

**A Panel Study of Income Dynamics:
1968-2023 Relationship Matrix File Documentation
(Release 1)**

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Section I: Overview of the 1968-2023 Relationship Matrix File

The 1968-2023 Relationship Matrix File is designed to synthesize all available relationship data collected in the 1968 through 2023 waves of the Panel Study of Income Dynamics (PSID). The file describes the relationship between each individual living in a PSID Family Unit (FU) and every other individual in the same FU in each wave from 1968 to 2023.

Each set of records for a specified individual contains his or her relationship to every member of the FU in a given wave. At each wave, only individuals who were currently living in the FU at the time of the interview, sequence numbers from 1-20, were included in the file.

The number of variables are few; they contain relevant identifiers for the FU in each wave, identifiers for the individual (Ego) and the compared FU member (Alter), the relationship between them, and their respective relationships to the household reference person.

The 1968-2023 Relationship Matrix File stores information in an efficient manner that allows a high degree of flexibility in linking with the PSID's Individual File. It is designed to be linked to the 1968-2023 Individual File.

How to Obtain the File and Whom to Contact with Questions

The 1968-2023 Relationship Matrix File is available online:

<http://simba.isr.umich.edu/Zips/ZipMain.aspx>

If you have questions that are not answered by this documentation, contact PSID staff through our website:

http://psidonline.isr.umich.edu/Guide/Contact_Us.aspx

Section II: Structure of the File

Number of Records

The 1968-2023 Relationship Matrix File contains a total of 3,485,034 records. This file contains a matrix of every individual living in a PSID FU compared to every individual in that FU for each wave. In each wave, every individual in the FU is assigned in turn as the EGO individual and is compared to every member of the FU, who is designated the ALTER individual. Each record contains coded identifying information and the coded relationship between the two individuals.

Individuals in a one-person FU will have one observation for that year, comparing the EGO individual to themselves as the ALTER. For FUs with more than one person, every individual has multiple records for that wave. The number of records is dependent on the number of individuals in the FU in that wave, to allow a record for every EGO compared to every ALTER. Specifically, the number of records in a given FU at a given wave is equal to the squared number of individuals in that FU with a sequence number between 1 and 20.

Sort Order of the File

The 1968-2023 Relationship Matrix File is sorted, in ascending order, by "Interview Year" (MX2), "Interview Number" (MX3), "Ego Sequence Number" (MX4), and "Alter Sequence Number" (MX9). Individuals are compared through the FU in their sequence number order. All records for the first member of the FU are followed by those for the next FU member. When all of the records for all FU members are exhausted, records for FU members in the next interview for that wave follow.

Variables on the File

The 1968-2023 Relationship Matrix File contains twelve variables, which can be categorized into those relevant to the FU as a whole, those specific to the individual (EGO), those specific to the compared FU member (ALTER), and the relationship between them.

Other information:

MX1 Release Number

Information specific to the FU:

MX2 Interview Year

MX3 Interview Number

Information specific to the individual (Ego):

MX4 Ego Sequence Number

MX5 Ego 1968 Interview Number

MX6 Ego Person Number

MX7 Ego Relationship to Reference Person

Information specific to the compared FU member (Alter):

MX9 Alter Sequence Number

MX10 Alter 1968 Interview Number

MX11 Alter Person Number

MX12 Alter Relationship to Reference Person

Information specific to the Ego-Alter relationship:

MX8 Ego Relation to Alter

Section III: Idiosyncrasies, File Cleaning and Variable Detail

We have tried very hard to assure access to all available information while also recording occurrences of missing data or unclear identification of relationships. The relationship matrix utilizes the reported Relationship to Reference Person (RRP), as well as all data available in the Parent Information File (PID), Marital History File, and Childbirth-Adoption History File, to determine the relationship between the Ego and Alter individuals.

For many individuals, we do have a variety of family history data reported, on the PID, Childbirth-Adoption History, and/or Marital History files. However, many individuals, especially those who were only present in early waves of PSID, or who have never been a Reference Person or Spouse/Partner in a study family, may not have any family history data reported. In all cases

where family history data was available, it was used along with the reported RRP to code the Ego-Alter relationship. For individuals for whom no family history data was available, only the RRP was used to code the Ego-Alter relationship.

In the creation of the Relationship Matrix file, we found inconsistencies between the RRP and the known family history data for a small number of cases. PSID staff attempted to identify all data inconsistencies, and reconcile them using a review of all data sources.

Section IV: Linking Records

The Relationship Matrix is designed to be linked to PSID Individual data for analysis purposes. The Relationship Matrix File consists only of identifiers for Ego and Alter, plus the relationship between them. 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 2023 Relationship Matrix File to individual data, only the 1968-2023 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 and the 1968-2023 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 Interview Number" and "Person Number" (e.g., MX5 and MX6 for the Ego individual). 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 Relationship Matrix File for whom matches are attempted.

Individuals vary substantially in terms of which years they have been present in PSID family units over the course of the study. Even though all individuals in the Relationship Matrix File also have records on the 1968-2023 Individual File, the latter file does not necessarily contain data for them for all years of the study. Some individuals first entered the study in, e.g., 1990, and thus only have data since that year. Others have logged more than 40 years of inclusion in the study.

The Relationship Matrix file contains data for all individuals who were living in a family unit at each wave. Just like on the Individual File, individuals may have records in some waves but not in other waves, depending upon their status in the FU. Except for a small group of individuals who were selected into the original PSID sample but were then found to be deceased or institutionalized by the time of the original interview, all individuals that appear in the 1968-2023 Individual File will have records in the Relationship Matrix file, which correspond to the years that they were current FU members. For more details about PSID tracking procedures and classification of people into family units, see the discussion in Section 8 on "Family Composition and Change", p. 55, in A

PANEL STUDY OF INCOME DYNAMICS: A USER'S GUIDE, by Martha Hill (Sage Publications, 1992).

Section V: Codebook

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

The codeframe for the Ego-Alter relationship is similar to the codeframe for Relationship to Reference Person (RRP), which is included in the Individual File. However, it includes additional codes to classify relationships that currently are not identified in the RRP codeframe. These include social relationships between two individuals who are brought into coresidence in the context of a cohabiting union, rather than a marital union, and stepfamily relationships beyond stepparent, stepchild, and stepsibling. We describe these extensions below.

Social relationships

Social relationships occur when two individuals are living together in a romantic nonmarital relationship (i.e., cohabitation or a cohabiting union) and the FU includes at least one other person who is related by blood, adoption, or marriage to one member of the cohabiting couple. A social relationship describes the Ego-Alter relationship between a given individual and the other member of the cohabiting couple or two individuals who are each related to a different member of the cohabiting couple. For example, if one member of a cohabiting couple has a biological child from a prior union in the household, that child is a *social child* to the other member of the cohabiting couple. The other member of the cohabiting couple is a *social parent* to that child. If each member of a cohabiting couple has their own child from a prior union, those children are *social siblings* to each other. The structure of social relationships is identical to relationships formed through marriage. They are distinct only in that the members of social relationships are connected through a cohabiting union instead.

Stepfamily relationships

The RRP codeframe includes stepparent, stepchild, and stepsibling relationships. The universe of stepfamily relationships has been extended in the relationship matrix to include step-grandchild/step-grandparent, and step-great-grandchild/step-great-grandparent. The codeframe does not identify stepfamily relationships between aunt and uncles/nieces and nephews or cousins.

Undetermined relationships

Relationships between some Ego-Alter pairs could not be determined definitively after reviewing all available data. Approximately 0.08% of Ego-Alter pairs have been coded as sharing an undetermined relationship.