industry (0), else Step 3, hot deck within industry (1)	ER65193
Head & OFUM Business	2	0	Step 1, Use BC/DE Self Employment Income (0), else Step 2, Prior year's income if same industry (0), else Step 3, hot deck within industry (0)	ER65193
Spouse & OFUM Business	1	0	Step 1, Use BC/DE Self Employment Income (0), else Step 2, Prior year's income if same industry (0), else Step 3, hot deck within industry (0)	ER65193
Head, Spouse & OFUM Business	0	0	Step 1, Use BC/DE Self Employment Income (0), else Step 2, Prior year's income if same industry (0), else Step 3, hot deck within industry (0)	ER65193
Rent Head	515	35	Overall Median	ER65218
Dividend Head	1017	182	Overall Median	ER65220
Interest Head	3421	733	Overall Median	ER65222
Trust Head	82	5	Overall Median	ER65224
Rent Spouse	163	5	Overall Median	ER65246
Dividends Spouse	433	65	Overall Median	ER65248
Interest Spouse	1908	383	Overall Median	ER65250
Trust Spouse	15	1	Overall Median	ER65252
OFUM Labor Income	1749	588	Overall Median (within Job #)	ER65318
OFUM Interest	27	2	Overall Median	ER65320
OFUM ADC	9	4	Overall Median	ER65323
OFUM SSI	145	12	Overall Median	ER65325
OFUM Welfare	22	4	Overall Median	ER65327
OFUM Veterans	11	2	Overall Median	ER65329
OFUM Pension	58	19	Overall Median	ER65331
OFUM Unemp	7	3	Overall Median	ER65333
OFUM Workers Comp	0	0	Overall Median	ER65335
OFUM Child Support	32	11	Overall Median	ER65337
OFUM Relatives	24	0	Overall Median	ER65339
OFUM Other	52	4	Overall Median	ER65341

Social Security	2885	244	Overall Median	ER65344, ER65346, ER65348
Head Alimony	27	2	Overall Median	ER65277
Head Annuity	95	13	Overall Median	ER65265
Head Child Support	371	14	Overall Median	ER65275
Head Help Non Rel	278	14	Overall Median	ER65281
Head Help Rel	895	57	Overall Median	ER65279
Head IRA	181	13	Overall Median	ER65267
Head Other	176	14	Overall Median	ER65283
Head Other Retirement	3	1	Overall Median	ER65269
Head Retire.	818	52	Overall Median	ER65263
Head SSI	249	19	Overall Median	ER65257
Head TANF	94	4	Overall Median	ER65255
Head Unemp	279	4	Overall Median	ER65271
Head VA Pension	293	15	Overall Median	ER65261
Head Welfare	46	1	Overall Median	ER65259
Head Workers Comp	77	4	Overall Median	ER65273
Spouse Alimony	2	0	Overall Median	ER65307
Spouse Annuity	22	3	Overall Median	ER65295
Spouse Child Support	181	5	Overall Median	ER65305
Spouse Help Non Rel	19	0	Overall Median	ER65311
Spouse Help Rel	161	6	Overall Median	ER65309
Spouse IRA	63	10	Overall Median	ER65297
Spouse Other	67	8	Overall Median	ER65313
Spouse Other Retirement	1	0	Overall Median	ER65299
Spouse Retirement	271	13	Overall Median	ER65293
Spouse SSI	39	5	Overall Median	ER65287
Spouse TANF	24	3	Overall Median	ER65285
Spouse Unemp	104	1	Overall Median	ER65301
Spouse VA Pension	26	4	Overall Median	ER65291
Spouse Welfare	11	0	Overall Median	ER65289
Spouse Workers Comp	11	0	Overall Median	ER65303