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

Panel Study of Income Dynamics

Wave 37 Questionnaire

2011

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

1. R IS HEAD/WIFE/"WIFE"	5. ALL OTHERS	→ GO TO A4
↓		

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

1. Completely satisfied	2. Very satisfied	3. Somewhat satisfied
4. Not very satisfied	5. Not at all satisfied	

A4. Do [*R=FU MEMBER*: you / *R=PROXY*: they] live in a one-family house, a two-family house, an apartment, a mobile home, or what?
- IF R answers "condo," PROBE for type of dwelling

1. One-family	2. Two-family; duplex	3. Apartment; project	4. Mobile home; trailer
6. Row house; town house	7. Other-specify	→ A4SPEC. Please specify. (String 100)	

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

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

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

1. Yes	5. No	→ GO TO A8

↓

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

APARTMENT/PROJECT OR OTHER	ALL OTHERS	→ GO TO A8
↓		

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

1. Yes	5. No

A8. How many rooms do [*R=FU MEMBER*: you / *R=PROXY*: they] have [*CYEAR FU COUNT>1*: for [*R=FU MEMBER*: your / *R=PROXY*: their] family] not counting bathrooms?
- [*HU/CS IN FU*: Remind R not to include rooms used by HU or HUCS people]
- CODE 1 – 19=Actual number of rooms
- CODE 20=Twenty or <u>more </u>rooms
- CODE 00=FU shares a one-room HU with non-FU persons

0 – 20

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

1. Any FU member owns or is buying (fully or jointly)	5. FU pays rent	8. FU neither owns nor rents	*DK/RF NOT ALLOWED*
	GO TO A31	GO TO A34	

↓

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

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

↓

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

1. Yes		5. No	DK/RF	→ GO TO A20F RULE

↓ (under 1. Yes)   ↓ (under 5. No)

A20B. (Would it amount to)   A20D. (Would it amount to)

$200,000 or more? $75,000 or more?

1. Yes	5. No	DK/RF		1. Yes	5. No	DK/RF

↓   GO TO A20F RULE   GO TO A20F RULE   ↓   GO TO A20F RULE

A20C. (Would it amount to)   A20E. (Would it amount to)

$400,000 or more? $25,000 or more?

1. Yes	5. No	DK/RF		1. Yes	5. No	DK/RF

↓   ↓

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

FU LIVES IN MOBILE HOME	ALL OTHERS	→ GO TO A21
↓		

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

1. Yes	5. No	→ GO TO A21

↓

A20G. How much do [*R=FU MEMBER*: you / *R=PROXY*: they] pay to rent the lot?
- ENTER amount here, then ENTER unit of time on next screen (Week, Two weeks, Month, Year)

$ 0 – 99,997	DK/RF	→ GO TO A20H

↓

A20GPER. The amount entered is: [A20G] per _____
- SELECT the unit of time below

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

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

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

| 1. Yes | 5. No |

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

| $ 0 – 99,997 |

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

| $ 0 – 9,997 |

Mortgage Block

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

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

↓

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

| 1. Mortgage | 2. Land contract, loan from seller | 3. Home equity | 4. Home improvement | 5. Line of credit loan |
| | | 7. Other-specify | → A23ASPEC. Please specify. (String 100) |

↓ GO TO A24

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

| 1. Original | 2. Refinance |

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

| $ 0 – 9,999,997 |

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

| $ 0 – 99,997 |

A25A1 (A29). Does this amount include property taxes?

| 1. Yes | 5. No |

A25A2 (A30). Does it (this mortgage or loan payment) include insurance premiums?

| 1. Yes | 5. No |

A25A3 (A25A1). Is the interest rate on that mortgage or loan fixed or variable?

| 1. Fixed | 2. Variable |

A25A4 (A25A). What is the current interest rate on that loan?

| 0 – 65 |

> A25A4 SOFT CHECK (SUPPRESS=continue, CLOSE/GOTO= A25A4)
> IF A25A4 = 25+:
>   You have entered interest rate = [A25A4] %
>   --If this is not correct, go back to A25A4 and enter correct amount.
>   --If this is correct, click [SUPPRESS] to continue.

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

0. [A25A].0	1. [A25A] 1/8 or [A25A].125	2. [A25A] 1/4 or [A25a].25
3. [A25A] 3/8 or [A25A].375	4. [A25A] 1/2 or [A25A].5	5. [A25A] 5/8 or [A25A].625
6. [A25A] 3/4 or [A25A].75	7. [A25A] 7/8 or [A25A].875	
8. Other-specify	→ A25BSPEC. Please specify. (String 100)	

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

1901 – [CYEAR]

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

1 – 97

A27A (A27FOR1). [*1ST MTGE*: Some people have had difficulties recently making their mortgage or loan payments. / *2nd MTGE*: (Some people have had difficulties recently making their mortgage or loan payments.)] Are [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or anyone in your family living there] / *R=PROXY*: they [*CYEAR FU COUNT>1*: or anyone in the family living there]], currently behind on [*R=FU MEMBER*: your / *R=PROXY*: their] [*A23A=MORTGAGE*: mortgage / *ALL OTHERS*: loan] payments [*2nd MTGE*: (for this [*A23A=MORTGAGE*: mortgage / *ALL OTHERS*: loan])]?

1. Yes   5. No   → GO TO A27F

↓

A27B (A27FOR2). How many months are [*R=FU MEMBER*: you / *R=PROXY*: they] behind?

1 – 97

A27C (A27FOR3). Has [*R=FU MEMBER*: your / *R=PROXY*: their] bank or lender started the process of foreclosing on [*R=FU MEMBER*: your / *R=PROXY*: their] home?

1. Yes   5. No   → GO TO A27F

↓

A27D (A27FOR4MO). In what month and year did the foreclosure start?
- SELECT Month and [Enter] to go to next screen for year

1. January	2. February	3. March	4. April
5. May	6. June	7. July	8. August
9. September	10. October	11. November	12. December
21. Winter	22. Spring	23. Summer	24. Fall

A27E (A27FOR4YR). (In what month and year did the foreclosure start?)
- ENTER a year from [*REINT*: [P2YEAR] / *SO, RECON, RECSO*: 2001] to [CYEAR]

[*REINT*: [P2YEAR] / *SO, RECON, RECSO*: 2001] – [CYEAR]

A27F (A27FOR5). Have [*R=FU MEMBER*: you / *R=PROXY*: they] worked with [*R=FU MEMBER*: your / *R=PROXY*: their] bank or lender to restructure or modify [*R=FU MEMBER*: your / *R=PROXY*: their] [*A23A=MORTGAGE*: mortgage / *ALL OTHERS*: loan] [*A27A=YES*: because of missed payments]?

1. Yes   5. No

A27G (A27FOR6). How likely is it that [*R=FU MEMBER*: you / *R=PROXY*: they] [*A27F1=YES*: will continue to be behind / *ALL OTHERS*: will fall behind] on [*R=FU MEMBER*: your / *R=PROXY*: their] [*A23A=MORTGAGE*: mortgage / *ALL OTHERS*: loan] payments in the next 12 months? Would you say very likely, somewhat likely, or not likely at all?

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

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

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

Note: A29/A30 moved into mortgage block after A25 and renamed A25A1/A25A2
End Mortgage Block

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

| FU PAYS RENT | | ALL OTHERS | → GO TO A34 RULE
↓

A31. About how much rent do [*R=FU MEMBER*: you / *R=PROXY*: they] pay a month [*A4=MOBILE*:, including rent for the lot]?
- [*HU/CS IN FU*: IF FU lives with non-FU members, PROBE: Is that only for [*R=FU MEMBER*: your / *R=PROXY*: their] (FU's) share of the rent?]
- [*FU LIVES IN MOBILE HOME*: If FU owns the lot, do not include the value of the lot]
- ENTER amount here, then ENTER unit of time on next screen (Week, Two weeks, Month, Year)

| $ 1 – 99,997 | | DK/RF | → GO TO A31C RULE
↓

A31PER. The rent amount entered is: [A31] per _____
- SELECT the unit of time below

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

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

| FU LIVES IN MOBILE HOME | | ALL OTHERS | → GO TO A31B
↓

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

| 1. Yes | | 5. No |

A31B (A31A). Is this [*A4=APT*: apartment / *A4=MOBILE*: mobile home / *ALL OTHERS*: house] rented fully furnished?

| 1. Yes | | 5. No |

A31C (A31B). Is heating included in [*R=FU MEMBER*: your / *R=PROXY*: their] monthly rent?

| 1. Yes | | 5. No |

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

| 1. Yes | → GO TO A37A | 5. No |

↓

A33. Are [*R=FU MEMBER*: you / *R=PROXY*: they] paying lower rent because a Federal, State, or local government housing program is paying part of the cost?
($[A31] per [A31PERWK])

| 1. Yes | 5. No |

End Renters Block

Neither Owns Nor Rents Block (A19=8)
A34 RULE. WHETHER OWNS (A19=1), RENTS (A19=5) OR NEITHER OWNS NOR RENTS (A19=8)

| FU NEITHER OWNS NOR RENTS | ALL OTHERS | → GO TO A37A |

↓

A34. How is that? (Could you tell me a little more about [*R=FU MEMBER*: your / *R=PROXY*: their] situation?)
| String 400 |

A35. How much would it rent for if it were rented?
- [*HU/CS IN FU*: IF FU lives with non-FU members, PROBE: Would that be only for [*R=FU MEMBER*: your / *R=PROXY*: their] (FU's) share of the rent?]
- ENTER amount here, then ENTER unit of time on next screen (Week, Two weeks, Month, Year)

| $ 1 – 9,997 | DK/RF | → GO TO A36

↓

A35PER. The rent amount entered is: [A35] per _____
- SELECT the unit of time below

| 3. Week | 4. Two weeks | 5. Month | 6. Year |
| 7. Other-specify | → A35PERSPEC. Specify. (String 100) |

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

| 1. Yes | → GO TO A37A | 5. No |

↓

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

| 1. Yes | 5. No |

End NONR Block

A37A (A37FOR1). [*A27C=YES*: Other than the foreclosure experience we just talked about, since / *A27C≠YES*: Since] [*REINT*: our last interview in [P2YEAR] ([PYIWDATE]), / *SO, RECON, RECSO*: January 1, 2001,]] [have / has] [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or anyone in your family living there] / *R=PROXY* & *CYEAR FU COUNT=1*: they / *R=PROXY* & *CYEAR FU COUNT>1*: anyone in the family living there] ever owned a home on which a foreclosure was started?

| 1. Yes | 5. No | → GO TO A42

↓

A37B (A37FOR2MO). In what month and year did the foreclosure start?

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

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December
21. Winter	22. Spring	23. Summer	24. Fall		

A37C (A37FOR2YR). (In what month and year did the foreclosure start?)

- ENTER a year from [*REINT*: [P2YEAR] / *SO, RECON, RECSO*: 2001] to [CYEAR]

[*REINT*: [P2YEAR] / *SO, RECON, RECSO*: 2001] – [CYEAR]

A37D (A37FOR3). Was the home foreclosed upon?

1. Yes   5. No   → GO TO A37F
↓

A37E (A37FOR4). Did [*R=FU MEMBER*: you / *R=PROXY*: they] lose [*R=FU MEMBER*: your / *R=PROXY*: their] home as a result of this foreclosure?

1. Yes   5. No

A37F (A37FOR5). Was this home [*R=FU MEMBER*: your / *R=PROXY*: their] main residence, investment property, a vacation home or what?

1. Main residence   2. Investment property   3. Vacation home / condo
7. Other-specify   → A37FSPEC (A37FOR5SPEC). Please specify. (String 255)

A37G (A37FOR6). About how much did [*R=FU MEMBER*: you / *R=PROXY*: they] still owe on [*R=FU MEMBER*: your / *R=PROXY*: their] mortgage or loan when the foreclosure started?

$ 1 – 9,999,997

A37H (A37FOR7). Since [*REINT*: our last interview in [P2YEAR] ([PYIWDATE]), / *SO, RECON, RECSO*: January 1, 2001,] was there another home that [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or anyone in your family living there] / *R=PROXY* & *CYEAR FU COUNT=1*: they / *R=PROXY* & *CYEAR FU COUNT>1*: anyone in the family living there] owned on which a foreclosure was started?

1. Yes   → REPEAT A37B–A37G; MAX=2;   5. No
THEN GO TO A42   ↓

NOTE: A40 has been moved, it now follows A45 series.

A42 (A42_1). The next few questions are about [*R=FU MEMBER*: your / *R=PROXY*: their] utilities.

Do [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: and your family living there] / *R=PROXY*: they [*CYEAR FU COUNT>1*: and their family living there]] pay for gas or other types of fuel and electricity on one bill?

- IF "YES": Would you be able to separate those amounts?

1. Yes, and R is able to separate amounts	2. Yes, but R **cannot** separate amounts	5. No, gas and electric are not combined, or FU does not use gas, or utilities included in rent	DK/RF
↓	GO TO A42C	↓	

A42A (A41). How much do [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: and your family living there] / *R=PROXY*: they [*CYEAR FU COUNT>1*: and their family living there]] usually pay for gas or other types of fuel per month on average?

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

$ 0   → GO TO A42B $ 1 – 9,997   DK/RF   → GO TO A42B
↓

A42APER (A41PER). The amount entered is: [A42A] per _____
- SELECT the unit of time below

| 5. Month | 6. Year |

7. Other-specify → A42APERSPEC (A41PERSPEC). Please specify (String 100)

A42B (A42). (How much do [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: and your family living there] / *R=PROXY*: they [*CYEAR FU COUNT>1*: and their family living there]] usually pay…)
For electricity per month?
- [*HU/CS IN FU*: Remind R not to include amounts paid by HU or HUCS people]
- ENTER amount here, then ENTER unit of time on next screen (Month, Year)

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

A42BPER (A42PER). The amount entered is: [A42B] per _____
- SELECT the unit of time below

| 5. Month | 6. Year |

7. Other-specify → A42BPERSPEC (A42PERSPEC). Please specify (String 100)

GO TO A43 RULE

A42C (A42A). How much do [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: and your family living there] / *R=PROXY*: they [*CYEAR FU COUNT>1*: and their family living there]] usually pay for electricity and gas or other types of fuel **combined**?
- [*HU/CS IN FU*: Remind R not to include amounts paid by HU or HUCS people]
- ENTER amount here, then ENTER unit of time on next screen (Month, Year)

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

A42CPER (A42APER). The amount entered is: [A42C] per ___
- SELECT the unit of time below

| 5. Month | 6. Year |

7. Other-specify → A42CPERSPEC (A42APERSPEC). Please specify (String 100)

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

SEWER/WATER INCLUDED → GO TO A44   ALL OTHERS
↓

A43. (How much do [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: and your family living there] / *R=PROXY*: they [*CYEAR FU COUNT>1*: and their family living there]] usually pay…)
For water and sewer per month?
- [*HU/CS IN FU*: Remind R not to include amounts paid by HU or HUCS people]
- ENTER amount here, then ENTER unit of time on next screen (Quarter, Month, Year)

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

A43PER. The amount entered is: [A43] per _____
- SELECT the unit of time below

| 4. Quarter | 5. Month | 6. Year | 7. Other-specify | → A43PERSPEC. Please specify (String 100)

A44. (How much do [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: and your family living there] / *R=PROXY*: they [*CYEAR FU COUNT>1*: and their family living there]] usually pay…)
For telephone, including cell phone, cable or satellite TV, and internet service per month?
- [*HU/CS IN FU*: Remind R not to include amounts paid by HU or HUCS people]
- ENTER amount here, then ENTER unit of time on next screen (Month, Year)

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

↓

A44PER. The amount entered is: [A44] per ____
- SELECT the unit of time below

| 5. Month | 6. Year | 7. Other-specify | → A44PERSPEC. Please specify (String 100)

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

| 1. Yes | 5. No | → GO TO A46 |

↓

A45A. What were those other utilities expenses?

| String 100 |

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

| \$ 1 – 997 | DK/RF | → GO TO A40 |

↓

A45BPER. The amount entered is: [A45B] per ____
- SELECT the unit of time below

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

NOTE: A40 previously asked before A42 (A42_1).

A40. How is [*R=FU MEMBER*: your / *R=PROXY*: their] [*A4=APT*: apartment / *A4=MOBILE*: mobile home / *ALL OTHERS*: home] heated – with gas, electricity, oil or what?
- ENTER all that apply
- PROBE: Any others?

| 1. Gas | 2. Electricity | 3. Oil | 4. Wood | 5. Coal | 6. Solar | 10. Bottled gas; propane | 11. Kerosene |
| 97. Other-specify | → A40SPEC. Please specify. (String 100)

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

| 1. Yes | 5. No | → GO TO A47CKPT |

↓

A46A. About how much did that amount to altogether?

| \$ 1 – 9,997 |

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

| 1. R IS PROXY | → GO TO SECTION BC | 5. ALL OTHERS |
| ↓ |

A47A. Now, I have a few questions about the availability and use of computers in your home during the last year. [Do / Does] [you / HEAD / WIFE/"WIFE"] have a computer or laptop that [you / he / she] can use **in your home**? Including any computers [you / he / she] might bring home to do work related to [your / his / her] job?

     1. Yes   5. No   → GO TO A47C

       ↓

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

         1. Yes   → GO TO A47 RULE   5. No

                                     ↓

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

         1. Yes   5. No

A47 RULE. WHETHER WIFE/"WIFE" IN FU (CYFUHU=1, 4 & CYAQRTH=202, 222)

     WIFE/"WIFE" IN FU   → ASK A47A–A47C FOR WIFE/"WIFE";   ALL OTHERS   → GO TO SECTION BC
                                   THEN GO TO SECTION BC

Section BC: Employment of Head

BCDE1. We would like to know about what [you / HEAD] [do / does] – [are / is] [you / HEAD] working now, looking for work, retired, keeping house, a student, or what?
- ENTER all that apply
- PROBE: Any others?
- If R says "Unemployed", PROBE: Is [HEAD] looking for work?
  - If unemployed and looking for work, ENTER [3]
  - If unemployed and not looking for work, ENTER [6]

| 1. Working now | 2. Only temporarily laid off, sick or maternity leave | 3. Looking for work, unemployed |

4. Retired → BCDE2. In what year did [you / HEAD] retire? (1901 – [CYEAR])

GO TO EHCINTRO

5. Disabled, permanently or temporarily

6. Keeping house

7. Student

8. Other-specify → BCDE1SPEC. Specify (String 100)

↓

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

1. Yes → GO TO EHCINTRO   5. No

↓

BCDE3A. [Have / Has] [you / HEAD] done any work for money since January 1, [P2YEAR]? Please include any type of work, no matter how small.

1. Yes   5. No

EHCINTRO. Next, I will be asking you about [*BCDE1=1, 2 OR BCDE3=YES OR BCDE3A=YES*: jobs [you / HEAD] had / *ALL OTHERS*: what [you / HEAD] [have / has] done] and places [you / HEAD] [have / has] lived during the past two years.
- ENTER [1] to go into [HEAD's] employment EHC

1. Continue

Begin Head Employment EHC

Residence Timeline–Enter Up To 6 Addresses: Asked in Head EHC only, about Head's residence status.

Residence Domain.
1. What is the street address and move-in date of [your / HEAD's] current residence?
2. [Have / Has] [you / HEAD] lived anywhere else since January [P2YEAR]? IF YES: Please tell me the address of each of those residences and the dates [you / HEAD] lived there.
   PROBE for full address
   If R says "Homeless", ENTER [Homeless] in the Address field for that timeline

ADDRESS	CITY	STATE	ZIP	COUNTRY
String 200	String 200	String 200	String 200	String 200

SMONTHSEASON. Starting Month / Season
EMONTHSEASON. Ending Month / Season

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December
21. Winter	22. Spring	23. Summer	24. Fall	DK	

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

| 1 – 31 | 41. First third | 42. Middle third | 43. Last third | DK |

SYEAR. Starting Year
EYEAR. Ending Year

| [P2YEAR] – [CYEAR] |

| Before [P2YEAR] | → Enter Year 1901 – [P3YEAR] | 1901– [P3YEAR]) |

| 9997. Before [P2YEAR], DK Exact Year |

| 9998. [P2YEAR] – [CYEAR], DK Which Year |

RESIDENCE FOLLOW-UP

| PAST RESIDENCE | CURRENT RESIDENCE |
| ↓ | ↓ |

A50. Why did [you / HEAD] move?
- If "Homeless", DO NOT READ question - SELECT [9]
- ENTER all that apply
- PROBE: Any other reasons?

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

A51. Do you think [you / HEAD] might move in the next couple of years?

| 1. Yes, might or maybe | 5. No | → DONE
↓

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

| 1. Definitely |
| 2. Probably |
| 3. More uncertain |

A53. Why [will / might] [you / HEAD] move?

| String 200 |

Employment Timeline –Enter Up To 10 Jobs

Employment Domain.
I'd like to know about all of the work for money that [you / HEAD] [have / has] done since January 1, [P2YEAR]. Please include self-employment and any other kind of work that [you / HEAD] [have / has] done for pay. Start with any job that [you / HEAD] had during this time.
1. What (is / was) the name of this employer?
2. When did [you / HEAD] start and when did [you / HEAD] stop working for this employer? Please give me all of [your / HEAD's] start and stop dates if [you / HEAD] [have / has] worked for (yourself / himself / herself / this employer) more than once.
    IF NECESSARY: This information will help us to process employment information you gave us. The name itself will never be released as part of data from the study.
    IWER: If no employer name is given by R, ask for job title or anything that can help identify the job.
    IWER: Before exiting timelines, probe for any other work for pay, no matter how small.

| EMPLOYER |
String 100

SMONTHSEASON. Starting Month / Season
EMONTHSEASON. Ending Month / Season

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December
21. Winter	22. Spring	23. Summer	24. Fall	DK	

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

| 1 – 31 | 41. First third | 42. Middle third | 43. Last third | DK |

SYEAR. Starting Year
EYEAR. Ending Year

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

Time Away Timeline –Enter Up To 5 Lines For Each of 5 TA Types

Time Away Domain.
We're interested in time [you / HEAD] spent away from work last year, during [PYEAR].
1. Did [you / HEAD] miss any work because someone else was sick? (When was that?)
2. (Did [you / HEAD] miss any work) because [you / HEAD] [were / was] sick? (When was that?)
3. (Did [you / HEAD] miss any work) for a vacation or time off? (When was that?)
4. (Did [you / HEAD] miss any work) because [you / HEAD] [were / was] on strike? (When was that?)
5. (Did [you / HEAD] miss any work) because [you / HEAD] [were / was] temporarily laid off from work? (When was that?)
> PROBE each Time Away: Any others?
> IF DK WHEN, CHECK "Don't Know When" box, THEN ASK: How much work did [you / HEAD] miss in [PYEAR]?
> 1. Yes   5. No

REASON. Reason for Time Away
> 1. Someone else sick   2. Own sick   3. Vacation   4. On strike   5. Temporary layoff

SMONTHSEASON. Starting Month / Season
EMONTHSEASON. Ending Month / Season

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December
21. Winter	22. Spring	23. Summer	24. Fall	DK	

SDAY. Starting Day / 3rd of Month
EDAY. Ending Day / 3rd of Month
> 1 – 31   41. First third   42. Middle third   43. Last third   DK

SYEAR. Starting Year
EYEAR. Ending Year
> [PYEAR]

TIME AWAY RULE

[DK WHEN] SELECTED OR (START OR END MONTH/SEASON=DK) OR (START MONTH/SEASON=END MONTH/SEASON AND START OR END DAY/3rd OF MONTH=DK)	ALL OTHERS
	GO TO NEXT TIMELINE
↓	

DKWHENMONTHS   0 – 12   DK
DKWHENWEEKS   0 – 3   DK
DKWHENDAYS   0 – 31   DK

Not Working Timeline –Enter Up To 5 Lines For Each of 4 NW Types

Not Working Domain.
Were there any times during [P2YEAR] and [PYEAR] when [you / HEAD] [were / was] not working at all for pay?
IF YES, ask the following questions:
1. Was there any time in [P2YEAR] or [PYEAR] when [you / HEAD] did <u>not</u> have a job and [were / was] <u>looking</u> for work? (When was that?)
2. (Was there any time in [P2YEAR] or [PYEAR]) when [you / HEAD] did <u>not</u> have a job and [were / was] <u>not looking</u> for work? (When was that?)
   IF DK WHEN, CHECK "Don't Know When" box, THEN ASK: How much time was that (in [P2YEAR] / [PYEAR])?
   | 1. Yes | 5. No |

LOOKNOT. Type of Not Working
   | 1. Looking | 2. Not looking |

SMONTHSEASON. Starting Month / Season
EMONTHSEASON. Ending Month / Season

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December
21. Winter	22. Spring	23. Summer	24. Fall	DK	

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

1 – 31	41. First third	42. Middle third	43. Last third	DK

SYEAR. Starting Year
EYEAR. Ending Year
   | [P2YEAR] | [PYEAR] |

NOT WORKING RULE

[DK WHEN] SELECTED OR (START OR END MONTH/SEASON=DK) OR (START MONTH/SEASON=END MONTH/SEASON AND START OR END DAY/3rd OF MONTH=DK)	ALL OTHERS
	GO TO NEXT TIMELINE

↓

DKWHENMONTHS	0 – 12	DK
DKWHENWEEKS	0 – 3	DK
DKWHENDAYS	0 – 31	DK

End Head Employment EHC

BCDE14ACKPT. CAI CHECKPOINT: WHETHER HEAD HAD JOB PYEAR (EMPLOYEHC1.EMPLOYSECTION.BCWTRPY);
WHETHER PYEAR WEEKS WORKED (EMPLOYEHC1.ROUNDED) CAN BE COMPUTED
(EMPLOYEHC1.BCDEDKJOBSPY)

1. NO JOBS [PYEAR]	3. CAN'T COMPUTE WEEKS WORKED	5. ALL OTHERS
GO TO BCDE14DCKPT	GO TO BCDE14B	↓

BCDE14A. <u>EMPLOYMENT SUMMARY</u>
1-10. [EMPLOYER] *(List of all PYEAR Employers from Employment EHC)*
From the information you have given me on [*2 JOBS*: both of / *>2 JOBS*: all of] [your / HEAD's] [*1 JOB*: job / *2+ JOBS*: jobs], [you / he / she] [were / was] employed approximately [#WEEKS] out of 52 weeks in [PYEAR]. Does this sound correct?

1. Yes	→ GO TO BCDE14BB	5. No	DK/RF

↓

BCDE14B. <u>EMPLOYMENT SUMMARY</u>
1-10. [EMPLOYER] *(List of all PYEAR Employers from Employment EHC)*
Thinking about [your / HEAD's] work in [PYEAR], how many weeks did [you / he / she] actually work on [*2+ JOBS*: all of] [your / his / her] [*1 JOB*: job / *2+ JOBS*: jobs] in [PYEAR], not counting time off for vacations, sick time, unemployment, etc.?

0	→ GO TO BCDE14C	1 – 52	DK/RF

↓

BCDE14BB. <u>EMPLOYMENT SUMMARY</u>
1-10. [EMPLOYER] *(List of all PYEAR Employers from Employment EHC)*
On average, how many hours a week did [you / he / she] work on [*2+ JOBS*: all of] [your / his / her] [*1 JOB*: job / *2+ JOBS*: jobs] during [PYEAR]?

1 – 112	DK/RF	→ GO TO BCDE14DCKPT

↓

BCDE14B3. Did [you / he / she] work any overtime **which isn't included in that**?

1. Yes	5. No	DK/RF
↓	GO TO BCDE14DCKPT	

BCDE14B4. How many hours did that overtime amount to (on [*2+ JOBS*: all of] [your / his / her] [*1 JOB*: job / *2+ JOBS*: jobs] in [PYEAR])?
- ENTER amount here, then ENTER unit of time on next screen (Week, Two weeks, Month, Year)

1 – 3760	DK/RF	→ GO TO BCDE14DCKPT

↓

BCDE14B4PER. The amount entered is: [BCDE14B4] per _____
- SELECT the unit of time below

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

7. Other-specify	→ BCDE14B4PERSPEC. Specify. (String 100)

GO TO BCDE14DCKPT

BCDE14C. IWER: The EHC indicates that [HEAD] had a job in [PYEAR], but BCDE14B is '00' for total weeks worked in [PYEAR]. Please explain why.
EMPLOYMENT SUMMARY
1-10. [EMPLOYER] *(List of all PYEAR Employers from Employment EHC)*

String 500

BCDE14DCKPT. CAI CHECKPOINT: WHETHER HEAD HAD JOB P2YEAR (EMPLOYEHC1. EMPLOYSECTION.BCWTRP2Y); WHETHER P2YEAR WEEKS WORKED (EMPLOYEHC1.ROUNDED2) CAN BE COMPUTED (EMPLOYEHC1.BCDEDKJOBSPPY)

1. NO JOBS [P2YEAR]	3. CAN'T COMPUTE WEEKS WORKED	5. ALL OTHERS
GO TO BC15CKPT	GO TO BCDE14E	↓

BCDE14D. EMPLOYMENT SUMMARY
1-10. [EMPLOYER] *(List of all P2YEAR Employers from Employment EHC)*
For the year before last, [P2YEAR], from the information you have given me on [*2 JOBS*: both of / *3+ JOBS*: all of] [your / HEAD's] [*1 JOB*: job / *2+ JOBS*: jobs], [you / he / she] [were / was] employed approximately [#WEEKS] out of 52 weeks in [P2YEAR]. Does this sound correct?

1. Yes → GO TO BCDE14EE   5. No   DK/RF
↓

    BCDE14E. EMPLOYMENT SUMMARY
    1-10. [EMPLOYER] *(List of all P2YEAR Employers from Employment EHC)*
    Thinking about [your / HEAD's] work in [P2YEAR], how many weeks did [you / he / she] actually work on [*2+ JOBS*: all of] [your / his / her] [*1 JOB*: job / *2+ JOBS*: jobs] in [PYEAR], not counting time off for vacations, sick time, unemployment, etc.?

    0 → GO TO BCDE14F   1 – 52   DK/RF
    ↓

BCDE14EE. EMPLOYMENT SUMMARY
1-10. [EMPLOYER] *(List of all P2YEAR Employers from Employment EHC)*
On average, how many hours a week did [you / he / she] work on [*2+ JOBS*: all of] [your / his / her] [*1 JOB*: job / *2+ JOBS*: jobs] during [P2YEAR]?

1 – 112   DK/RF
GO TO BC15CKPT

BCDE14F. IWER: The EHC indicates that [HEAD] had a job in [P2YEAR], but BCDE14E is '00' for total weeks worked in [P2YEAR]. Please explain why.
EMPLOYMENT SUMMARY
1-10. [EMPLOYER] *(List of all P2YEAR Employers from Employment EHC)*

String 500

BLAISE "BC" QUESTIONS ARE FOR HEAD IN FU: CYFUFU=1, 4 AND CYAQRTH=101, 102;
INCLUDE AQSN ON ALL OUTPUT FILES FROM THIS SECTION. VARNAME=BCAQSN.

<u>EXPORTED DUMMIES FROM EHC:</u>
BCWTRWRK ....WHETHER WORKED SINCE 1/1/P2YEAR
BCWTRWRK=1 ....IF BCDE3=0, 1
BCWTRWRK=0 ....IF BCDE3=5, DK, RF

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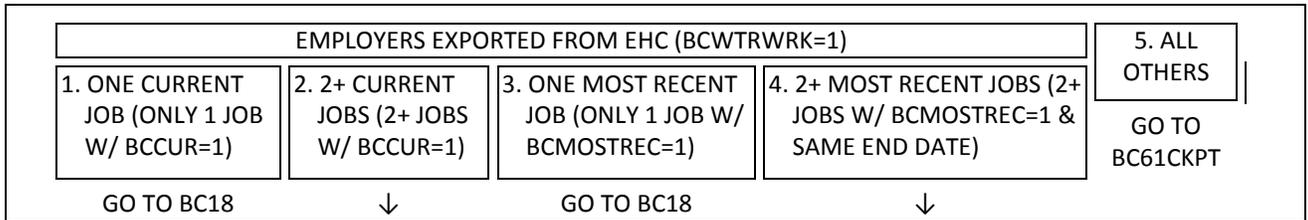   CODES=[1, 0]

<u>PYEAR OVERALL INDICATORS FOR ASKING "GROUP" WEEKS, HOURS AND OVERTIME QUESTIONS:</u>
EmployEHC1.BCDEDKJOBSP1Yr ....CAN'T COMPUTE WEEKS WORKED (BCDE14B=0, DK/RF)
EmployEHC1.BCDEDKHoursP1YR=1.............................CAN'T COMPUTE HOURS PER WEEK WORKED (BCDE14B=0 OR
                                                                                    BCDE14BB=DK/RF)
EmployEHC1.BCDEDKOTP1YR=1.................................CAN'T COMPUTE OVERTIME WORKED (BCDE14B=0 OR
                                                                                    BCDE14BB=DK/RF OR BCDE14B3=DK/RF OR BCDE14B4=DK/RF)

<u>P2YEAR OVERALL INDICATORS FOR ASKING "GROUP" WEEKS AND HOURS QUESTIONS:</u>
EmployEHC1.BCDEDKJobsP2YR=1 ....CAN'T COMPUTE WEEKS WORKED (BCDE14E=0, DK/RF)
EmployEHC1.BCDEDKHoursP2YR=1.............................CAN'T COMPUTE HOURS PER WEEK WORKED (BCDE14E=0 OR
                                                                                    BCDE14EE=DK/RF)

BC15CKPT. CAI CHECKPOINT: HEAD JOB INDICATORS (BCWTRWRK, HEADJOBS.BCCUR & HEADJOBS.BCMOSTREC)

EMPLOYERS EXPORTED FROM EHC (BCWTRWRK=1)				5. ALL OTHERS
1. ONE CURRENT JOB (ONLY 1 JOB W/ BCCUR=1)	2. 2+ CURRENT JOBS (2+ JOBS W/ BCCUR=1)	3. ONE MOST RECENT JOB (ONLY 1 JOB W/ BCMOSTREC=1)	4. 2+ MOST RECENT JOBS (2+ JOBS W/ BCMOSTREC=1 & SAME END DATE)	GO TO BC61CKPT
GO TO BC18	↓	GO TO BC18	↓	

BC16. You have just told me that [you / HEAD] [are / is] working now for more than one employer. Which one of these jobs do you consider to be [your / his / her] main job? • READ list of employers/jobs if needed 1 – 10. LIST OF EMPLOYERS *DK, RF NOT ALLOWED* ASSIGN SELECTION BC18.JOBTYPE=CMJ	BC17. You mentioned [NUMBER OF JOBS] jobs that ended at the same time. Which one of these jobs do you consider to have been [your / his / her] main job? • READ list of employers/jobs if needed 1 – 10. LIST OF EMPLOYERS *DK, RF NOT ALLOWED* ASSIGN SELECTION BC18.JOBTYPE=MRMJ

BC Jobs Block

BC18. JOBS BLOCK (ID'S=AQCASE, AQSN, JOBNUM)

JOBNUM	1 – 10
EMPNAME	String 100
JOBTYPE	1. CMJ Current Main Job 2. MRMJ Most recent Main Job 3. Other Job

BC19CKPT. CAI CHECKPOINT: WHETHER HEAD WORKED THIS JOB P2YEAR-CYEAR (HEADJOBS.BCWTRP2YEAR=1 OR
HEADJOBS.BCWTRP1YEAR=1 OR HEADJOBS.BCWTRCYEAR=1)

> 1. WORKED THIS JOB DURING [P2YEAR] – [CYEAR]   5. ALL OTHERS → GO TO BC52CKPT
> ↓

BC20. EMPLOYER: [BCEmpName] ([BCBegMo/BCBegYr] – [BCEndMo/BCEndYr])

[*FIRST ITERATION*: Now I have a few questions about each of the jobs you have told me about.]
In [your / his / her] work for [BCEMPNAME] ([BCBEGMO/BCBEGYR] – [BCENDMO/BCENDYR]), what [is / was]
[your / HEAD'S] occupation [*JOB IS NOT CURRENT*: when [you / he / she] left that employer]? What sort of work
[do / does / did] [you / he / she] do? What [are / were] [your / his / her] most important activities or duties?

Open end

BC21. EMPLOYER: [BCEmpName] ([BCBegMo/BCBegYr] – [BCEndMo/BCEndYr])

What kind of business or industry [is / was] that in?

Open end

BC21ACKPT. CAI CHECKPOINT: WHETHER THIS JOB IS CMJ (BC18.JOBTYPE=CMJ)

> 1. CMJ   5. ALL OTHERS → GO TO BC21BCKPT
> ↓

BC21A. EMPLOYER: [BCEmpName] ([BCBegMo/BCBegYr] – [BCEndMo/BCEndYr])

What is the official title of [your / HEAD's] job? (The title that [your / his / her] employer uses.)

String 200

BC21BCKPT. CAI CHECKPOINT: WHETHER THIS JOB IS CMJ (BC18.JOBTYPE =CMJ) OR MRMJ WORKED IN PYEAR
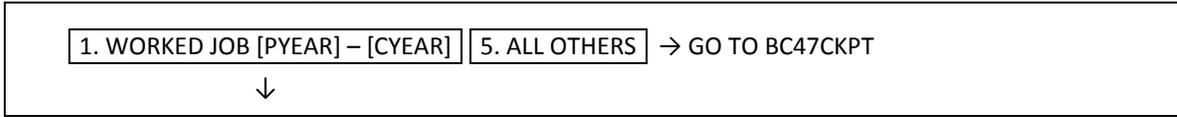(BC18.JOBTYPE=MRMJ & HEADJOBS.BCWTRP1YEAR=1)

> 1. CMJ; PYEAR MRMJ   5. ALL OTHERS → GO TO BC22CKPT
> ↓

BC21B. EMPLOYER: [BCEmpName] ([BCBegMo/BCBegYr] – [BCEndMo/BCEndYr])

On a typical day, how many minutes [*CMJ*: is / *MRMJ*: was] [your / his / her] round trip commute to and from work?
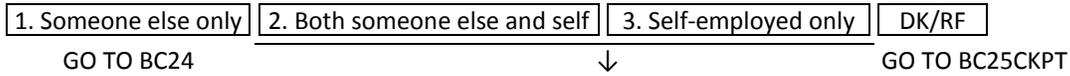- If R says "it varies", ENTER [996]
- If R says "doesn't commute" (e.g. self-employed, works from home), ENTER [997]

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

BC22CKPT. CAI CHECKPOINT: WHETHER HEAD WORKED THIS JOB PYEAR-CYEAR (HEADJOBS.BCWTRP1YEAR=1 OR
HEADJOBS.BCWTRCYEAR=1)

```
┌─────────────────────────────────────────────────────────────────────────────────┐
│   1. WORKED JOB [PYEAR] – [CYEAR]    5. ALL OTHERS   → GO TO BC47CKPT              │
│                    ↓                                                               │
└─────────────────────────────────────────────────────────────────────────────────┘
```
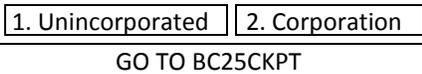
BC22. EMPLOYER: [BCEmpName] ([BCBegMo/BCBegYr] – [BCEndMo/BCEndYr])
[Are / Were / Is / Was] [you / HEAD] self-employed, [are / were / is / was] [you / he / she] employed by someone
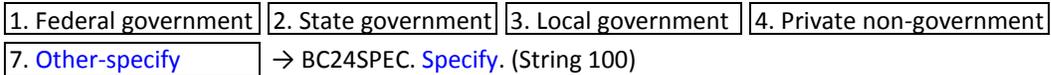else, or what?

1. Someone else only   2. Both someone else and self   3. Self-employed only   DK/RF
   GO TO BC24   ↓   GO TO BC25CKPT

BC23. EMPLOYER: [BCEmpName] ([BCBegMo/BCBegYr] – [BCEndMo/BCEndYr])
[Is / Was] that an unincorporated business or a corporation?

1. Unincorporated   2. Corporation
   GO TO BC25CKPT

BC24. EMPLOYER: [BCEmpName] ([BCBegMo/BCBegYr] – [BCEndMo/BCEndYr])
[Do / Did] [you / HEAD] work for the federal, state, or local government, a private company, or what?
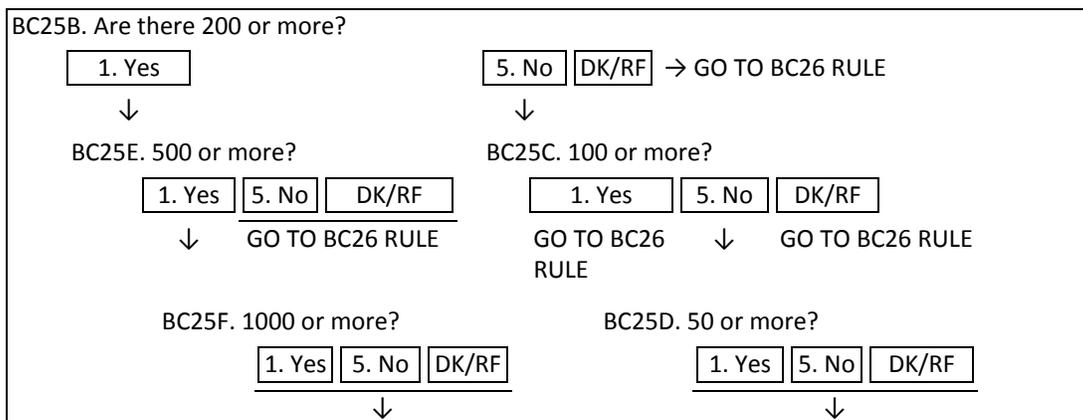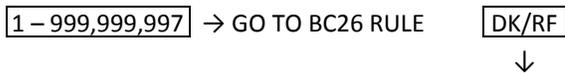
1. Federal government   2. State government   3. Local government   4. Private non-government
7. Other-specify   → BC24SPEC. Specify. (String 100)

BC25CKPT. CAI CHECKPOINT: WHETHER HEAD WORKS FOR SOMEONE ELSE (BC22=1) OR SELF/BOTH/DK/RF (BC22=2, 3,
DK/RF) ON CMJ (BC18.JOBTYPE=CMJ)

```
┌─────────────────────────────────────────────────────────────────────────────────┐
│   1. CMJ, WORKS FOR          2. CMJ, WORKS FOR SELF,      5. ALL OTHERS  → GO TO BC42CKPT │
│      SOMEONE ELSE               BOTH, OR DK/RF                                     │
│                    ↓                                                               │
└─────────────────────────────────────────────────────────────────────────────────┘
```

BC25A. EMPLOYER: [BCEmpName] ([BCBegMo/BCBegYr] – [BCEndMo/BCEndYr])
About how many people are employed by [you / BCEMPNAME] at the location where [you / HEAD] work[s]?

1 – 999,999,997   → GO TO BC26 RULE   DK/RF
                                             ↓

```
┌─────────────────────────────────────────────────────────────────────────────────┐
│ BC25B. Are there 200 or more?                                                     │
│       1. Yes                            5. No   DK/RF   → GO TO BC26 RULE          │
│         ↓                                 ↓                                        │
│       BC25E. 500 or more?               BC25C. 100 or more?                        │
│         1. Yes   5. No   DK/RF            1. Yes    5. No    DK/RF                  │
│           ↓       GO TO BC26 RULE        GO TO BC26   ↓    GO TO BC26 RULE         │
│                                          RULE                                      │
│       BC25F. 1000 or more?              BC25D. 50 or more?                         │
│         1. Yes   5. No   DK/RF            1. Yes   5. No   DK/RF                    │
│           ↓                                ↓                                       │
└─────────────────────────────────────────────────────────────────────────────────┘
```

BC26 RULE. WHETHER HEAD WORKS FOR SOMEONE ELSE (BC22=1) ON CMJ (BC18.JOBTYPE=CMJ)

CMJ, WORKS FOR SOMEONE ELSE	ALL OTHERS
↓	↓

BC26. EMPLOYER: [BCEmpName] ([BCBegMo/BCBegYr]–
   [BCEndMo/BCEndYr])
   Is [your / his / her] current job covered by a union contract?

   | 1. Yes | 5. No | → GO TO BC28A

   ↓

BC27. EMPLOYER: [BCEmpName] ([BCBegMo/BCBegYr] –
   [BCEndMo/BCEndYr])
   [Do / Does] [you / HEAD] belong to that labor union?

   | 1. Yes | 5. No |

BC28. Interviewer Checkpoint: IS HEAD A
   FARMER OR RANCHER?

   | 1. Yes | 5. No |

   GO TO BC28A

BC28A. EMPLOYER: [BCEmpName] ([BCBegMo/BCBegYr]–[BCEndMo/BCEndYr])
   And would you say [your / his / her] work requires the use of a computer – **All** of the time, **Most** of the time,
   Some of the time, or **None** of the time?

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

BC29. EMPLOYER: [BCEmpName] ([BCBegMo/BCBegYr]–[BCEndMo/BCEndYr])
   On [your / his / her] main job for [BCEMPNAME]] ([BCBEGMO/BCBEGYR] – [BCENDMO/BCENDYR]),) [are / is]
   [you / HEAD] salaried, paid by the hour, or what?

   | 1. Salaried | 2. Salary + commission | | 3. Paid by hour | 4. Hourly + tips | 6. Hourly + commission |

   GO TO BC30   GO TO BC33

   | 7. Other | DK/RF | → GO TO BC40CKPT

   ↓

BC38. EMPLOYER: [BCEmpName] ([BCBegMo/BCBegYr]–[BCEndMo/BCEndYr])
   How is that?

   | 1. Piecework, hourly + piecework/ production | 2. Commission |
   | 5. Self-employed, farmer, "profits" – draw on account | 6. By the job/day/mile |

   | 7. Other-specify | → BC38OS. Specify (String 500)

BC39. EMPLOYER: [BCEmpName] ([BCBegMo/BCBegYr]–[BCEndMo/BCEndYr])
   If [you / he / she] worked an extra hour, how much would [you / he / she] earn for that hour?
   • PER hour
   | $ 0.00 – 999,997.99 |
   GO TO BC40CKPT

HEAD IS SALARIED (BC29=1, 2)
BC30. EMPLOYER: [BCEmpName] ([BCBegMo/BCBegYr]–[BCEndMo/BCEndYr])
How much is [your / his / her] salary?
- ENTER amount here, then ENTER unit of time on next screen (Week, Two weeks, Month, Year)

| $ 1.00 – 9,999,997.99 | DK/RF | → GO TO BC31

↓

BC30PER. EMPLOYER: [BCEmpName] ([BCBegMo/BCBegYr] – [BCEndMo/BCEndYr])
- The salary amount entered is: [BC30] per ____
- SELECT the unit of time below

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

| 7. Other-specify | → B30PERSPEC. Specify. (String 100)

BC31. EMPLOYER: [BCEmpName] ([BCBegMo/BCBegYr] – [BCEndMo/BCEndYr])
If [you / he / she] were to work more hours than usual during some week, would [you / he / she] get paid for those extra hours of work?

| 1. Yes | 5. No | → GO TO BC35CKPT

↓

BC32. EMPLOYER: [BCEmpName] ([BCBegMo/BCBegYr] – [BCEndMo/BCEndYr])
About how much would [you / he / she] make per hour for those extra hours?

| 1. Time and a half | 2. Double time | 3. Straight time | 4. Comp time | | 5. Exact amount-specify |

GO TO BC35CKPT ↓

BC32A. EMPLOYER: [BCEmpName] ([BCBegMo/BCBegYr] – [BCEndMo/BCEndYr])
- SPECIFY amount
- ENTER amount here, then ENTER unit of time on next screen (Hour, Day, Week, Two weeks, Month, Year)

| $ 1.00 – 9,999,997.99 | DK/RF | → GO TO BC35CKPT

↓

BC32APER. EMPLOYER: [BCEmpName] ([BCBegMo/BCBegYr] – [BCEndMo/BCEndYr])
- The amount entered is: [BC32A] per ____
- SELECT the unit of time below

| 1. Hour | 2. Day | 3. Week | 4. Two weeks | 5. Month | 6. Year |

| 7. Other-specify | → BC32APERSPEC. Specify. (String 100)

GO TO BC35CKPT

HEAD IS PAID BY THE HOUR (BC29=3, 4, 6)
BC33. EMPLOYER: [BCEmpName] ([BCBegMo/BCBegYr] – [BCEndMo/BCEndYr])
What is [your / his / her] hourly wage rate for [your / his / her] regular work time?
- PER hour

| $ 1.00 – 997.99 |

BC34. EMPLOYER: [BCEmpName] ([BCBegMo/BCBegYr] – [BCEndMo/BCEndYr])
What is [your / his / her] hourly wage rate for overtime?
- ENTER all that apply

| 1. Time and a half | 2. Double time | 3. Straight time | 4. Comp time | 5. Exact amount-specify |

| 7. Other-specify | → BC34SPEC. Specify other overtime wage rate. (String 100) | ↓

GO TO BC35CKPT

BC34A. EMPLOYER: [BCEmpName] ([BCBegMo/BCBegYr] – [BCEndMo/BCEndYr])
- SPECIFY overtime exact amount
- ENTER amount here, then ENTER unit of time on next screen (Hour, Day, Week, Two weeks, Month, Year)

| $ 1.00 – 9,999,997.99 | DK/RF | → GO TO BC35CKPT |

↓

BC34APER. EMPLOYER: [BCEmpName] ([BCBegMo/BCBegYr] – [BCEndMo/BCEndYr])
- The amount entered is: [BC34A] per _____
- SELECT the unit of time below

| 1. Hour | 2. Day | 3. Week | 4. Two Weeks | 5. Month | 6. Year |

| 7. Other-specify | → BC34APERSPEC. Specify. (String 100)

BC35CKPT. CAI CHECKPOINT: WHETHER HEAD GETS TIPS (BC29=4) OR COMMISSIONS (BC29=2, 6)

| 1. TIPS | | 2. COMMISSIONS | 5. ALL OTHERS | → GO TO BC40CKPT |
| ↓ | | ↓ | | |

BC36. EMPLOYER: [BCEmpName] ([BCBegMo/BCBegYr]–[BCEndMo/BCEndYr])
How much are [your / his / her] tips, on average?
- ENTER amount here, then ENTER unit of time on next screen (Hour, Day, Week, Two weeks, Month, Year)

| $ 1.00 – 99,997.99 | DK/RF | → GO TO BC40CKP

↓

BC36PER. EMPLOYER: [BCEmpName] ([BCBegMo/BCBegYr]–[BCEndMo/BCEndYr])
- The amount entered is: [BC36] per _____
- SELECT the unit of time below

| 1. Hour | 2. Day | 3. Week |
| 4. Two Weeks | 5. Month | 6. Year |
| 7. Other-specify | → BC36PERSPEC. Specify. (String 100)

BC37. EMPLOYER: [BCEmpName] ([BCBegMo/BCBegYr]– [BCEndMo/BCEndYr])
How much is [your / his / her] commission on average?
- ENTER amount here, then ENTER unit of time on next screen (Week, Two weeks, Month, Year)

| $ 1.00 – 99,997.99 | DK/RF | → GO TO BC40CKPT

↓

BC37PER. EMPLOYER: [BCEmpName] ([BCBegMo/BCBegYr]–[BCEndMo/BCEndYr])
- The amount entered is: [BC37] per _____
- SELECT the unit of time below

| 3. Week | 4. Two Weeks |
| 5. Monty | 6. Year |
| 7. Other-specify | → BC37ERSPEC. Specify. (String 100)

BC40CKPT. CAI CHECKPOINT: WHETHER HEAD WORKS FOR SOMEONE ELSE ONLY (BC22=1)

| 1. WORKS FOR SOMEONE ELSE | 5.ALL OTHERS | → GO TO BC42CKPT |
| ↓ | | |

BC41. EMPLOYER: [BCEmpName] ([BCBegMo/BCBegYr] – [BCEndMo/BCEndYr])
How many years' experience [do / does] [you / HEAD] have altogether with [your / his / her] present employer?
- USE Years for amounts given in whole years
- USE Months and Weeks for amounts less than one year
- USE 1 week for amounts of one week or less

YEARS | 1 – 50 |
MONTHS | 1 – 12 |
WEEKS | 1 – 52 |

BC42CKPT. CAI CHECKPOINT: WHETHER HEAD WORKED THIS JOB PYEAR (HEADJOBS.BCWTRP1YEAR=1); WHETHER
PYEAR WEEKS WORKED (EMPLOYEHC1.ROUNDED) CAN BE COMPUTED (EMPLOYEHC1.BCDEDKJOBSP1YR) OR
HOURS PER WEEK CAN BE COMPUTED (EMPLOYEHC1.BCDEDKHOURSP1YR)

WORKED JOB DURING P2YEAR		5. ALL OTHERS
MORE THAN ONE JOB (EMPLOYEHC1.BCDEWTRPYCOUNT)	4. ONE JOB	GO TO BC47CKPT
1. CAN'T COMPUTE WEEKS WORKED	WEEKS WORKED COMPUTED	GO TO BC46

1. CAN'T COMPUTE WEEKS WORKED

2. CAN'T COMPUTE HRS/WK WORKED

3. WKS & HRS/WK COMPUTED

↓   GO TO BC43   GO TO BC44 RULE
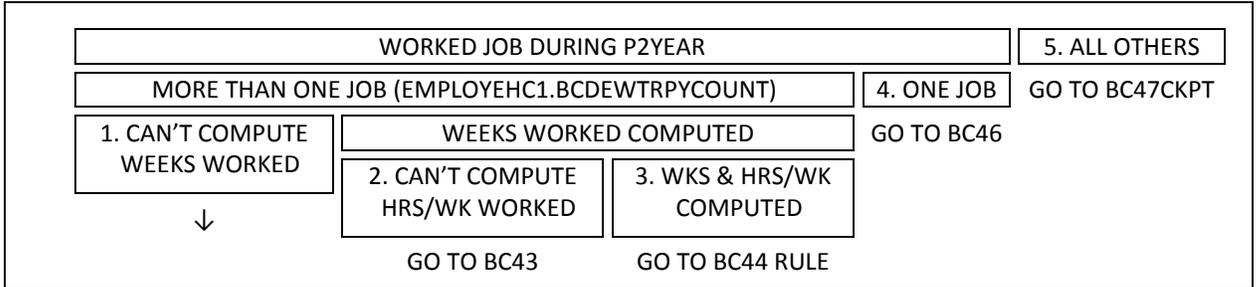
BC42A. EMPLOYER: [BCEmpName] ([BCBegMo/BCBegYr] – [BCEndMo/BCEndYr])
How many weeks out of the year did [you / HEAD] actually work on this job in [PYEAR], not including any time off
that you told me about earlier?
- IF R says "Every week except what (I / he / she) took off", ENTER [97]

1.0 – 52.0	97.0

*BC42A data used to calculate 'total weeks worked' and not included in public use data

BC43 RULE. WHETHER PYEAR HOURS PER WEEK CAN BE COMPUTED (EMPLOYEHC1.BCDEDKJOBSP1YR)

CAN'T COMPUTE HRS PER WK	ALL OTHERS	→ GO TO BC44 RULE

↓

BC43. EMPLOYER: [BCEmpName] ([BCBegMo/BCBegYr] – [BCEndMo/BCEndYr])
((And) the job with [BCEMPNAME] ([BCBEGMO/BCBEGYR] – [BCENDMO/BCENDYR]),…)
On average, how many hours a week did [you / he / she] work on this job in [PYEAR]?

1 – 112

BC44 RULE. WHETHER PYEAR OVERTIME CAN BE COMPUTED (EMPLOYEHC1.BCDEDKOTP1YR)

CAN'T COMPUTE OVERTIME	ALL OTHERS	→ GO TO BC46

↓
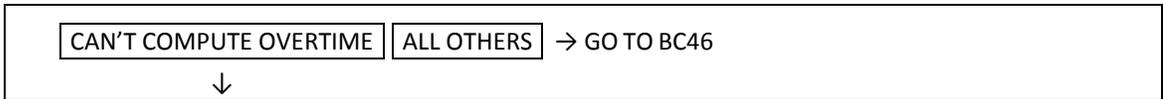
BC44. EMPLOYER: [BCEmpName] ([BCBegMo/BCBegYr] – [BCEndMo/BCEndYr])
((And) the job with [BCEMPNAME] ([BCBEGMO/BCBEGYR] – [BCENDMO/BCENDYR]),…)
Did [you / he / she] work any overtime [*HRS/WK COMPUTED BUT OT NOT COMPUTED*: (on this job in [PYEAR]) /
HRS/WK & OT NOT COMPUTED: **which isn't included in that**]?

1. Yes	5. No	→ GO TO BC46

↓

BC45. EMPLOYER: [BCEmpName] ([BCBegMo/BCBegYr] – [BCEndMo/BCEndYr])
How many hours did that overtime amount to in (that period during) [PYEAR]?
- ENTER amount here, then ENTER unit of time on next screen (Week, Two weeks, Month, Year)
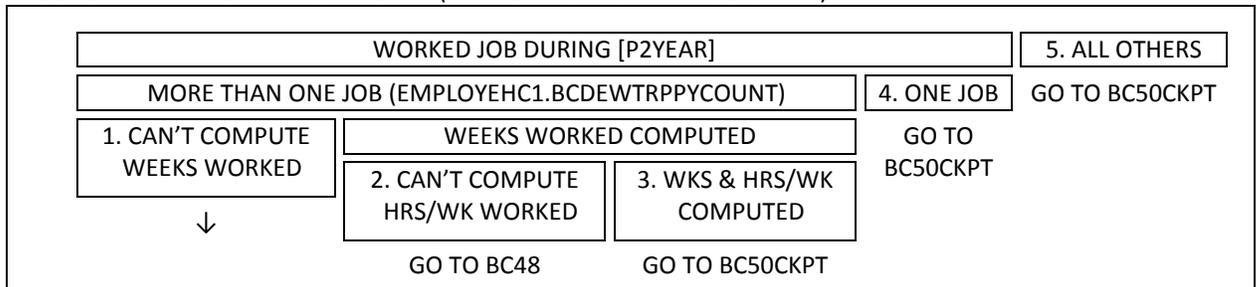
1 – 3760	DK/RF	→ GO TO BC46

↓

BC45PER. EMPLOYER: [BCEmpName] ([BCBegMo/BCBegYr] – [BCEndMo/BCEndYr])
- The amount entered is: [BC45] per _____
- SELECT the unit of time below

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

| 7. Other-specify | → BC45PERSPEC. Specify. (String 100)

BC46. EMPLOYER: [BCEmpName] ([BCBegMo/BCBegYr] – [BCEndMo/BCEndYr])
About how much did [you / he / she] make at this job in [PYEAR]?
- ENTER amount here, then ENTER unit of time on next screen (Hour, Day, Week, Two weeks, Month, Year)

| $ 1.0 – 9,999,997.99 | DK/RF | → GO TO BC47CKPT
↓

BC46PER. EMPLOYER: [BCEmpName] ([BCBegMo/BCBegYr] – [BCEndMo/BCEndYr])
- The amount entered is: [BC46] per _____
- SELECT the unit of time below

| 1. Hour | 2. Day | 3. Week | 4. Two Weeks | 5. Month | 6. Year |

| 7. Other-specify | → BC46PERSPEC. Specify. (String 100)

BC47CKPT. CAI CHECKPOINT: WHETHER HEAD WORKED THIS JOB P2YEAR (HEADJOBS.BCWTRP2YEAR=1); WHETHER
P2YEAR WEEKS WORKED (EMPLOYEHC1.ROUNDED2) CAN BE COMPUTED (EMPLOYEHC1.BCDEDKJOBSP2YR) OR
HOURS PER WEEK CAN BE COMPUTED (EMPLOYEHC1.BCDEDKHOURSP2YR)

WORKED JOB DURING [P2YEAR]		5. ALL OTHERS
MORE THAN ONE JOB (EMPLOYEHC1.BCDEWTRPPYCOUNT)	4. ONE JOB	GO TO BC50CKPT
1. CAN'T COMPUTE WEEKS WORKED	WEEKS WORKED COMPUTED	GO TO BC50CKPT
	2. CAN'T COMPUTE HRS/WK WORKED	3. WKS & HRS/WK COMPUTED	
↓	GO TO BC48	GO TO BC50CKPT	

BC47A. EMPLOYER: [BCEmpName] ([BCBegMo/BCBegYr] – [BCEndMo/BCEndYr])
((And) the job with [BCEMPNAME] ([BCBEGMO/BCBEGYR] – [BCENDMO/BCENDYR]),…)
How many weeks out of the year did [you / HEAD] actually work on this job in [P2YEAR] ?
- IF R says "Every week except what (I / he / she) took off", ENTER [97]

| 1.0 – 52.0 | 97.0 |

BC48 RULE. WHETHER P2YEAR HOURS PER WEEK CAN BE COMPUTED (EMPLOYEHC1.BCDEDKHOURSP2YR)

| CAN'T COMPUTE HRS PER WK | ALL OTHERS | → GO TO BC50CKPT
↓
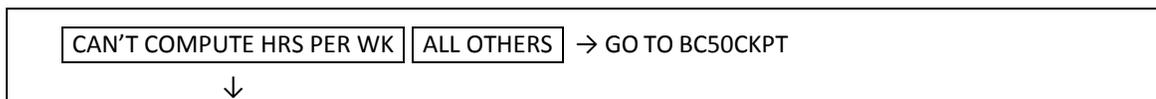
BC48. EMPLOYER: [BCEmpName] ([BCBegMo/BCBegYr] – [BCEndMo/BCEndYr])
((And) the job with [BCEMPNAME] ([BCBEGMO/BCBEGYR] – [BCENDMO/BCENDYR]),…)
On average, how many hours a week did [you / he / she] work on this job in [P2YEAR] ?

| 1 – 112 |

BC50CKPT. CAI CHECKPOINT: WHETHER HEAD STOPPED THIS JOB DURING P2YEAR-CYEAR ((HEADJOBS.BCCUR=0) OR
(BC18.JOBTYPE=MRMJ) OR (BC18.JOBTYPE=OTHER AND HEADJOBS.BCCUR=0))

1. STOPPED JOB [P2YEAR] – [CYEAR]	5. ALL OTHERS	→ GO TO BC52CKPT
↓		

BC51. EMPLOYER: [BCEmpName] ([BCBegMo/BCBegYr] – [BCEndMo/BCEndYr])
((And) the job with [BCEMPNAME] ([BCBEGMO/BCBEGYR] – [BCENDMO/BCENDYR]),…)
Why did [you / he / she] stop working for [BCEMPNAME] ([BCBEGMO/BCBEGYR] – [BCENDMO/BCENDYR])]? Did
the company go out of business, [were / was] [you / he / she] laid off, did [you / he / she] quit, or what?

String 500

BC52CKPT. CAI CHECKPOINT: WHETHER HEAD HAS MORE JOBS

1. MORE JOBS FROM EHC	→ REPEAT BC19–BC51; MAX=10;	5. ALL OTHERS
	THEN GO TO BC61CKPT	↓

End BC Jobs Block

BC61CKPT. CAI CHECKPOINT: WHETHER HEAD DID NOT WORK AT ALL SINCE 1/1/P2YEAR (BCWTRWRK=0)

1. NO WORK SINCE 1/1/[P2YEAR]	5. ALL OTHERS	→ GO TO BC64
↓		

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

1. Yes	5. No	→ GO TO BC64

↓

BC63. MONTH. In what month and year did [you / he / she] last work?
- IF NECESSARY: What would be your best estimate?
- SELECT Month and [Enter] to go to next screen for year

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December
21. Winter	22. Spring	23. Summer	24. Fall		

BC63.YEAR. (In what month and year did [you / he / she] last work?)
Month, _____
- ENTER [9997] if before [P2YEAR] and DK exact year

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

BC64.   [Have / Has] [you / HEAD] been looking for [*BCDE1=1, 2 OR BCDE3=YES*: another job / *ALL OTHERS*: work] during the past four weeks?

| 1. Yes | 5. No | → GO TO SECTION DE

↓

BC65.   What [have / has] [you / he / she] been doing the last four weeks to find [*BCDE1=1, 2 OR BCDE3=YES*: another job / *ALL OTHERS*: work]?
- ENTER all that apply
- PROBE: Any others?
- IF R SAYS "Internet, website, on-line, on the computer" etc., PROBE: What did [you / HEAD] do – did [you / HEAD] contact employers or agencies, check out companies anonymously, answer or place ads, or what?

1. Checked with public employment agency	2. Checked with private employment agency
3. Checked with current employer directly	4. Checked with other employer directly
5. Checked with friends or relative	6. Placed or answered ads
7. Other-specify	→ BC65SPEC. Specify. (String 100)	8. Nothing

BC66CKPT. CAI CHECKPOINT: WHETHER HEAD DOES NOT HAVE CMJ (BC15CKPT=3, 4, 5)

| 1. NO CMJ | 5. ALL OTHERS | → GO TO SECTION DE

↓

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

YEARS	1 – 5 0
MONTHS	1 – 12
WEEKS	1 – 52

Section DE: Employment of Wife/"Wife"
Return to TOC

SECTION DE RULE. WHETHER WIFE/"WIFE" IN FU (CYFUHU=1, 4 & CYAQRTH=202, 222)

WIFE/"WIFE" IN FU	ALL OTHERS	→ GO TO SECTION F
↓		

BCDE1. We would like to know about what [you / WIFE/ "WIFE"] [do / does] – [are / is] [you / WIFE/ "WIFE"] working now, looking for work, retired, keeping house, a student, or what?
- ENTER all that apply
- PROBE: Any others?
- If R says "Unemployed", PROBE: Is [WIFE/ "WIFE"] looking for work?
  - If unemployed and <u>looking</u> for work, ENTER [3]
  - If unemployed and <u>not</u> looking for work, ENTER [6]

1. Working now	2. Only temporarily laid off, sick or maternity leave	3. Looking for work, unemployed

4. Retired → BCDE2. In what year did [you / HEAD] retire? (1901 – [CYEAR])

GO TO EHCINTRO

5. Disabled, permanently or temporarily

6. Keeping house

7. Student

8. Other-specify → BCDE1SPEC. Specify (String 100)

↓

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

1. Yes → GO TO EHCINTRO   5. No

↓

BCDE3A. [Have / Has] [you / WIFE/ "WIFE"] done any work for money since January 1, [P2YEAR] ? Please include any type of work, no matter how small.

1. Yes   5. No

EHCINTRO. Next, I will be asking you about [*BCDE1=1, 2 OR BCDE3=YES OR BCDE3A=YES*: jobs [you / WIFE/ "WIFE"] had / *ALL OTHERS*: what [you / WIFE/ "WIFE"] [have / has] done] during the past two years.
- ENTER [1] to go into [WIFE's/"WIFE's"] employment EHC

1. Continue

Begin Wife/"Wife"Employment EHC

Employment Timeline –Enter Up To 10 Jobs

Employment Domain.
 I'd like to know about all of the work for money that [you / WIFE/"WIFE"] [have / has] done since January 1, [P2YEAR].
Please include self-employment and any other kind of work that [you / WIFE/"WIFE"] [have / has] done for pay. Start with
any job that [you / WIFE/"WIFE"] had during this time.
1. What (is / was) the name of this employer?
2. When did [you / WIFE/"WIFE"] start and when did [you / WIFE/"WIFE"] stop working for this employer? Please give
      me all of [your / WIFE/"WIFE's"] start and stop dates if [you / WIFE/"WIFE"] [have / has] worked for (yourself
      / himself / herself / this employer) more than once.
      IF NECESSARY: This information will help us to process employment information you gave us. The name itself will
      never be released as part of data from the study.
      IWER: If no employer name is given by R, ask for job title or anything that can help identify the job.
      IWER: Before exiting timelines, probe for any other work for pay, no matter how small.

EMPLOYER.
String 100

SMONTHSEASON. Starting Month / Season
EMONTHSEASON. Ending Month / Season

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December
21. Winter	22. Spring	23. Summer	24. Fall	DK	

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

| 1 – 31 | 41. First third | 42. Middle third | 43. Last third | DK |

SYEAR. Starting Year

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

EYEAR. Ending Year

| [P2YEAR] – [CYEAR] |
| 9998. [P2YEAR] – [CYEAR], DK Which Year |

Time Away Timeline –Enter Up To 5 Lines For Each Of 5 TA Types

Time Away Domain.
We're interested in time [you / WIFE/"WIFE"] spent away from work last year, during [PYEAR].
1. Did [you / WIFE/"WIFE"] miss any work because someone else was sick? (When was that?)
2. (Did [you / WIFE/"WIFE"] miss any work) because [you / WIFE/"WIFE"] [were / was] sick? (When was that?)
3. (Did [you / WIFE/"WIFE"] miss any work) for a vacation or time off? (When was that?)
4. (Did [you / WIFE/"WIFE"] miss any work) because [you / WIFE/"WIFE"] [were / was] on strike? (When was that?)
5. (Did [you / WIFE/"WIFE"] miss any work) because [you / WIFE/"WIFE"] [were / was] temporarily laid off from work?
     (When was that?)
     PROBE EACH TIME AWAY: Any others?
     IF DK WHEN, CHECK "Don't Know When" box, THEN ASK: How much work did [you / WIFE/"WIFE"] miss in
     [PYEAR]?
     | 1. Yes | 5. No |

REASON. Reason for Time Away
     | 1. Someone else sick | 2. Own sick | 3. Vacation | 4. On strike | 5. Temporary layoff |

SMONTHSEASON. Starting Month / Season
EMONTHSEASON. Ending Month / Season

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December
21. Winter	22. Spring	23. Summer	24. Fall	DK	

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

| 1 – 31 | 41. First third | 42. Middle third | 43. Last third | DK |

SYEAR. Starting Year
EYEAR. Ending Year
     | [PYEAR] |

TIME AWAY RULE

[DK WHEN] SELECTED OR (START OR END MONTH/SEASON=DK) OR (START MONTH/SEASON=END MONTH/SEASON AND START OR END DAY/3rd OF MONTH=DK)	ALL OTHERS
	GO TO NEXT TIMELINE

     ↓

DKWHENMONTHS	0 – 12	DK
DKWHENWEEKS	0 – 3	DK
DKWHENDAYS	0 – 31	DK

Not Working Timeline–Enter Up To 5 Lines For Each of 4 NW Types

Not Working Domain.
Were there any times during [P2YEAR] and [PYEAR] when [you / WIFE/"WIFE"] [were / was] not working at all for pay?
IF YES, ask the following questions:
1. Was there any time in [P2YEAR] or [PYEAR] when [you / WIFE/"WIFE"] did <u>not</u> have a job and [were / was] <u>looking</u> for work? (When was that?)
2. (Was there any time in [P2YEAR] or [PYEAR]) when [you / WIFE/"WIFE"] did <u>not</u> have a job and [were / was] <u>not looking</u> for work? (When was that?)
    IF DK WHEN, CHECK "Don't Know When" box, THEN ASK: How much time was that (in [P2YEAR] / [PYEAR])?

1. Yes	5. No

LOOKNOT. Type of Not Working

1. Looking	2. Not looking

SMONTHSEASON. Starting Month / Season
EMONTHSEASON. Ending Month / Season

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December
21. Winter	22. Spring	23. Summer	24. Fall	DK	

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

1 – 31	41. First third	42. Middle third	43. Last third	DK

SYEAR. Starting Year
EYEAR. Ending Year

[P2YEAR]	[PYEAR]

NOT WORKING RULE

[DK WHEN] SELECTED OR (START OR END MONTH/SEASON=DK) OR (START MONTH/SEASON=END MONTH/SEASON AND START OR END DAY/3rd OF MONTH=DK)	ALL OTHERS
	GO TO NEXT TIMELINE

↓

DKWHENMONTHS	0 – 12	DK
DKWHENWEEKS	0 – 3	DK
DKWHENDAYS	0 – 31	DK

End Wife/"Wife" Employment EHC

BCDE14ACKPT. CAI CHECKPOINT: WHETHER WIFE/"WIFE" HAD PYEAR JOB
(EMPLOYEHC2.EMPLOYSECTION.DEWTRPY); WHETHER PYEAR WEEKS WORKED (EMPLOYEHC2.ROUNDED)
CAN BE COMPUTED (EMPLOYEHC2.BCDEDKJOBSPY)

1. NO JOBS [PYEAR]	3. CAN'T COMPUTE WEEKS WORKED	5. ALL OTHERS
GO TO BCDE14DCKPT	GO TO BCDE14B	↓

BCDE14A. EMPLOYMENT SUMMARY
1-10. [EMPLOYER] *(List of all PYEAR Employers from Employment EHC)*
From the information you have given me on [*2 JOBS*: both of / *3+ JOBS*: all of] [your / WIFE/"WIFE's"] [*1 JOB*: job / *2+ JOBS*: jobs], [you / she] [were / was] employed approximately [#WEEKS] out of 52 weeks in [PYEAR]. Does this sound correct?

1. Yes → GO TO BCDE14BB   5. No
↓

BCDE14B. EMPLOYMENT SUMMARY
1-10. [EMPLOYER] *(List of all PYEAR Employers from Employment EHC)*
Thinking about [your / WIFE/"WIFE's"] work in [PYEAR], how many weeks did [you / she] actually work on [*2+ JOBS*: all of] [your / her] [*1 JOB*: job / *2+ JOBS*: jobs] in [PYEAR], not counting time off for vacations, sick time, unemployment, etc.?

0 → GO TO BCDE14C   1 – 52
↓

BCDE14BB. EMPLOYMENT SUMMARY
1-10. [EMPLOYER] *(List of all PYEAR Employers from Employment EHC)*
On average, how many hours a week did [you / she] work on [*2+ JOBS*: all of] [your / her] [*1 JOB*: job / *2+ JOBS*: jobs] during [PYEAR]?

1 – 112   DK/RF → GO TO BCDE14DCKPT
↓

BCDE14B3. Did [you / she] work any overtime **which isn't included in that**?

1. Yes   5. No → GO TO BCDE14DCKPT
↓

BCDE14B4. How many hours did that overtime amount to (on [*2+ JOBS*: all of] [your / her] [*1 JOB*: job / *2+ JOBS*: jobs] in [PYEAR])?
- ENTER amount here, then ENTER unit of time on next screen (Week, Two weeks, Month, Year)

1 – 3760   DK/RF → GO TO BCDE14DCKPT
↓

BCDE14B4PER. The amount entered is: [BCDE14B4] per ____
- SELECT the unit of time below

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

7. Other-specify → BCDE14B4PERSPEC. Specify. (String 100)

GO TO BCDE14DCKPT

BCDE14C. IWER: The EHC indicates that [WIFE/"WIFE"] had a job in [PYEAR], but BCDE14B is '00' for total weeks worked in [PYEAR]. Please explain why.
EMPLOYMENT SUMMARY
1-10. [EMPLOYER] *(List of all PYEAR Employers from Employment EHC)*

String 500

BCDE14DCKPT. CAI CHECKPOINT: WHETHER WIFE/"WIFE" HAD JOB P2YEAR (EMPLOYEHC2. EMPLOYSECTION.DEWTRP2Y); WHETHER P2YEAR WEEKS WORKED (EMPLOYEHC2.ROUNDED2) CAN BE COMPUTED (EMPLOYEHC2.BCDEDKJOBSPPY)

1. NO JOBS [P2YEAR]	3. CAN'T COMPUTE WEEKS WORKED	5. ALL OTHERS
GO TO DE15CKPT	GO TO BCDE14E	↓

BCDE14D. EMPLOYMENT SUMMARY
1-10. [EMPLOYER] *(List of all P2YEAR Employers from Employment EHC)*
For the year before last, [P2YEAR], from the information you have given me on [*2 JOBS*: both of / *2+ JOBS*: all of] [your / WIFE/"WIFE's"] [*1 JOB*: job / *2+ JOBS*: jobs], [you / she] [were / was] employed approximately [#WEEKS] out of 52 weeks in [P2YEAR]. Does this sound correct?

1. Yes → GO TO BCDE14EE   5. No
↓

BCDE14E. EMPLOYMENT SUMMARY
1-10. [EMPLOYER] *(List of all P2YEAR Employers from Employment EHC)*
Thinking about [your / WIFE/"WIFE's"] work in [P2YEAR], how many weeks did [you / she] actually work on [*2+ JOBS*: all of] [your / her] [*1 JOB*: job / *2+ JOBS*: jobs] in [PYEAR], not counting time off for vacations, sick time, unemployment, etc.?

0 → GO TO BCDE14F   1 – 52
↓

BCDE14EE. EMPLOYMENT SUMMARY
1-10. [EMPLOYER] *(List of all P2YEAR Employers from Employment EHC)*
On average, how many hours a week did [you / she] work on [*2+ JOBS*: all of] [your / her] [*1 JOB*: job / *2+ JOBS*: jobs] during [P2YEAR]?

1 – 112   DK/RF
GO TO DE15CKPT

BCDE14F. IWER: The EHC indicates that [WIFE/"WIFE"] had a job in [P2YEAR], but BCDE14E is '00' for total weeks worked in [P2YEAR]. Please explain why.
EMPLOYMENT SUMMARY
1-10. [EMPLOYER] *(List of all P2YEAR Employers from Employment EHC)*

String 500

BLAISE "DE" QUESTIONS ARE FOR WIFE/"WIFE"IN FU: CYFUFU=1, 4 AND CYAQRTH=202, 222;
INCLUDE AQSN ON ALL OUTPUT FILES FROM THIS SECTION. VARNAME=DEAQSN.

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

FOR **EACH JOB**, WE GET:
WIFEJOBS.DEJOBNUM ....A SEQUENTIAL ID, THE MAX ALLOWED IS 10.
WIFEJOBS.DEEMPNAME.......EMPLOYER NAME, NEEDED FOR FILL/IWER REFERENCE;
WIFEJOBS.DEWTRP2YEAR ....WHETHER EMPLOYED DURING P2YEAR FOR THIS EMPLOYER-CODES=[1, 0];
WIFEJOBS.DEWTRP1YEAR ....WHETHER EMPLOYED DURING PYEAR FOR THIS EMPLOYER-CODES=[1, 0];
WIFEJOBS.DEWTRCYEAR ......WHETHER EMPLOYED DURING CYEAR FOR THIS EMPLOYER-CODES=[1, 0];
WIFEJOBS.DECUR ....WHETHER CURRENTLY WORKING FOR THIS EMPLOYER-CODES=[1, 0];
WIFEJOBS.DEMOSTREC ....WHETHER MOST RECENT EMPLOYER-CODES=[1, 0]; IF ANY JOB IS MARKED DECUR=1, THEN
DEMOSTREC IS ALWAYS [0] FOR ANY JOBS THAT HAVE ENDED;
WIFEJOBS.DEACCDATE ....WHETHER START (AND STOP DATE, IF APPLICABLE) ARE KNOWN TO MONTH LEVEL-
CODES=[1, 0]

PYEAR OVERALL INDICATORS FOR ASKING "GROUP" WEEKS, HOURS AND OVERTIME QUESTIONS:
EmployEHC2.BCDEDKJOBSP1Yr=1 ....CAN'T COMPUTE WEEKS WORKED (BCDE14B=0, DK/RF)
EmployEHC2.BCDEDKHoursP1YR=1............................CAN'T COMPUTE HOURS PER WEEK WORKED (BCDE14B=0 OR
BCDE14BB=DK/RF)
EmployEHC2.BCDEDKOTP1YR=1................................CAN'T COMPUTE OVERTIME WORKED (BCDE14B=0 OR
BCDE14BB=DK/RF OR BCDE14B3=DK/RF OR BCDE14B4=DK/RF)

P2YEAR OVERALL INDICATORS FOR ASKING "GROUP" WEEKS AND HOURS QUESTIONS:
EmployEHC2.BCDEDKJobsP2YR=1 ....CAN'T COMPUTE WEEKS WORKED (BCDE14E=0, DK/RF)
EmployEHC2.BCDEDKHoursP2YR=1............................CAN'T COMPUTE HOURS PER WEEK WORKED (BCDE14E=0 OR
BCDE14EE=DK/RF)

DE15CKPT. CAI CHECKPOINT: WIFE/"WIFE" JOB INDICATORS (DEWTRWRK, WIFEJOBS.DECUR, & WIFEJOBS.DEMOSTREC)

EMPLOYERS EXPORTED FROM EHC (DEWTRWRK=1)				5. ALL OTHERS
1. ONE CURRENT JOB (ONLY 1 JOB W/ DECUR=1)	2. 2+ CURRENT JOBS (2+ JOBS W/ DECUR=1)	3. ONE MOST RECENT JOB (ONLY 1 JOB W/ DEMOSTREC=1)	4. 2+ MOST RECENT JOBS (2+ JOBS W/ DEMOSTREC=1 & SAME END DATE)	GO TO DE61CKPT
GO TO DE18	↓	GO TO DE18	↓	
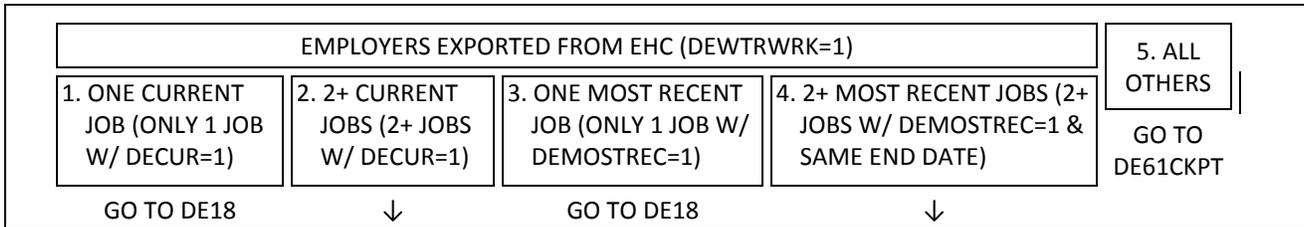
DE16. You have just told me that [you / WIFE/"WIFE"] [are / is] working now for more than one employer. Which one of these jobs do you consider to be [your / her] main job?
- READ list of employers/jobs if needed

1 – 10. LIST OF EMPLOYERS

DK, RF NOT ALLOWED

ASSIGN SELECTION DE18.JOBTYPE=CMJ

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

1 – 10. LIST OF EMPLOYERS

DK, RF NOT ALLOWED

ASSIGN SELECTION DE18.JOBTYPE=MRMJ

DE Jobs Block

DE18. JOBS BLOCK (ID'S=AQCASE, DEAQSN, DEJOBNUM)

| JOBNUM | 1 – 10 |
| EMPNAME | String 100 |

OBTYPE | 1. CMJ Current main Job | 2. MRMJ Most recent Main Job | 3. Other Job

DE19CKPT. CAI CHECKPOINT: WHETHER WIFE/"WIFE" WORKED THIS JOB P2YEAR-CYEAR (WIFEJOBS.DEWTRP2YEAR=1 OR WIFEJOBS.DEWTRP1YEAR=1 OR WIFEJOBS.DEWTRCYEAR=1)

1. WORKED THIS JOB DURING [P2YEAR] – [CYEAR] | 5. ALL OTHERS | → GO TO DE52CKPT
↓

DE20. EMPLOYER: [DEEmpName] ([DEBegMo/DEBegYr] – [DEEndMo/DEEndYr])
Now I have a few questions about each of the jobs you have told me about.
In [your / her] work for [DEEMPNAME] ([DEBEGMO/DEBEGYR] – [DEENDMO/DEENDYR]), what [is / was] [your / WIFE/"WIFE's"] occupation [*JOB IS NOT CURRENT*: when [you / she] left that employer]? What sort of work [do / does / did] [you / she] do? What [are / were] [your / her] most important activities or duties?

Open end

DE21. EMPLOYER: [DEEmpName] ([DEBegMo/DEBegYr] – [DEEndMo/DEEndYr])
What kind of business or industry [is / was] that in?

Open end

DE21ACKPT. CAI CHECKPOINT: WHETHER THIS JOB IS CMJ (DE18.JOBTYPE=CMJ)

1. CMJ | 5. ALL OTHERS | → GO TO DE21BCKPT
↓

DE21A. EMPLOYER: [DEEmpName] ([DEBegMo/DEBegYr] – [DEEndMo/DEEndYr])
What is the official title of [your / WIFE's/WIFE's"] job? (The title that [your / her] employer uses.)

String 200

DE21BCKPT. CAI CHECKPOINT: WHETHER THIS JOB IS CMJ (DE18.JOBTYPE=CMJ) OR MRMJ WORKED IN PYEAR, (DE18.JOBTYPE=MRMJ & WIFEJOBS.DEWTRP1YEAR=1)

1. CMJ; PYEAR MRMJ | 5. ALL OTHERS | → GO TO BC22CKPT
↓

DE21B. EMPLOYER: [DEEmpName] ([DEBegMo/DEBegYr] – [DEEndMo/DEEndYr])
On a typical day, how many minutes [*CMJ*: is / *MRMJ*: was] [your / her] round trip commute to and from work?
- If R says "it varies", ENTER [996]
- If R says "doesn't commute" (e.g. self-employed, works from home), ENTER [997]

1 – 900 | 996. It varies (VOL) | 997. No commute (VOL)

DE22CKPT. CAI CHECKPOINT: WHETHER WIFE/"WIFE"WORKED THIS JOB PYEAR-CYEAR (WIFEJOBS.DEWTRP1YEAR=1 OR WIFEJOBS.DEWTRCYEAR=1)

> | 1. WORKED JOB [PYEAR] – [CYEAR] | 5. ALL OTHERS | → GO TO DE47CKPT
> |---|---|
> ↓
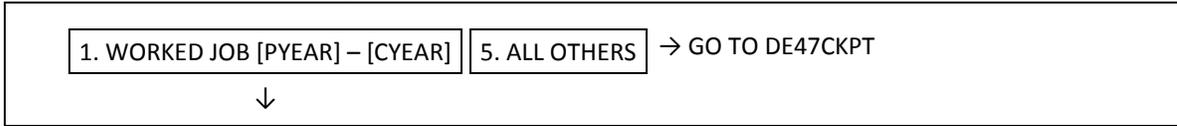
DE22. EMPLOYER: [DEEmpName] ([DEBegMo/DEBegYr] – [DEEndMo/DEEndYr])
[Are / Were / Is / Was] [you / WIFE/"WIFE"] self-employed, [are / were / is / was] [you / she] employed by someone else, or what?
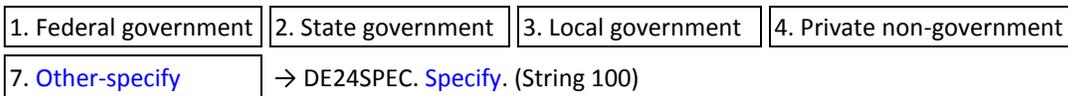
1. Someone else only	2. Both someone else and self	3. Self-employed only	DK/RF
GO TO DE24		↓	GO TO DE25CKPT
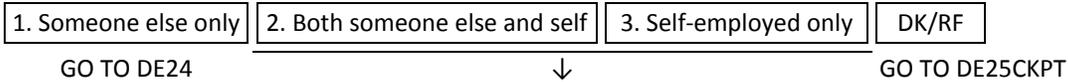
> DE23. EMPLOYER: [DEEmpName] ([DEBegMo/DEBegYr] – [DEEndMo/DEEndYr])
> [Is / Was] that an unincorporated business or a corporation?
>
> | 1. Unincorporated | 2. Corporation |
> |---|---|
> | GO TO DE25CKPT | |
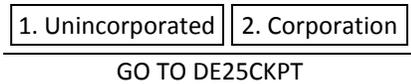
DE24. [EMPLOYER: [DEEmpName] ([DEBegMo/DEBegYr] – [DEEndMo/DEEndYr])
[Do / Does / Did] [you / WIFE/"WIFE"] work for the federal, state, or local government, a private company, or what?

1. Federal government	2. State government	3. Local government	4. Private non-government

7. Other-specify	→ DE24SPEC. Specify. (String 100)

DE25CKPT. CAI CHECKPOINT: WHETHER WIFE/"WIFE" WORKS FOR SOMEONE ELSE (DE22=1) OR SELF/BOTH/DK/RF (DE22=2, 3, DK/RF) ON CMJ (DE18.JOBTYPE=CMJ)

> | 1. CMJ, WORKS FOR SOMEONE ELSE | 2. CMJ, WORKS FOR SELF, BOTH, OR DK/RF | 5. ALL OTHERS | → GO TO DE42CKPT
> |---|---|---|
> | | ↓ | |
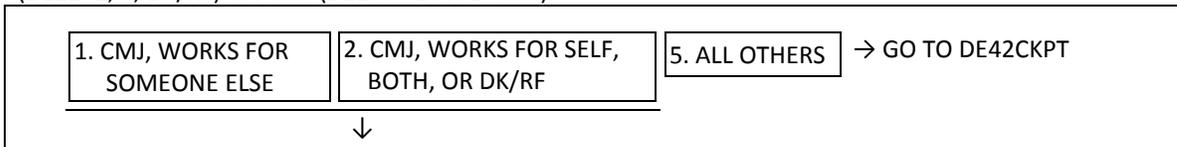
DE25A. EMPLOYER: [DEEmpName] ([DEBegMo/DEBegYr] – [DEEndMo/DEEndYr])
About how many people are employed by [you / DEEMPNAME] at the location where [you / WIFE/"WIFE"] work[s]?

1 – 999,999,997	→ GO TO DE26 RULE	DK/RF
		↓

> DE25B. Are there 200 or more?
>
> | 1. Yes | | 5. No | DK/RF | → GO TO DE26 RULE |
> |---|---|---|---|---|
> | ↓ | | ↓ | | |
> | DE25E. 500 or more? | | DE25C. 100 or more? | | |
>
> | 1. Yes | 5. No | DK/RF | 1. Yes | 5. No | DK/RF |
> |---|---|---|---|---|---|
> | ↓ | GO TO DE26 RULE | GO TO DE26 RULE | ↓ | GO TO DE26 RULE |
> | DE25F. 1000 or more? | | | DE25D. 50 or more? | | |
>
> | 1. Yes | 5. No | DK/RF | 1. Yes | 5. No | DK/RF |
> |---|---|---|---|---|---|
> | ↓ | | | ↓ | | |
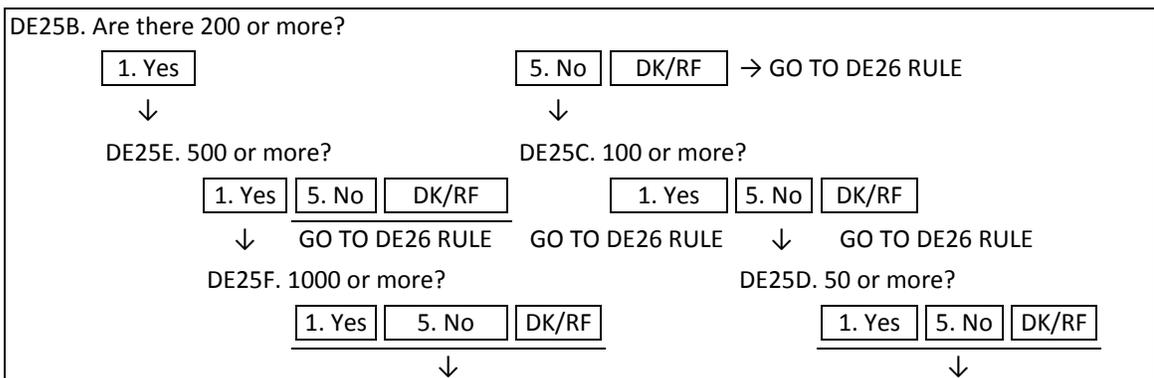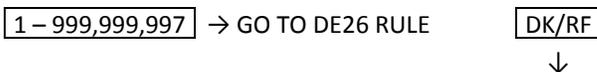
DE26 RULE. WHETHER WIFE/"WIFE" WORKS FOR SOMEONE ELSE (DE22=1) ON CMJ (DE18.JOBTYPE=CMJ)

CMJ, WORKS FOR SOMEONE ELSE	ALL OTHERS	→ GO TO DE28A
↓		

DE26. EMPLOYER: [BCEmpName] ([DEBegMo/DEBegYr] – [DEEndMo/DEEndYr])

Is [your / her] current job covered by a union contract?

1. Yes   5. No → GO TO DE28A

↓

DE27. [Do / Does] [you / WIFE/"WIFE"] belong to that labor union?

1. Yes   5. No

DE28A. EMPLOYER: [DEEmpName] ([DEBegMo/DEBegYr] – [DEEndMo/DEEndYr])

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

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

DE29. EMPLOYER: [DEEmpName] ([DEBegMo/DEBegYr] – [DEEndMo/DEEndYr])

(On [your / her] main job for [DEEMPNAME] ([DEBEGMO/DEBEGYR] – [DEENDMO/DEENDYR]),)

[are / is] [you / WIFE/"WIFE"] salaried, paid by the hour, or what?

1. Salaried   2. Salary + commission   3. Paid by hour   4. Hourly + tips   6. Hourly + commission

GO TO DE30   GO TO DE33

7. Other   DK/RF → GO TO DE40CKPT

↓

DE38. EMPLOYER: [DEEmpName] ([DEBegMo/DEBegYr] – [DEEndMo/DEEndYr])

How is that?

1. Piecework, hourly + piecework/ production	2. Commission
5. Self-employed, farmer, "profits"– draw on account	6. By the job/day/mile

7. Other-specify → DE38OS. Specify (String 500)

DE39. EMPLOYER: [DEEmpName] ([DEBegMo/DEBegYr] – [DEEndMo/DEEndYr])

If [you / she] worked an extra hour, how much would [you / she] earn for that hour?

- PER hour

$ 0.00 – 999,997.99

GO TO DE40CKPT

WIFE/"WIFE" IS SALARIED (DE29=1, 2)

DE30. EMPLOYER: [DEEmpName] ([DEBegMo/BCBegYr] – [DEEndMo/BCEndYr])

How much is [your / her] salary?

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

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

↓

DE30PER. EMPLOYER: [DEEmpName] ([DEBegMo/DEBegYr] – [DEEndMo/DEEndYr])
- The salary amount entered is: [DE30] per ＿＿＿
- SELECT the unit of time below

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

| 7. Other-specify | → DE30PERSPEC. Specify. (String 100)

DE31. EMPLOYER: [DEEmpName] ([DEBegMo/DEBegYr] – [DEEndMo/DEEndYr])
If [you / she] were to work more hours than usual during some week, would [you / she] get paid for those extra hours of work?

| 1. Yes | 5. No | → GO TO DE35CKPT

↓

DE32. EMPLOYER: [DEEmpName] ([DEBegMo/DEBegYr] – [DEEndMo/DEEndYr])
About how much would [you / she] make per hour for those extra hours?

| 1. Time and a half | 2. Double time | 3. Straight time | 4. Comp time | 5. Exact amount-specify |

GO TO DE35CKPT　　　　　　　　　　　　　　　　　　↓

DE32A. EMPLOYER: [DEEmpName] ([DEBegMo/DEBegYr] – [DEEndMo/DEEndYr])
- SPECIFY amount
- ENTER amount here, then ENTER unit of time on next screen (Hour, Day, Week, Two weeks, Month, Year)

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

↓

DE32APER. EMPLOYER: [DEEmpName] ([DEBegMo/DEBegYr] – [DEEndMo/DEEndYr])
- The amount entered is: [DE32A] per ＿＿＿
- SELECT the unit of time below

| 1. Hour | 2. Day | 3. Week | 4. Two Weeks | 5. Month | 6. Year |

| 7. Other-specify | → DE32APERSPEC. Specify. (String 100)

GO TO DE35CKPT

WIFE/"WIFE" PAID BY HOUR (DE29=3, 4, 6)
DE33. EMPLOYER: [DEEmpName] ([DEBegMo/DEBegYr] – [DEEndMo/DEEndYr])
What is [your / her] hourly wage rate for [your / her] regular work time?
- PER hour

| $ 1.00 – 997.99 |

DE34. EMPLOYER: [DEEmpName] ([DEBegMo/DEBegYr] – [DEEndMo/DEEndYr])
What is [your / her] hourly wage rate for overtime?
- ENTER all that apply

| 1. Time and a half | 2. Double time | 3. Straight time | 4. Comp time | 5. Exact amount-specify |

| 7. Other-specify | → DE34SPEC. Specify other overtime wage rate. (String 100)　　　↓

GO TO DE35CKPT

DE34A. EMPLOYER: [DEEmpName] ([DEBegMo/DEBegYr] – [DEEndMo/DEEndYr])
- SPECIFY overtime exact amount
- ENTER amount here, then ENTER unit of time on next screen (Hour, Day, Week, Two weeks, Month, Year)

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

↓

DE34APER. EMPLOYER: [DEEmpName] ([DEBegMo/DEBegYr] – [DEEndMo/DEEndYr])
- The amount entered is: [DE34A] per _____
- SELECT the unit of time below

| 1. Hour | 2. Day | 3. Week | 4. Two Weeks | 5. Month | 6. Year |

| 7. Other-specify | → DE34APERSPEC. Specify. (String 100)

DE35CKPT. CAI CHECKPOINT: WHETHER WIFE/"WIFE" GETS TIPS (DE29=4) OR COMMISSIONS (DE29=2, 6)

| 1. TIPS | | 2. COMMISSIONS | 5. ALL OTHERS | → GO TO DE40CKPT |
| ↓ | | ↓ | | |

DE36. EMPLOYER: [DEEmpName] ([DEBegMo/DEBegYr]–[DEEndMo/DEEndYr])
How much are [your / her] tips, on average?
- ENTER amount here, then ENTER unit of time on next screen (Hour, Day, Week, Two weeks, Month, Year)

| $ 1.00 – 99,997.99 | DK/RF | → GO TO DE40CKPT
↓

DE36PER. EMPLOYER: [DEEmpName] ([DEBegMo/DEBegYr]–[DEEndMo/DEEndYr])
- The amount entered is: [DE36] per _____
- SELECT the unit of time below

| 1. Hour | 2. Day | 3. Week |
| 4. Two Weeks | 5. Month | 6. Year |
| 7. Other-specify | → DE36PERSPEC. Specify. (String 100)

DE37. EMPLOYER: [DEEmpName] ([DEBegMo/DEBegYr]– [DEEndMo/DEEndYr])
How much is [your / her] commission on average?
- ENTER amount here, then ENTER unit of time on next screen (Week, Two weeks, Month, Year)

| $ 1.00 – 99,997.99 | DK/RF | → GO TO DE40CKPT
↓

DE37PER. EMPLOYER: [DEEmpName] ([DEBegMo/DEBegYr]–[DEEndMo/DEEndYr])
- The amount entered is: [DE37] per _____
- SELECT the unit of time below

| 3. Week | 4. Two Weeks |
| 5. Monty | 6. Year |
| 7. Other-specify | → DE37ERSPEC. Specify. (String 100)

DE40CKPT. CAI CHECKPOINT: WHETHER WIFE/"WIFE" WORKS FOR SOMEONE ELSE ONLY (DE22=1)

| 1. WORKS FOR SOMEONE ELSE | 5.ALL OTHERS | → GO TO DE42CKPT |
| ↓ | | |

DE41. EMPLOYER: [DEEmpName] ([DEBegMo/DEBegYr] – [DEEndMo/DEEndYr])
How many years' experience [do / does] [you / WIFE/"WIFE"] have altogether with [your / her] present employer?
- USE Years for amounts given in whole years
- USE Months and Weeks for amounts less than one year
- USE 1 week for amounts of one week or less

YEARS	1 – 50
MONTHS	1 – 12
WEEKS	1 – 52

DE42CKPT. CAI CHECKPOINT: WHETHER WIFE/"WIFE" WORKED THIS JOB PYEAR (WIFEJOBS.DEWTRP1YEAR=1);
WHETHER PYEAR WEEKS WORKED (EMPLOYEHC2.ROUNDED) CAN BE COMPUTED
(EMPLOYEHC2.BCDEDKJOBSP1YR) OR HOURS PER WEEK CAN BE COMPUTED
(EMPLOYEHC2.BCDEDKHOURSP1YR)

WORKED JOB DURING [PYEAR]			5. ALL OTHERS
MORE THAN ONE JOB (EMPLOYEHC2.BCDEWTRPYCOUNT)		4. ONE JOB	GO TO BC47CKPT
1. CAN'T COMPUTE WEEKS WORKED	2. CAN'T COMPUTE HRS/WK WORKED	3. WKS & HRS/WK COMPUTED	GO TO DE46
↓	GO TO DE43	GO TO DE44 RULE	

DE42A. EMPLOYER: [DEEmpName] ([DEBegMo/DEBegYr] – [DEEndMo/DEEndYr])
How many weeks out of the year did [you / WIFE/"WIFE"] actually work on this job in [PYEAR], not including
any time off that you told me about earlier?
- IF R says "Every week except what (I / she) took off", ENTER [97]

1.0 – 52.0   97.0

*DE42A data used to calculate 'total weeks worked' and not included in public use data

DE43 RULE. WHETHER PYEAR HOURS PER WEEK CAN BE COMPUTED (EMPLOYEHC2.BCDEDKHOURSP1YR)

CAN'T COMPUTE HRS PER WK	ALL OTHERS	→ GO TO DE44 RULE
↓		

DE43. EMPLOYER: [DEEmpName] ([DEBegMo/DEBegYr] – [DEEndMo/DEEndYr])
((And) the job with [EMPLOYER] ([START MO YR] to [END MO YR]),…)
On average, how many hours a week did [you / she] work on this job in [PYEAR]?

1 – 112

DE44 RULE. WHETHER PYEAR OVERTIME CAN BE COMPUTED (EMPLOYEHC2.BCDEDKOTP1YR)

CAN'T COMPUTE OVERTIME	ALL OTHERS	→ GO TO DE46
↓		

DE44. EMPLOYER: [DEEmpName] ([DEBegMo/DEBegYr] – [DEEndMo/DEEndYr])
((And) the job with [EMPLOYER] ([START MO YR] to [END MO YR]),…)
Did [you / she] work any overtime [*HRS/WK COMPUTED BUT OT NOT COMPUTED*: (on this job in [PYEAR]) /
HRS/WK & OT NOT COMPUTED: **which isn't included in that**]?

1. Yes   5. No   → GO TO DE46
↓

DE45. EMPLOYER: [DEEmpName] ([DEBegMo/DEBegYr] – [DEEndMo/DEEndYr])
How many hours did that overtime amount to in (that period during) [PYEAR]?
- ENTER amount here, then ENTER unit of time on next screen (Week, Two weeks, Month, Year)

1 – 3760   DK/RF   → GO TO DE46
↓

DE45PER. EMPLOYER: [DEEmpName] ([DEBegMo/DEBegYr] – [DEEndMo/DEEndYr])
- The amount entered is: [DE45] per ____
- SELECT the unit of time below

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

7. Other-specify → DE45PERSPEC. Specify. (String 100)

DE46. EMPLOYER: [DEEmpName] ([DEBegMo/DEBegYr] – [DEEndMo/DEEndYr])
About how much did [you / she] make at this job in [PYEAR]?
- ENTER amount here, then ENTER unit of time on next screen (Hour, Day, Week, Two weeks, Month, Year)

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

↓

DE46PER. EMPLOYER: [DEEmpName] ([DEBegMo/DEBegYr] – [DEEndMo/DEEndYr])
- The amount entered is: [DE46] per ____
- SELECT the unit of time below

| 1. Hour | 2. Day | 3. Week | 4. Two Weeks | 5. Month | 6. Year |

7. Other-specify → DE46PERSPEC. Specify. (String 100)

DE47CKPT. CAI CHECKPOINT: WHETHER WIFE/"WIFE" WORKED THIS JOB P2YEAR (WIFEJOBS.DEWTRP2YEAR=1); WHETHER P2YEAR WEEKS WORKED (EMPLOYEHC2.ROUNDED2) CAN BE COMPUTED (EMPLOYEHC2.BCDEDKJOBSP2YR) OR HOURS PER WEEK CAN BE COMPUTED (EMPLOYEHC2.BCDEDKHOURSP2YR)

WORKED JOB DURING [P2YEAR]			5. ALL OTHERS
MORE THAN ONE JOB (EMPLOYEHC2.BCDEWTRPPYCOUNT)		4. ONE JOB	GO TO DE50CKPT
1. CAN'T COMPUTE WEEKS WORKED	2. CAN'T COMPUTE HRS/WK WORKED	3. WKS & HRS/WK COMPUTED	GO TO DE50CKPT
↓	GO TO DE48	GO TO DE50CKPT	

DE47A. EMPLOYER: [DEEmpName] ([DEBegMo/DEBegYr] – [DEEndMo/DEEndYr])
((And) the job with [DEEMPNAME] ([DEBEGMO/DEBEGYR] – [DEENDMO/DEENDYR]),...)
How many weeks out of the year did [you / WIFE/"WIFE"] actually work on this job in [P2YEAR] ?
- IF R says "Every week except what (I / she) took off", ENTER [97]

1.0 – 52.0 | 97.0

DE48 RULE. WHETHER P2YEAR HOURS PER WEEK CAN BE COMPUTED (EmployEHC2.BCDEDKJOBSP2Yr)

CAN'T COMPUTE HRS PER WK	ALL OTHERS → GO TO DE50CKPT
↓	

DE48. EMPLOYER: [DEEmpName] ([DEBegMo/DEBegYr] – [DEEndMo/DEEndYr])
((And) the job with [DEEMPNAME] ([DEBEGMO/DEBEGYR] – [DEENDMO/DEENDYR]),...)
On average, how many hours a week did [you / she] work on this job in [P2YEAR] ?

1 – 112

DE50CKPT. CAI CHECKPOINT: WHETHER WIFE/"WIFE" STOPPED THIS JOB P2YEAR-CYEAR ((WIFEJOBS.DECUR=0) OR (DE18.JOBTYPE=MRMJ) OR (DE18.JOBTYPE=OTHERJOB AND WIFEJOBS.DECUR=0))

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

DE51. EMPLOYER: [DEEmpName] ([DEBegMo/DEBegYr] – [DEEndMo/DEEndYr])
((And) the job with [DEEMPNAME] ([DEBEGMO/DEBEGYR] – [DEENDMO/DEENDYR]),…)
Why did [you / she] stop working for [DEEMPNAME] ([DEBEGMO/DEBEGYR] – [DEENDMO/DEENDYR])? Did the company go out of business, [were / was] [you / she] laid off, did [you / she] quit, or what?

String 500

DE52CKPT. CAI CHECKPOINT: WHETHER WIFE/"WIFE" HAS MORE JOBS

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

End DEJobs Block

DE61CKPT. CAI CHECKPOINT: WHETHER WIFE/"WIFE" DID NOT WORK AT ALL SINCE 1/1/P2YEAR (DEWTRWRK=0)

1. NO WORK SINCE 1/1/[P2YEAR]	5. ALL OTHERS	→ GO TO DE64
↓		

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

1. Yes   5. No   → GO TO DE64
↓

DE63.MONTH. In what month and year did [you / she] last work?
- IF NECESSARY: What would be your best estimate?
- SELECT Month and [Enter] to go to next screen for year

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December
21. Winter	22. Spring	23. Summer	24. Fall		

DE63.YEAR. (In what month and year did [you / she] last work?)
[DE63.MONTH], _____
- ENTER [9997] if before [P2YEAR] and DK exact year

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

DE64. [Have / Has] [you / WIFE/"WIFE"] been looking for [*WORKING NOW*: another job / *ALL OTHERS*: work] during the past four weeks?

1. Yes   5. No   → GO TO SECTION F
↓

DE65. What [have / has] [you / she] been doing the last four weeks to find [*WORKING NOW*: another job / *ALL OTHERS*: work]?
- ENTER all that apply
- PROBE: Any others?
- IF R SAYS "Internet, website, on-line, on the computer" etc., PROBE: What did [you / WIFE/"WIFE"] do – did [you / WIFE/"WIFE"] contact employers or agencies, check out companies anonymously, answer or place ads, or what?

1. Checked with public employment agency	2. Checked with private employment agency
3. Checked with current employer directly	4. Checked with other employer directly
5. Checked with friends or relative	6. Placed or answered ads
7. Other-specify → DE65SPEC. Specify. (String 100)	8. Nothing

DE66CKPT. CAI CHECKPOINT: WHETHER WIFE/"WIFE" DOES NOT HAVE CMJ (DE15CKPT=3, 4, 5)

1. NO CMJ	5. ALL OTHERS	→ GO TO SECTION F
↓		

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

YEARS	1 – 50
MONTHS	1 – 12
WEEKS	1 – 52

Section F: Housework, Child Care, Food, Vehicles and Expenses
Return to TOC

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

| 1. Continue |

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

HEAD IS MALE		3. HEAD IS FEMALE
1. WIFE/"WIFE" IN FU	2. NO WIFE/"WIFE" IN FU	GO TO F3
↓	GO TO F3	

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

Housework hours per week:
- 0   None
- 1–111   Actual hours
- 112   112 Hours or more

| 0 – 112 |

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

Housework hours per week:
- 0   None
- 1–111   Actual hours
- 112   112 Hours or more

| 0 – 112 |

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

1. 2+ FU MEMBERS	5. ONLY 1 FU MEMBER	→ GO TO F6CKPT
↓		

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

| 0 – 7 |

F6CKPT. CAI CHECKPOINT: WHETHER ANY PYEAR FU MEMBER IS NOW 5-18YEARS OLD (FUP1YEAR.AGEIWDATE=5-18)

1. FU MEMBER IS 5-18 YEARS OLD	5. ALL OTHERS	→ GO TO F6CCKPT
↓		

F6A. **And during [PYEAR]**, did [*ONE CHILD IN FU PYEAR*: [CYNAMF CYNAML] / *ALL OTHERS*: any child in [*R=FU MEMBER*: your / *R=PROXY*: the] family between 5 and 18 years old] receive free or reduced-cost lunches at school?

[1. Yes] [5. No]

F6B. (During [PYEAR],) did [*ONE CHILD IN FU PYEAR*: [CYNAMF CYNAML] / *ALL OTHERS*: any child in [*R=FU MEMBER*: your / *R=PROXY*: the] family between 5 and 18 years old] receive free or reduced-cost breakfasts at school?

[1. Yes] [5. No]

F6CCKPT. CAI CHECKPOINT: WHETHER ANY CURRENT FU MEMBER IS NOW 15 OR YOUNGER (FUP1YEAR.AGEIWDATE <16)

[1. FU MEMBER IS <16 YEARS OLD] [5. ALL OTHERS] → GO TO F6HCKPT
↓

F6D. How much did [*R=FU MEMBER*: you [*PYEAR FU COUNT>1*: and your family living there] / *R=PROXY & CYEAR FU COUNT=1*: they / *R=PROXY & PYEAR FU COUNT>1*: the family living there] pay for child care in [PYEAR]?
- ENTER amount here, then ENTER unit of time on next screen (Week, Two weeks, Month, Year)

[$ 0] → GO TO F6E   [$ 1 – 999,997] [DK/RF] → GO TO F6D2

↓

F6DPER. The amount entered is: [F6D] per ____
- SELECT the unit of time below

[3. Week] [4. Two weeks] [5. Month] [6. Year]
[7. Other-specify] → F6DPERSPEC. Specify. (String 100)

F6D2. For which months in [PYEAR] was that?

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

F6E. Was any child enrolled in a day care center or family day care home in [PYEAR]?

[1. Yes] [5. No] → GO TO F6HCKPT

↓

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

[1. Yes] [5. No] → GO TO F6HCKPT

↓

F6G. Did that day care center or family day care home participate in any government-sponsored food program, such as the Child and Adult Care Food Program?

[1. Yes] [5. No]

F6HCKPT. CAI CHECKPOINT: WHETHER ANY PYEAR FEMALE FU MEMBER IS NOW 16-46 YEARS OLD (FUP1YEAR.GENDER=2 AND FUP1YEAR.AGEIWDATE=16-46) OR ANY PYEAR FU MEMBER IS NOW 5 OR YOUNGER (FUP1YEAR.AGEIWDATE<6)

[1. PYEAR FEMALE FU MEMBER IS 16-46 YEARS OLD OR PYEAR FU MEMBER IS <6 YEARS OLD] [5. ALL OTHERS] → GO TO F7BCKPT
↓

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

| 1. Yes | 5. No |

F7BCKPT. CAI CHECKPOINT: WHETHER ANY PYEAR FU MEMBER IS NOW 61 OR OLDER (FUP1YEAR.AGEIWDATE>60)

| 1. FU MEMBER IS >60 YEARS OLD | 5. ALL OTHERS | → GO TO F8
↓

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

| 1. Yes | 5. No |

F8. Did [*R=FU MEMBER*: you [*P2YEAR FU COUNT>1*: or anyone else in your family] / *R=PROXY & CYEAR FU COUNT=1*: they / *R=PROXY & P2YEAR FU COUNT>1*: anyone in the family] receive food stamp benefits, that is, either food stamps or a food stamp benefit card, at any time in [P2YEAR], two years ago?
- If needed: Food stamp benefits are issued by SNAP, the federal Supplemental Nutrition Assistance Program, also called Food Stamp Program.

| 1. Yes | 5. No | → GO TO F11
↓

    F9. How much did [*R=FU MEMBER*: you / *R=PROXY*: they] receive (in food stamp benefits) in [P2YEAR]?
- If needed: Food stamp benefits are issued by SNAP, the federal Supplemental Nutrition Assistance Program, also called Food Stamp Program.
- ENTER amount here, then ENTER unit of time on next screen (Week, Two weeks, Month, Year)

    | \$ 1 – 999,997 | DK/RF | → GO TO F10
    ↓

    F9PER. The amount entered is: [F9] per ____
- SELECT the unit of time below

    | 3. Week | 4. Two weeks | 5. Month | 6. Year |
    | 7. Other-specify | → F9PERSPEC. Specify. (String 100)

    F10. During which months was that?
- ENTER al that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

F11. Did [*R=FU MEMBER*: you [*PYEAR FU COUNT>1*: or anyone else in your family] / *R=PROXY & CYEAR FU COUNT=1*: they / *R=PROXY & PYEAR FU COUNT>1*: anyone in the family] receive food stamp benefits, (that is, either food stamps or a food stamp benefit card,) at any time last year, in [PYEAR]?
- If needed: Food stamp benefits are issued by SNAP, the federal Supplemental Nutrition Assistance Program, also called Food Stamp Program.

| 1. Yes | 5. No | → GO TO F14
↓

F12. How much did [*R=FU MEMBER*: you / *R=PROXY*: they] receive (in food stamp benefits) in [PYEAR]?
- If needed: Food stamp benefits are issued by SNAP, the federal Supplemental Nutrition Assistance Program, also called Food Stamp Program.
- ENTER amount here, then ENTER unit of time on next screen (Week, Two weeks, Month, Year)

| $ 1 – 999,997 | DK/RF | → GO TO F13

    ↓

F12PER. The amount entered is: [F12] per _____
- SELECT the unit of time below

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

| 7. Other-specify | → F12PERSPEC. Specify. (String 100)

F13. During which months was that?
- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

F14. Did [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or anyone else now living in your family] / *R=PROXY & CYEAR FU COUNT=1*: they / *R=PROXY & CYEAR FU COUNT>1*: anyone in the family] use food stamp benefits last month?
- If needed: Food stamp benefits are issued by SNAP, the federal Supplemental Nutrition Assistance Program, also called Food Stamp Program.

| 1. Yes | 5. No | → GO TO F18F22

    ↓

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

| 1 – 7 |

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

| $ 1 – 999,997 |

F17. In addition to what [*R=FU MEMBER*: you / *R=PROXY*: they] buy with food stamp benefits, [do / does] [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or anyone else in your family] / *R=PROXY & CYEAR FU COUNT=1*: they / [*R=PROXY & CYEAR FU COUNT>1*: anyone else in the family] spend any money on food that [*R=FU MEMBER*: you / *R=PROXY*: they] use at home?
- If needed: Food stamp benefits are issued by SNAP, the federal Supplemental Nutrition Assistance Program, also called Food Stamp Program.

| 1. Yes | 5. No | → GO TO F19F23

    ↓

F18F22. [*F14=YES*: How much [do / does] [*R=FU MEMBER*: you / *R=PROXY*: they] spend on that food in an average week? /
F14≠YES: How much [*R=FU MEMBER*: do you [*CYEAR FU COUNT>1*: and everyone else in your family] / *R=PROXY & CYEAR FU COUNT=1*: does [HEAD] / *R=PROXY & CYEAR FU COUNT>1*: the family] spend on food that [*R=FU MEMBER*: you / *R=PROXY*: [he / she] / *R=PROXY & CYEAR FU COUNT>1*: they] [use / uses] at home in an average week?]

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

[*F17 NOT ASKED*: $ 0.00] → GO TO F19F23 $ 1.00 – 99,997.99   DK/RF   → GO TO F19F23

↓

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

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

7. Other-specify   → F18F22PERSPEC. Specify. (String 100)

F19F23. Do [*R=FU MEMBER*: you / *R=PROXY*: they] have any food delivered to the door which isn't included in that?

1. Yes   5. No   → GO TO F21F25

↓

F20F24. How much do [*R=FU MEMBER*: you / *R=PROXY*: they] spend on that food?
- [*HU/CS IN FU*: IF R lives with non-FU members, PROBE: Is that only [*R=FU MEMBER*: your / *R=PROXY*: their] (FU's) share of the food?]
- ENTER amount here, then ENTER unit of time on next screen (Week, Two weeks, Month, Year)

$ 1.00 – 99,997.99   DK/RF   → GO TO F21F25

↓

F20F24PER. The amount entered is: [F20F24] per _____
- SELECT the unit of time below

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

7. Other-specify   → F20F24PERSPEC. Specify. (String 100)

F21F25. About how much [do / does] [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: and everyone else in your family] / *R=PROXY & CYEAR FU COUNT=1*: they [*CYEAR FU COUNT>1*: the family] spend eating out?
- [*HU/CS IN FU*: IF R lives with non-FU members, PROBE: Is that only [*R=FU MEMBER*: your / *R=PROXY*: their] (FU's) share of the food?]
- ENTER amount here, then ENTER unit of time on next screen (Week, Two weeks, Month, Year)

$ 0.00 → GO TO F47 $ 1.00 – 99,997.99   DK/RF → GO TO F47

↓

F21F25PER. The amount entered is: [F21F25] per _____
- SELECT the unit of time below

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

7. Other-specify   → F21F25PERSPEC. Specify. (String 100)

Vehicles

F47. These next questions are about personal vehicles and transportation. [Do / Does] [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or anyone else in your family living there] / *R=PROXY* & *CYEAR FU COUNT=1*: they / *R=PROXY* & *CYEAR FU COUNT>1*: the family] own or lease a car or other vehicle for personal use?
- DO NOT include motorcycles or vehicles used exclusively by institutionals, HU or HUCS people

   | 1. Yes || 5. No | → GO TO F81A

    ↓

F48. Altogether, how many vehicles [do / does] [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: and your family living there] / *R=PROXY* & *CYEAR FU COUNT=1*: they / *R=PROXY* & *CYEAR FU COUNT>1*: the family] own or lease (for [*R=FU MEMBER*: your / *R=PROXY*: their] personal use)?
- DO NOT include motorcycles or vehicles used exclusively by institutionals, HU or HUCS people

   | 1 – 10 || DK || RF | → GO TO F81A

    ↓

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

   | 1901 – [C2YEAR] |

F49B. What is the make and model of the vehicle?
- PROBE if multiple models are listed with the same name

   | MAKE & MODEL || DK/RF | → GO TO F49BCKPT

    ↓

F49B1. Hybrid Indicator from Car Database Lookup (CODES=0, 1)

F49C. 8-Digit Vehicle Model ID from Car Database Lookup

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

1. VEHICLE IS HYBRID || 2. YEAR IS 1998 OR EARLIER		5. ALL OTHERS
GO TO F53 RULE	↓

F49B2. [F49A F49B]
Is this vehicle a hybrid?

   | 1. Yes || 5. No |

F53 RULE. NUMBER OF VEHICLES AT F48

ONE VEHICLE OR F48=DK || 2 OR MORE VEHICLES	→ REPEAT F49A–F49B2;
↓	MAX=3; THEN GO TO F53

F53. [F49A F49B]
(And) for [*R=FU MEMBER*: your / *R=PROXY*: their] [*F49B=DK/RF*: [first / second / third] vehicle / *ALL OTHERS*: [F49B]], did [*R=FU MEMBER*: you / *R=PROXY*: they] buy it, lease it, receive it as a gift, or what?

| 1. Bought | | 2. Leased || 3. Received as a gift |

7. Other-specify	→ F53SPEC. Specify. (String 100)	DK/RF
↓	GO TO F75 RULE

F54. [F49A F49B]

Did [*R=FU MEMBER*: you / *R=PROXY*: they] [*F53=BOUGHT*: buy / *F53=LEASED*: lease / *F53=GIFT*: receive / *F53=OTHER*: acquire] this vehicle new or used?

| 1. New | 2. Used |

F55. [F49A F49B]

In what year did [*R=FU MEMBER*: you / *R=PROXY*: they] [*F53= BOUGHT*: buy / *F53= LEASED*: lease / *F53=GIFT*: receive / *F53=OTHER*: acquire] it?

| 1901 – [CYEAR] |

F57. [F49A F49B]

Not counting routine use to get to and from work, is this vehicle also used for business purposes?

| 1. Yes | 5. No | → GO TO F60 RULE

↓

F58. [F49A F49B]

Is it used primarily for business purposes?
- DEFINITION: more than half of the miles driven per year are for business

| 1. Yes | 5. No |

F60 RULE. WHETHER THIS VEHICLE BOUGHT (F53=1) OR LEASED (F53=2) DURING P2YEAR – CYEAR (F55)

| BOUGHT [P2YEAR] OR LATER | LEASED [P2YEAR] OR LATER | ALL OTHERS | → GO TO F75 RULE |
| ↓ | GO TO F71 RULE | | |

F61. [F49A F49B]

What was the total price of the [*F49B=DK/RF*: [first / second / third] vehicle / *ALL OTHERS*: [F49B]]?

| $ 1 – 999,997 |

F64. [F49A F49B]

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

| $ 0 – 999,997 |

F65. [F49A F49B]

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

| 1. Yes | 5. No | → GO TO F75 RULE

↓

F66. [F49A F49B]

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

| $ 1 – 999,997 |

F67. [F49A F49B]

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

| $ 0 | → GO TO F75 RULE | $ 1 – 999,997 | DK/RF | → GO TO F75 RULE

↓

F67PER. The amount entered is: [F67] per ____
- SELECT the unit of time below

| 5. Month | 6. Year | 7. Other-specify | → F67PERSPEC. Specify. (String 100)

F69. [F49A F49B]

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

| 1 – 100 |

F70. [F49A F49B]

How many payments have [*R=FU MEMBER*: you / *R=PROXY*: they] made?

| 0 – 100 |

F71 RULE. WHETHER THIS VEHICLE LEASED (F53=2) DURING P2YEAR – CYEAR (F55)

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

F71. [F49A F49B]

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

| $ 1 – 999,997 |

F72. [F49A F49B]

How much are [*R=FU MEMBER*: your / *R=PROXY*: their] payments and how often are they made?
- ENTER amount here, then ENTER unit of time on next screen (Month, Year)

| $ 1 – 999,997 | DK/RF | → GO TO F75 RULE
    ↓

F72PER. The amount entered is: [F72] per ____
- SELECT the unit of time below

| 5. Month | 6. Year | 7. Other-specify | → F72PERSPEC. Specify. (String 100)

F73. [F49A F49B]

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

| 1 – 100 |

F74. [F49A F49B]

How many payments have [*R=FU MEMBER*: you / *R=PROXY*: they] made?

| 0 – 100 |

F75 RULE. NUMBER OF VEHICLES AT F48

| ONE VEHICLE OR F48=DK | 2 OR MORE VEHICLES | → REPEAT F53–F74; MAX=3;
    ↓   THEN GO TO F76 RULE

F76 RULE. WHETHER OWNS OR LEASES ANY VEHICLES (F47=YES)

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┌──────────────────────────────────────────────────────────┐
│  OWNS OR LEASES A VEHICLE │ ALL OTHERS │ → GO TO F81A    │
│                ↓                                          │
└──────────────────────────────────────────────────────────┘
```

F77. How much [do / does] [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: and your family living there] / *R=PROXY & CYEAR FU COUNT=1*: they / *R=PROXY & CYEAR FU COUNT>1*: the family] pay for car insurance [*F48=2+, DK*: for all of [*R=FU MEMBER*: your / *R=PROXY*: their] vehicles]?
- IF necessary: Please give me your best estimate.
- ENTER amount here, then ENTER unit of time on next screen (Month, Year)

$ 0 │ → GO TO F80A $ 1 – 999,997 │ DK/RF │ → GO TO F80A
                                ↓

F77PER. The amount entered is: [F77] per _____
- SELECT the unit of time below

5. Month │ 6. Year │ 7. Other-specify │ → F77PERSPEC. Specify. (String 100)

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

```
┌──────────────────────────────────────────────────────────────────────┐
│  VEHICLE BOUGHT/LEASED BEFORE [P2YEAR] │ ALL OTHERS & F55=DK/RF │ → GO TO F80A │
│                ↓                                                       │
└──────────────────────────────────────────────────────────────────────┘
```

F79. (Other than the car payments you already told me about,) how much did [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: and your family living there] / *R=PROXY & CYEAR FU COUNT=1*: they / *R=PROXY & CYEAR FU COUNT>1*: the family] pay in car payments in [LAST MONTH]?
- INCLUDE vehicle purchase and lease payments not already covered

$ 0 – 999,997

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

$ 0 – 99,997

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

$ 0 – 99,997

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

$0 – 99,997

End Vehicles

F81A. [*F47=YES*: (Altogether for the month of [LAST MONTH], how much did [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: and your family living there] / *R=PROXY & CYEAR FU COUNT=1*: they / *R=PROXY* & *CYEAR FU COUNT>1*: the family] pay for each of these transportation related expenses. Do not include costs associated with trips and vacations, which we will ask about later.) / *ALL OTHERS*: Altogether for the month of [LAST MONTH], how much did [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: and your family living there] / *R=PROXY & CYEAR FU COUNT=1*: they / *R=PROXY* & *CYEAR FU COUNT>1*: the family] pay for each of these transportation related expenses. Do not include costs associated with trips and vacations, which we will ask about later.]
Bus fares and train fares?
- ENTER to the nearest dollar. IF none, ENTER [0]

$0 – 99,997

F81B. (Altogether for the month of [LAST MONTH], how much did [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: and your family living there] / *R=PROXY & CYEAR FU COUNT=1*: they / *R=PROXY* & *CYEAR FU COUNT>1*: the family] pay for each of these transportation related expenses . Do not include costs associated with trips and vacations, which we will ask about later.)
Taxicabs?
- ENTER to the nearest dollar. IF none, ENTER [0]

$0 – 99,997

F81C. (Altogether for the month of [LAST MONTH], how much did [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: and your family living there] / *R=PROXY & CYEAR FU COUNT=1*: they / *R=PROXY* & *CYEAR FU COUNT>1*: the family] pay for each of these transportation related expenses. Do not include costs associated with trips and vacations, which we will ask about later.)
Other transportation costs?
- ENTER to the nearest dollar. IF none, ENTER [0]

$0 → GO TO F82 $1 – 99,997
↓
F81CSPEC. What were those other costs?
String 100

F82. In [PYEAR], did [*R=FU MEMBER*: you [*PYEAR FU COUNT>1*: and your family living there] / *R=PROXY & CYEAR FU COUNT=1*: they / *R=PROXY* & *PYEAR FU COUNT>1*: the family] have any school-related expenses such as:
Purchase or rental of books, supplies, uniforms, or equipment including computers and software;
Tuition or tutoring (not including any amounts already mentioned for day care or nursery school);
Room and board for a family member who is away at school?

1. Yes to any expense item   5. No   → GO TO F87
↓
F83. How much in total were these expenses?
$1 – 999,997

F84. In [PYEAR], were there any other school-related expenses not already covered in the previous question?

> 1. Yes | 5. No → GO TO F87
>
> ↓
>
> F85. What other types of school-related expenses did [*R=FU MEMBER*: you / *R=PROXY*: they] have?
>
> String 400
>
> F86. Altogether, how much were these other expenses?
>
> $ 1 – 999,997

F87. Next, let me ask you about some other household expenses. Please indicate to the best of your ability, the amount spent on each of these items altogether during [PYEAR]. Or, if you prefer, the amount [*R=FU MEMBER*: you / *R=PROXY*: they] spent in an average week or month in [PYEAR].
How much did [*R=FU MEMBER*: you [*PYEAR FU COUNT>1*: and your family living there] / *R=PROXY & CYEAR FU COUNT=1*: they / *R=PROXY* & *PYEAR FU COUNT>1*: the family] spend altogether in [PYEAR] on home repairs and maintenance, including materials plus any costs for hiring a professional?

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

$ 0 → GO TO F88 $ 1 – 999,997   DK/RF

↓   ↓

F87PER. The amount entered is: [F87] per __	F87A. Would it amount to $400 or more?
• SELECT the unit of time below	1. Yes 5. No | DK/RF → GO TO F88
5. Month 6. Year	↓ ↓
7. Other-specify → F87PERSPEC. Specify. (String 100)	F87B. $1000 or more? F87C. $100 or more?
↓	1. Yes | 5. No 1. Yes | 5. No
	↓ ↓

F88. (How much did [*R=FU MEMBER*: you [*PYEAR FU COUNT>1*: and your family living there] / *R=PROXY & CYEAR FU COUNT=1*: they / *R=PROXY* & *PYEAR FU COUNT>1*: the family] spend altogether in [PYEAR]…)
On household furnishings and equipment, including household textiles, furniture, floor coverings, major appliances, small appliances and miscellaneous housewares?

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

$ 0 → GO TO F89 $ 1 – 999,997   DK/RF

↓   ↓

F88PER. The amount entered is: [F88] per __	F88A. Would it amount to $500 or more?
• SELECT the unit of time below	1. Yes 5. No | DK/RF → GO TO F89
5. Month 6. Year	↓ ↓
7. Other-specify → F88PERSPEC. Specify. (String 100)	F88B. $1500 or more? F88C. $100 or more?
↓	1. Yes | 5. No 1. Yes | 5. No
	↓ ↓

F89. (How much did [*R=FU MEMBER*: you [*PYEAR FU COUNT>1*: and your family living there] / *R=PROXY & CYEAR FU COUNT=1*: they / *R=PROXY* & *PYEAR FU COUNT>1*: the family] spend altogether in [PYEAR]…)
On clothing and apparel, including footwear, outerwear, and products such as watches or jewelry?
- ENTER amount here, then ENTER unit of time on next screen (Month, Year)

| $ 0 | → GO TO F90 | $ 1 – 999,997 | DK/RF |

↓ ↓

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

| 5. Month | 6. Year |

| 7. Other-specify | → F89PERSPEC.
Specify. (String 100)

↓

F89A. Would it amount to $700 or more?

| 1. Yes | | 5. No | DK/RF | → GO TO F90 |

↓ ↓

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

| 1. Yes | 5. No | | 1. Yes | 5. No |

↓ ↓

F90. (How much did [*R=FU MEMBER*: you [*PYEAR FU COUNT>1*: and your family living there] / *R=PROXY & CYEAR FU COUNT=1*: they / *R=PROXY* & *PYEAR FU COUNT>1*: the family] spend altogether in [PYEAR]…)
On trips and vacations, including transportation, accommodations, and recreational expenses on trips?
- ENTER amount here, then ENTER unit of time on next screen (Month, Year)

| $ 0 | → GO TO F91 | $ 1 – 999,997 | DK/RF |

↓ ↓

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

| 5. Month | 6. Year |

| 7. Other-specify | → F90PERSPEC.
Specify. (String 100)

↓

F90A. Would it amount to $500 or more?

| 1. Yes | | 5. No | DK/RF | → GO TO F91 |

↓ ↓

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

| 1. Yes | 5. No | | 1. Yes | 5. No |

↓ ↓

F91. (How much did [*R=FU MEMBER*: you [*PYEAR FU COUNT>1*: and your family living there] / *R=PROXY & CYEAR FU COUNT=1*: they / *R=PROXY* & *PYEAR FU COUNT>1*: the family] spend altogether in [PYEAR]…)
On recreation and entertainment, including tickets to movies, sporting events, and performing arts and hobbies including exercise, bicycles, trailers, camping, photography, and reading materials? Do not include costs associated with the trips and vacations you mentioned previously.
- ENTER amount here, then ENTER unit of time on next screen (Month, Year)

| $ 0 | → GO TO
SECTION G | $ 1 – 999,997 | DK/RF |

↓ ↓

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

| 5. Month | 6. Year |

| 7. Other-specify | → F91PERSPEC.
Specify. (String 100)

↓

F91A. Would it amount to $500 or more?

| 1. Yes | | 5. No | DK/RF | → GO TO SECT G |

↓ ↓

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

| 1. Yes | 5. No | | 1. Yes | 5. No |

↓ ↓

Section G: Last Year Income

G1. We try to understand how people all over the country are getting along financially, so now I have some questions about earnings and income.
- ENTER [1] to continue

| 1. Continue |

Farm Income

G1A. CAI CHECKPOINT: WHETHER HEAD IS FARMER OR RANCHER ON CURRENT MAIN JOB (BC18.JOBTYPE =CMJ & BC28=YES)

| 1. HEAD IS FARMER/RANCHER ON CMJ | ALL OTHERS | → GO TO G5 |
↓

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

| $ 0 – 9,999,997 |

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

| $ 0 – 9,999,997 |

G4. That left [you / him / her] a net income from farming of?
- If needed: Total Receipts - Total Expenses = $[G2 minus G3]

| $ -999,999 – 9,999,997 |

Business Income

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

| 1. Yes || 5. No | → GO TO G12
↓

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

| 1. One | → GO TO G7A | 2. Two || 3. Three || 4. Four || 5. Five || DK/RF | → GO TO G12
↓

G7. [*FIRST ITERATION*: I'll be asking this next series of questions about each business separately. We can begin with whichever business you choose. / *ALL OTHERS*: And now some questions about the next business.]
- ENTER [1] to continue

| 1. Continue |

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

| String 500 |

G7B. Business #[1 – 5]

What was the name of (the/that) business?

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

String 25

G8. Business #[1 – 5]: [G7B]

Who in the family owned that business?

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

1 – 24. [CYNAMF CYNAML, CYAQRTH, CYFUHU]	*(CYAQSN list of PYEAR FU Members:*
97. Owner not on family list → G8SPEC. Who was that? (String 100)	*CYFUHU=FU, FUMI≤PYR, MO≥PYR, DECD≥PYR, MILIT, EDUC, HLTH, OTHR)*

G9A. Business #[1 – 5]: [G7B]

Did [you / HEAD] put in any work time for this business in [PYEAR]?

- **PROBE if inconsistent with employment section**

1. Yes 5. No → GO TO G9BB RULE

↓

G9B. Business #[1 – 5]: [G7B]

Did you tell me about this work earlier?
Let me remind you, the jobs we talked about were:

- **READ employers Head worked for in [PYEAR]:**
  1 – 10. [EMPLOYER/DK] *(List of all PYEAR Employers from Employment EHC)*

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

↓

G9J1H. Business #[1 – 5]: [G7B]

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

- **ENTER [1] to continue**

1. Continue

G9J3H. Business #[1 – 5]: [G7B]

What was [your / HEAD's] occupation? What sort of work did [you / he / she] do? What were [your / his / her] most important activities or duties?

String 500

G9J3AH. Business #[1 – 5]: [G7B]

What was the official title of [your / HEAD's] job? (The title that the business used.)

String 200

G9J3BH. Business #[1 – 5]: [G7B]

On a typical day, how many minutes was [your / his / her] round trip commute to and from work (for the business)?

- If R says "it varies", ENTER [996]
- If R says "doesn't commute" (e.g. self-employed, works from home), ENTER [997]

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

G9J4H. Business #[1 – 5]: [G7B]

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

| 1 – 52 |

G9J5H. Business #[1 – 5]: [G7B]

On average, how many hours a week did [you / he / she] work at this business?

| 1 – 112 |

G9J6HMO. Business #[1 – 5]: [G7B]

In what month and year did [you / he / she] start working at this business?
- SELECT Month and [Enter] to go to next screen for year

1. January	2. February	3. March	4. April	5. May
6. June	7. July	8. August	9. September	10. October
11. November	12. December	21. Winter	22. Spring	23. Summer	24. Fall

G9J6HYR. Business #[1 – 5]: [G7B]
- The month entered is: [9J6HMO]
- ENTER the year below

1901– [PYEAR]   Actual year
9997   Before [P2YEAR, DK exact year]

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

G9J7H. Business #[1 – 5]: [G7B]

In which months during [PYEAR] [were / was] [you / he / she] working at this business?
- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December |
| 13. All |

G9J8H. Business #[1 – 5]: [G7B]

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

| 1. Yes | 5. No | → GO TO G9BB RULE

↓

G9J9HMO. Business #[1 – 5]: [G7B]

In what month and year was that?
- SELECT Month and [Enter] to go to next screen for year

1. January	2. February	3. March	4. April
5. May	6. June	7. July	8. August
9. September	10. October	11. November	12. December
21. Winter	22. Spring	23. Summer	24. Fall

G9J9HYR. Business #[1 – 5]: [G7B]

The month entered is: [G9J9HMO]
- ENTER the year below

9996   [PYEAR] or [CYEAR] and DK which

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

G9J10H. Business #[1 – 5]: [G7B]
What happened – did it go out of business, did [you / he / she] quit, or what?
String 500

G9BB RULE. WHETHER WIFE/"WIFE" IN FU (CYFUHU=1, 4 & CYAQRTH=202, 222)

WIFE/"WIFE" IN FU ALL OTHERS → GO TO G10
↓

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

G9D. Business #[1 – 5]: [G7B]
Did you tell me about this work earlier?
Let me remind you, the jobs we talked about were:
• READ employers Wife/"Wife" worked for in [PYEAR]:
1 – 10. [EMPLOYER/DK] *(List of PYEAR Employers from Employment EHC)*

1. Yes, these work hours were reported → GO TO G10   5. No, these work hours were not reported
↓

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

G9J3W. Business #[1 – 5]: [G7B]
What was [your / her] occupation? What sort of work did [you / she] do? What were [your / her] most important activities or duties?
String 500

G9J3AW. Business #[1 – 5]: [G7B]
What was the official title of [your / WIFE's/"WIFE's"] job? (The title that the business used.)
String 200

G9J3BW. Business #[1 – 5]: [G7B]
On a typical day, how many minutes was [your / her] round trip commute to and from work (for the business)?
• If R says "it varies", ENTER [996]
• If R says "doesn't commute" (e.g. self-employed, works from home), ENTER [997]
1 – 900 996. It varies (VOL) 997. No commute (VOL)

G9J4W. Business #[1 – 5]: [G7B]
And, how many weeks did [you / she] work at this business in [PYEAR]?
| 1 – 52 |

G9J5W. Business #[1 – 5]: [G7B]
On average, how many hours a week did [you / she] work at this business?
| 1 – 112 |

G9J6WMO. Business #[1 – 5]: [G7B]
In what month and year did [you / she] start working at this business?
- SELECT Month and [Enter] to go to next screen for year

1. January	2. February	3. March	4. April	5. May	
6. June	7. July	8. August	9. September	10. October	
11. November	12. December	21. Winter	22. Spring	23. Summer	24. Fall

G9J6WYR. Business #[1 – 5]: [G7B]
- The month entered is: [G9J6WMO]
- ENTER the year below
1901 – [PYEAR]   Actual year
9997   Before [P2YEAR, DK exact year]

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

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

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December
13. All					

G9J8W. Business #[1 – 5]: [G7B]
[Have / Has] [you / she] stopped working at this business?
| 1. Yes | 5. No | → GO TO G10
        ↓

   G9J9WMO. Business #[1 – 5]: [G7B]
   In what month and year was that?
   - SELECT Month and [Enter] to go to next screen for year

1. January	2. February	3. March	4. April
5. May	6. June	7. July	8. August
9. September	10. October	11. November	12. December
21. Winter	22. Spring	23. Summer	24. Fall

   G9J9WYR. Business #[1 – 5]: [G7B]
   The month entered is: [G9J9WMO]
   - ENTER the year below
   9997   [PYEAR] or [CYEAR] and DK which

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

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

String 500

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

1. Corporation → GO TO G11C RULE   2. Unincorporated   7. Other-specify → G10SPEC. Specify
↓   (String 100)

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

$ 0 – 9,999,997

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

$ 0 – 9,999,997

G11B. Business #[1 – 5]: [G7B]
That left a net income of?
- If needed: Total Receipts - Total Expenses = $[G11 minus G11A]

$ -999,999 – 9,999,997

G11C RULE. NUMBER OF BUSINESSES AT G6

MORE BUSINESSES → REPEAT G7A–G11B;   5. ALL OTHERS → GO TO G73 RULE
↓   MAX=5; THEN GO TO G12

Head-Work Income

G12. Did [you / HEAD] earn wages or salaries in [PYEAR] from working on any jobs [*G9A=YES AND G10=2*: besides the unincorporated business we have just talked about]? Let me remind you, the jobs we talked about were:
- IF necessary, review employment history and add: including wages or salaries from the job(s) we already talked about?
- READ Employers Head worked for in [PYEAR]:
  1 – 10. [EMPLOYER/DK] *(List of all PYEAR Employers from Employment EHC)*

1. Yes → GO TO G13   5. No
↓

G12 RULE. WHETHER HEAD HAD JOB PYEAR (HEADJOBS.BCWTRP1YEAR) OR WORKED PYEAR FOR AN INCORPORATED BUSINESS (G9A=YES & G10=CORPORATION)

[PYEAR] JOB   NO [PYEAR] JOB OR WORKED FOR   ALL OTHERS → GO TO G16
              CORPORATION BIZ IN [PYEAR]
↓

G12 HARD CHECK. IF G12=$0 AND ([PYEAR] JOB OR WORKS FOR CORP BIZ:
HEAD [HAS A JOB IN EHC] [OR] [WORKED FOR AN INCORPORATED
BUSINESS] IN [PYEAR] BUT HAS NO WAGES OR SALARY IN G12. PROBE:
[Were / Was] there any wage(s) or salary(s) from [this / these] job[s]?
If "YES", PRESS [Enter] or SELECT [Go To], to go to G12 & ENTER [Yes].
If "NO", SELECT [Supress] to go to G12A & record explanation.

| 1. Yes | → RETURN TO G12 | 5. No |

↓

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

| String 500 |

GO TO G16

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

$ 1 – 9,999,997

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

1. Yes → GO TO G16A   5. No → GO TO G17F

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

1. Yes   5. No → GO TO G18A

↓

G16A. Which was that?
- ENTER all that apply
- PROBE: Any others?

1. Bonuses	→ G17A. How much was from bonuses?	$ 1 – 999,997
2. Overtime	→ G17B. How much was from overtime?	$ 1 – 999,997
3. Tips	→ G17C. How much was from tips?	$ 1 – 999,997
4. Commissions	→ G17D. How much was from	$ 1 – 999,997
7. Other-specify	→ G16B. What was that other job-related income from?	→ G17E. How much was from other job related income?

| String 500 | | $ 1 – 999,997 |

G17F. Reported Incomes: [Wages/salaries, bonus, overtime, tips, commissions, other job-related income]
Did you tell me earlier about all the jobs that go with (this / these) income(s)? The jobs we talked about
were:
- READ employers Head worked for in [PYEAR]:
  1 – 10. [EMPLOYER/DK] *(List of all PYEAR Employers from Employment EHC)*

| 1. Yes, R reported all jobs that produced this income | → GO TO G18A | 5. No, R did not report all jobs that produced this income |

↓

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

| 1. Federal government | 2. State government | 3. Local government | 4. Private non-government |

| 5. Self-employed | 7. Other-specify | → G17J1SPEC. Specify (String 100)

G17J2. What was the name of that employer?
- IF necessary: This information will help us to process employment information you gave us. The name itself will never be released as part of data from the study.
- IWER: IF no employer name is given by R, ask for job title or anything that can help identify the job.

String 25

G17J3. What was [your / HEAD's] occupation? What sort of work did [you / he / she] do? What were [your / his / her] most important activities or duties?

String 500

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

String 500

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

String 200

G17J3D. On a typical day, how many minutes was [your / his / her] round trip commute to and from work?
- If R says "it varies", ENTER [996]
- If R says "doesn't commute" (e.g. self-employed, works from home), ENTER [997]

| 1 – 900 | 996. It varies (VOL) | 997. No commute (VOL) |

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

1 – 52

G17J5. On average, how many hours a week did [you / he / she] work?

1 – 112

G17J6MO. In what month and year did [you / he / she] start this work?
- SELECT Month and [Enter] to go to next screen for year

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December
21. Winter	22. Spring	23. Summer	24. Fall		

G17J6YR. The month entered is: [G17J6MO]
- ENTER the year below
- 9997   Before [P2YEAR], DK exact year

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

G17J7. In which months during [PYEAR] [were / was] [you / he / she] working at it?

- ENTER all that apply

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December
13. All					

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

| 1. Yes | 5. No | → GO TO G18A |

↓

G17J9MO. In what month and year was that?

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

1. January	2. February	3. March	4. April	5. May	
6. June	7. July	8. August	9. September	10. October	
11. November	12. December	21. Winter	22. Spring	23. Summer	24. Fall

G17J9YR. The month entered is: [G17J9MO]

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

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

G17J10. What happened – did [your / his / her] employer close or go out of business, did [you / he / she] quit, or what?

| String 500 |

Head-Professional Practice or Trade

G18A. I'm going to read you a list of other sources of income you might have had.

Did [you / HEAD] receive any other income in [PYEAR] from professional practice or trade?

| 1. Yes | 5. No | → GO TO G18B |

↓

G19A. How much was it?

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

| $ 1 – 9,999,997 | DK/RF | → GO TO G20A |

↓

G19APER. The amount entered is: [G19A] per __

- SELECT the unit of time below

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

| 7. Other-specify | → G19APERSPEC. Specify. (String 100) |

G20A. During which months of [PYEAR] did [you / he / she] get this income?

- ENTER all that apply

1. January	2. February	3. March	4. April	5. May	6. June	
7. July	8. August	9. September	10. October	11. November	12. December	13. All

G21ACKPT. Reported Incomes: Professional Practice or Trade
- Did you tell me earlier about all the jobs that go with this income? The jobs we talked about were:
- READ employers Head worked for in [PYEAR]:
  1 – 10. [EMPLOYER/DK] *(List of all PYEAR Employers from Employment EHC)*

1. Yes, R reported all jobs that produced this	→ GO TO G18B	5. No, R did not report all jobs that produced this income

↓

G18AJ1. Then I would like to ask you some questions now about the work [you / he / she] did for this income. Did [you / he / she] work for the federal, state or local government, a private company, or what?

1. Federal government	2. State government	3. Local government	4. Private non-government
5. Self-employed	7. Other-specify	→ G18AJ1SPEC. Specify (String 100)	

G18AJ2. What was the name of that employer?
- IF NECESSARY: This information will help us to process employment information you gave us. The name itself will never be released as part of data from the study.
- IWER: IF no employer name is given by R, ask for job title or anything that can help identify the job.

String 25

G18AJ3. What was [your / his / her] occupation? What sort of work did [you / he / she] do? What were [your / his] most important activities or duties?

String 500

G18AJ3B. What kind of business or industry was that in?

String 500

G18AJ3C. What was the official title of [your / HEAD's] job? (The title that [your / his / her] employer used.)

String 200

G18AJ3D. On a typical day, how many minutes was [your / his / her] round trip commute to and from work?
- If R says "it varies", ENTER [996]
- If R says "doesn't commute" (e.g. self-employed, works from home), ENTER [997]

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

G18AJ4. And, how many weeks did [you / he / she] work at this in [PYEAR]?

1 – 52

G18AJ5. On average, how many hours a week did [you / he / she] work?

1 – 112

G18AJ6MO. In what month and year did [you / he / she] start this work?
- SELECT Month and [Enter] to go to next screen for year

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December
21. Winter	22. Spring	23. Summer	24. Fall		

G18AJ6YR. The month entered is: [G18AJ6MO]
- ENTER the year below
9997   Before [P2YEAR], DK exact year

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

G18AJ7. In which months during [PYEAR] [were / was] [you / he / she] working at it?
- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June | |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

G18AJ8. [Have / Has] [you / he / she] stopped this work?

| 1. Yes | 5. No | → GO TO G18B

↓

G18AJ9MO. In what month and year was that?
- SELECT Month and [Enter] to go to next screen for year

1. January	2. February	3. March	4. April	5. May
6. June	7. July	8. August	9. September	10. October
11. November	12. December	21. Winter	22. Spring	23. Summer	24. Fall

G18AJ9YR. The month entered is: [G18AJ9MO]
- ENTER the year below
9996   [PYEAR] or [CYEAR] and DK which

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

G18AJ10. What happened – did [your / his / her] employer close or go out of business, did [you / he / she] quit, or what?

| String 500 |

Head-Farming or Market Gardening

G18B. [*BC28=YES*: Besides the farm income you already told me about,] did [you / HEAD] receive any other income in [PYEAR] from farming or market gardening?

| 1. Yes | 5. No | → GO TO G18C

↓

G19B. How much was it?
- ENTER amount here, then ENTER unit of time on next screen (Day, Week, Two weeks, Month, Year)

| $ 1 – 9, 999,997 | DK/RF | → GO TO G20B

↓

G19BPER. The amount entered is: [G19B] per __
- SELECT the unit of time below

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

7. Other-specify	→ G19BPERSPEC. Specify. (String 100)

G20B. During which months of [PYEAR] did [you / he / she] get this income?
- ENTER all that apply

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December	13. All

G21BCKPT. Reported Incomes: Farming or Market Gardening
- Did you tell me earlier about all the jobs that go with this income? The jobs we talked about were:
- READ employers Head worked for in [PYEAR]:
  1 – 10. [EMPLOYER/DK] *(List of all PYEAR Employers from Employment EHC)*

1. Yes, R reported all jobs that produced this income	→ GO TO G18C	5. No, R did not report all jobs that produced this income

↓

G18BJ1. Then I would like to ask you some questions now about the work [you / HEAD] did for this income. Did [you / he / she] work for the federal, state or local government, a private company, or what?

1. Federal government	2. State government	3. Local government	4. Private non-government
5. Self-employed	7. Other-specify	→ G18BJ1SPEC. Specify (String 100)

G18BJ2. What was the name of that employer?
- IF necessary: This information will help us to process employment information you gave us. The name itself will never be released as part of data from the study.
- IWER: IF no employer name is given by R, ask for job title or anything that can help identify the job.

String 25

G18BJ3. What was [your / his / her] occupation? What sort of work did [you / he / she] do? What were [your / his / her] most important activities or duties?

String 500

G18BJ3B. What kind of business or industry was that in?

String 500

G18BJ3C. What was the official title of [your / HEAD's] job? (The title that [your / his / her] employer used.)

String 200

G18BJ3D. On a typical day, how many minutes was [your / his / her] round trip commute to and from work?
- If R says "it varies", ENTER [996]
- If R says "doesn't commute" (e.g. self-employed, works from home), ENTER [997]

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

G18BJ4. And, how many weeks did [you / he / she] work at this in [PYEAR]?

| 1 – 52 |

G18BJ5. On average, how many hours a week did [you / he / she] work?

| 1 – 112 |

G18BJ6MO. In what month and year did [you / he / she] start this work?
- SELECT Month and [Enter] to go to next screen for year

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December
21. Winter	22. Spring	23. Summer	24. Fall		

G18AJ6YR. The month entered is: [G18BJ6MO]
- ENTER the year below
9997   Before [P2YEAR], DK exact year

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

G18BJ7. In which months during [PYEAR] [were / was] [you / he / she] working at it?
- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June | |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

G18BJ8. [Have / Has] [you / he / she] stopped this work?

| 1. Yes | | 5. No | → GO TO G18C

    ↓

G18BJ9MO. In what month and year was that?
- SELECT Month and [Enter] to go to next screen for year

1. January	2. February	3. March	4. April	5. May
6. June	7. July	8. August	9. September	10. October
11. November	12. December	21. Winter	22. Spring	23. Summer	24. Fall

G18BJ9YR. The month entered is: [G18BJ9MO]
- ENTER the year below
9996   [PYEAR] or [CYEAR] and DK which

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

G18BJ10. What happened – did [your / his / her] employer close or go out of business, did [you / he / she] quit, or what?

| String 500 |

Head-Roomers or Boarders

G18C. (Did [you / HEAD] receive any other income in [PYEAR]) from roomers or boarders?

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

| 1. Yes | 5. No | → GO TO G22

↓

G19C. How much was it?

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

| $ 1 – 9,999,997 | DK/RF | → GO TO G20C

↓

G19CPER. The amount entered is: [G19C] per __

- SELECT the unit of time below

| 2. Day | 3. Week | 4. Two weeks | 5. Month | 6. Year |
| 7. Other-specify | → G19CPERSPEC. Specify. (String 100)

G20C. During which months of [PYEAR] did [you / he / she] get this income?

- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

G21CCKPT. Reported incomes: Roomers or Boarders

Did you tell me earlier about all the jobs that go with this income? The jobs we talked about were:

- READ employers HEAD worked for in [PYEAR]:
  1 – 10. [EMPLOYER/DK] *(List of all PYEAR Employers from Employment EHC)*

| 1. Yes, R reported all jobs that produced this | → GO TO G22CKPT | 5. No, R did not report all jobs that produced this income |

↓

G18CJ1. Then I would like to ask you some questions now about the work [you / HEAD] did for this income. Did [you / he / she] work for the federal, state or local government, a private company, or what?

| 1. Federal government | 2. State government | 3. Local government | 4. Private non-government |
| 5. Self-employed | 7. Other-specify | → G18CJ1SPEC. Specify (String 100)

G18CJ2. What was the name of that employer?

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

| String 25 |

G18CJ3. What was [your / HEAD's] occupation? What sort of work did [you / he / she] do? What were [your / his / her] most important activities or duties?

| String 500 |

G18CJ3B. What kind of business or industry was that in?

| String 500 |

G18CJ3C. What was the official title of [your / HEAD's] job? (The title that [your / his / her] employer used.)

| String 200 |

G18CJ3D. On a typical day, how many minutes was [your / his / her] round trip commute to and from work?
- If R says "it varies", ENTER [996]
- If R says "doesn't commute" (e.g. self-employed, works from home), ENTER [997]

| 1 – 900 | | 996. It varies (VOL) | | 997. No commute (VOL) |

G18CJ4. And, how many weeks did [you / he / she] work at this in [PYEAR]?

| 1 – 52 |

G18CJ5. On average, how many hours a week did [you / he / she] work?

| 1 – 112 |

G18CJ6MO. In what month and year did [you / he / she] start this work?
- SELECT Month and [Enter] to go to next screen for year

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December
21. Winter	22. Spring	23. Summer	24. Fall		

G18CJ6YR. The month entered is: [G18CJ6MO]
- ENTER the year below
9997   Before [P2YEAR], DK exact year

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

G18CJ7. In which months during [PYEAR] [were / was] [you / he / she] working at it?
- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June | |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

G18CJ8. [Have / Has] [you / he / she] stopped this work?

| 1. Yes | | 5. No | → GO TO G22CKPT

     ↓

G18CJ9MO. In what month and year was that?
- SELECT Month and [Enter] to go to next screen for year

1. January	2. February	3. March	4. April	5. May
6. June	7. July	8. August	9. September	10. October
11. November	12. December	21. Winter	22. Spring	23. Summer	24. Fall

G18CJ9YR. The month entered is: [G18CJ9MO]
- ENTER the year below
9996   [PYEAR] or [CYEAR] and DK which

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

G18CJ10. What happened—did [your / his / her] employer close or go out of business, did [you / he / she] quit, or what?

String 500

G22CKPT. CAI CHECKPOINT: NUMBER OF JOBS PYEAR AT BC18

> 1. MORE THAN ONE JOB IN [PYEAR] | 5. ALL OTHERS | → GO TO G25A
> ↓

G23. Did you include [your / HEAD's] earnings from **all** of [your / his / her] jobs in the amounts we just talked about?

1. Yes | → GO TO G25A   5. No
↓

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

$ 1 – 9,999,997

Head-Rent
G25A. Did [you / HEAD] receive any (other) income in [PYEAR] from rent?

1. Yes | 5. No | → GO TO G25B
↓

G26A. How much was it?
- ENTER amount here, then ENTER unit of time on next screen (Week, Two weeks, Month, Year)

$ 1 – 999,997 | DK/RF | → GO TO G26A1CKPT
↓

G26APER. The amount entered is: [G26A] per __
- SELECT the unit of time below

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

7. Other-specify | → G26APERSPEC. Specify. (String 100)

G26A1CKPT. CAI CHECKPOINT: WHETHER WIFE/"WIFE" IN FU (CYFUHU=1, 4 & CYAQRTH=202, 222)

> 1. WIFE/"WIFE" IN FU | 5. ALL OTHERS | → GO TO G27A
> ↓

G26A2. Does that include [your / your wife's / WIFE's/"WIFE's"] share?

1. Yes | 5. No

G27A. During which months of [PYEAR] did [you / HEAD] get this income?
- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

Head-Dividends

G25B. (Did [you / HEAD] receive any other income in [PYEAR]…)

From dividends?

| 1. Yes | 5. No | → GO TO G25C

↓

G26B. How much was it?

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

| \$ 1 – 999,997 | DK/RF | → GO TO G26B1CKPT

↓

G26BPER. The amount entered is: [G26B] per __

- SELECT the unit of time below

| 5. Month | 6. Year | 7. Other-specify | → G26BPERSPEC. Specify. (String 100)

G26B1CKPT. CAI CHECKPOINT: WHETHER WIFE/"WIFE" IN FU (CYFUHU=1, 4 & CYAQRTH=202, 222)

| 1. WIFE/"WIFE" IN FU | 5. ALL OTHERS | → GO TO G27B

↓

G26B2. Does that include [your / your wife's / WIFE's/"WIFE's"] dividends?

| 1. Yes | 5. No |

G27B. During which months of [PYEAR] did [you / HEAD] get this income?

- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

Head-Interest

G25C. (Did [you / HEAD] receive any other income in [PYEAR]…)

From interest?

| 1. Yes | 5. No | → GO TO G25D

↓

G26C. How much was it?

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

| \$ 1 – 999,997 | DK/RF | → GO TO G26C1CKPT

↓

G26CPER. The amount entered is: [G26C] per __

- SELECT the unit of time below

| 3. Week | 4. Two weeks | 5. Month | 6. Year |
| 7. Other-specify | → G26CPERSPEC. Specify. (String 100)

G26C1CKPT. CAI CHECKPOINT: WHETHER WIFE/"WIFE" IN FU (CYFUHU=1, 4 & CYAQRTH=202, 222)

| 1. WIFE/"WIFE" IN FU | 5. ALL OTHERS | → GO TO G27C

↓

G26C2. Does that include [your / your wife's /"WIFE's/"WIFE's"] interest?

| 1. Yes | 5. No |

G27C. During which months of [PYEAR] did [you / HEAD] get this income?
- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

Head-Trust Funds and Royalties

G25D. (Did [you / HEAD] receive any other income in [PYEAR]…)

From trust funds and royalties?

| 1. Yes | 5. No | → GO TO G25E

↓

G26D. How much was it?
- ENTER amount here, then ENTER unit of time on next screen (Month, Year)

| $ 1 – 999,997 | DK/RF | → GO TO G27D

↓

G26DPER. The amount entered is: [G26D] per __
- SELECT the unit of time below

| 5. Month | 6. Year | 7. Other-specify | → G26DPERSPEC. Specify. (String 100)

G27D. During which months of [PYEAR] did [you / HEAD] get this income?
- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

Head-TANF

G25E. (Did [you / HEAD] receive any income in [PYEAR]…)

From TANF (Temporary Assistance for Needy Families) [*PYSTATERESIDE≠FC/DK/RF*: or [STATEPROG2]] formerly called ADC or AFDC?

| 1. Yes | 5. No | → GO TO G25F

↓

G26E. How much was it?
- ENTER amount here, then ENTER unit of time on next screen (Two weeks, Month, Year)

| $ 1 – 999,997 | DK/RF | → GO TO G27E

↓

G26EPER. The amount entered is: [G26E] per __
- SELECT the unit of time below

| 4. Two weeks | 5. Month | 6. Year |
| 7. Other-specify | → G26EPERSPEC. Specify. (String 100)

G27E. During which months of [PYEAR] did [you / HEAD] get this income?
- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

G27EE. Who in the family was covered by this?
- ENTER all that apply
- PROBE: Any others?

| 1 – 24. [CYNAMF CYNAML, CYAQRTH, CYFUHU] | *(CYAQSN list of PYEAR FU Members: CYFUHU=FU, FUMI≤PYR, MO≥PYR, DECD≥PYR, MILIT, EDUC, HLTH, OTHR)* |

Head-SSI

G25F. (Did [you / HEAD] receive any income in [PYEAR]…)
   From Supplemental Security Income?
- SSI (Supplemental Security Income) is **not** Social Security, although the Social Security Administration administers the program and a person can receive both. See F1-Help for more information.

| 1. Yes | 5. No | → GO TO G25G

↓

G25FF. Did [you / HEAD] receive it for [yourself / himself / herself], or for someone else?

| 1. Self | → GO TO G26F | 2. Someone else | 3. Both | DK/RF | → GO TO G26F

↓

G25FFF. Let's talk about the other person's Supplemental Security when we talk about their income.
- ENTER [1] to continue

| 1. Continue |

G25F4 RULE. WHETHER SSI FOR SOMEONE ELSE (G25FF=2) OR BOTH (G25FF=3)

| SOMEONE ELSE | → GO TO G25G | BOTH |
| | | ↓ |

G26F. How much was [*G25FF=SELF*: it / *ALL OTHERS*: the Supplemental Security Income [you / he / she] received for [yourself / himself / herself]]?
- ENTER amount here, then ENTER unit of time on next screen (Month, Year)

| $ 1 – 999,997 | DK/RF | → GO TO G27F

↓

G26FPER. The amount entered is: [G26F] per __
- SELECT the unit of time below

| 5. Month | 6. Year | 7. Other-specify | → G26FPERSPEC. Specify. (String 100)

G27F. During which months of [PYEAR] did [you / HEAD] get this income?
- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

-Other Welfare

G25G. (Did [you / HEAD] receive any income in [PYEAR]…)
From other welfare?

| 1. Yes | 5. No | → GO TO G31

↓

G26G. How much was it?
- ENTER amount here, then ENTER unit of time on next screen (Week, Two weeks, Month, Year)

| $ 1 – 999,997 | DK/RF | → GO TO G27G

↓

G26GPER. The amount entered is: [G26G] per __
- SELECT the unit of time below

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

| 7. Other-specify | → G26GPERSPEC. Specify. (String 100)

G27G. During which months of [PYEAR] did [you / HEAD] get this income?
- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

Head-Social Security

G31. Did [you / HEAD] [*PYEAR FU COUNT>1*: or anyone else in the family there] receive any income in [PYEAR] from Social Security, such as disability, retirement or survivor's benefits?
- All Social Security received by any FU member must be reported here.

| 1. Yes | 5. No | → GO TO G37

↓

G32. Who was that?
- ENTER all that apply
- PROBE: Any others?

| 1 – 24. [CYNAMF CYNAML, CYAQRTH, CYFUHU] | *(CYAQSN list of HEAD (CYFUHU=FU, FUMI; CYAQRTH=101, 102), WIFE/"WIFE" (CYFUHU=FU, FUMI; CYAQRTH=202, 222) & PYEAR OFUM*

G33A. [First / Next] let me ask about [your / G32's] Social Security.
Was that disability, retirement, survivor's benefits, or what?
- ENTER all that apply
- PROBE: Any others?

| 1. Disability | 2. Retirement | 3. Survivor's benefits | 5. Dependent of disabled recipient |
| 6. Dependent of retired recipient | 7. Other-specify | → G33ASPEC. Specify. (String 100)

G34. How much was the total amount from Social Security? [*2+ SOCSEC INCOMES*: Please include all amounts from all types of Social Security [you / [G32]] received in [PYEAR].]
- ENTER amount here, then ENTER unit of time on next screen (Month, Year)

| $ 1 – 999,997 | DK/RF | → GO TO G35

↓

G34PER. The amount entered is: [G34] per __
- SELECT the unit of time below

| 5. Month | 6. Year | 7. Other-specify | → G34PERSPEC. Specify. (String 100)

G35. During which months of [PYEAR] did [you / G32] get this income? [*2+ SOCSEC INCOMES*: (This includes all types of Social Security [you / [G32]] received in [PYEAR].)]
- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

G35 RULE. WHETHER MORE INDIVIDUALS RECEIVE SOCIAL SECURITY AT G32

| MORE FU MEMBERS | → REPEAT G33A–G35; | ALL OTHERS |
| | MAX=24; THEN GO TO G37 | ↓ |

Head-VA Pensions

G37A. Did [you / HEAD] receive any income in [PYEAR] from the Veteran's Administration for a servicemen's, widow's, or survivor's pension, service disability, or the GI bill?
- ENTER all that apply
- PROBE: Any others?

1. Yes, servicemen's, widow's, or survivor's pension	2. Yes, service disability
3. Yes, GI bill	4. Yes, other-specify	→ G37ASPEC. Specify. (String 100)	5. No
	↓		GO TO G40

G38. How much was the total amount? [*2+ VA INCOMES*: Please include all amounts from all types of VA (Veteran's Administration) income [you / he / she] received in [PYEAR].]
- ENTER amount here, then ENTER unit of time on next screen (Month, Year)

$ 1 – 999,997 | DK/RF | → GO TO G39
↓

G38PER. The amount entered is: [G38] per __
- SELECT the unit of time below

5. Month | 6. Year | 7. Other-specify | → G38PERSPEC. Specify. (String 100)

G39. During which months of [PYEAR] did [you / HEAD] get this income? [*2+ VA INCOMES*: (This includes all types of VA (Veteran's Administration) income [you / he / she] received in [PYEAR].)]
- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

Head-Other Retirement

G40. Did [you / HEAD] receive any income in [PYEAR] from other retirement pay, pensions, or annuities?
- ENTER all that apply
- PROBE: Any others?

1. Yes, retirement pay, pensions	ASK G41A–G42A
2. Yes, annuities, IRAs	ASK G41B–G42B
3. Yes, other - specify	ASK G41C–G42C
5. No	→ GO TO G44A

G40=Retirement Pay, Pensions

G41A. How much was from retirement pay, pensions?
- ENTER amount here, then ENTER unit of time on next screen (Month, Year)

$1 – 999,997 | DK/RF → GO TO G42A

↓

G41APER. The amount entered is: [G41A] per __
- SELECT the unit of time below

5. Month | 6. Year | 7. Other-specify → G41APERSPEC. Specify. (String 100)

G42A. During which months of [PYEAR] did [you / he / she] get this income?
- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June | |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

G40=Annuities, IRAs

G41B. How much was from annuities?
- ENTER amount here, then ENTER unit of time on next screen (Month, Year)

$1 – 999,997 | DK/RF → GO TO G42B

↓

G41BPER. The amount entered is: [G41B] per __
- SELECT the unit of time below

5. Month | 6. Year | 7. Other-specify → G41BPERSPEC. Specify. (String 100)

G42B. During which months of [PYEAR] did [you / HEAD] get this income?
- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June | |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

G40=Other

G41C. How much was the other income?
- ENTER amount here, then ENTER unit of time on next screen (Month, Year)

$1 – 999,997 | DK/RF → GO TO G41C1

↓

G41CPER. The amount entered is: [G41C] per __
- SELECT the unit of time below

5. Month | 6. Year | 7. Other-specify → G41CPERSPEC. Specify. (String 100)

G41C1. What was that from?

String 200

G42C. During which months of [PYEAR] did [you / he / she] get this income?
- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June | |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

G43. (Not including Veteran's Administration pensions,) how many different pensions or annuities did [you / HEAD] receive income from in [PYEAR]?
- FOR 7 or more, ENTER [7]

| 1 – 7 |

Head-Unemployment Comp

G44A. Did [you / HEAD] receive any income in [PYEAR] from unemployment compensation?

| 1. Yes | | 5. No | → GO TO G44B

↓

G45A. How much was it?
- ENTER amount here, then ENTER unit of time on next screen (Week, Two weeks, Month, Year)

| $ 1 – 999,997 | | DK/RF | → GO TO G46A

↓

G45APER. The amount entered is: [G45A] per __
- SELECT the unit of time below

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

| 7. Other-specify | → G45APERSPEC. Specify. (String 100)

G46A. During which months of [PYEAR] did [you / he / she] get this income?
- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

Head-Workers Comp

G44B. (Did [you / HEAD] receive any income in [PYEAR]…)
From workers compensation?

| 1. Yes | | 5. No | → GO TO G44C

↓

G45B. How much was it?
- ENTER amount here, then ENTER unit of time on next screen (Month, Year)

| $ 1 – 999,997 | | DK/RF | → GO TO G46B

↓

G45BPER. The amount entered is: [G45B] per __
- SELECT the unit of time below

| 5. Month | 6. Year | | 7. Other-specify | → G45BPERSPEC. Specify. (String 100)

G46B. During which months of [PYEAR] did [you / he / she] get this income?
- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

Head-Child Support

G44C. (Did [you / HEAD] receive any income in [PYEAR]…)

From child support?

| 1. Yes | 5. No | → GO TO G44D

↓

G45C. How much was it?

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

| $ 1 – 999,997 | DK/RF | → GO TO G46C

↓

G45CPER. The amount entered is: [G45C] per __

- SELECT the unit of time below

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

| 7. Other-specify | → G45CPERSPEC. Specify. (String 100)

G46C. During which months of [PYEAR] did [you / he / she] get this income?

- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

Head-Alimony or Separate Maintenance

G44D. (Did [you / HEAD] receive any income in [PYEAR]…)

From alimony or separate maintenance?

| 1. Yes | 5. No | → GO TO G44E

↓

G45D. How much was it?

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

| $ 1 – 999,997 | DK/RF | → GO TO G46D

↓

G45DPER. The amount entered is: [G45D] per __

- SELECT the unit of time below

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

| 7. Other-specify | → G45DPERSPEC. Specify. (String 100)

G46D. During which months of [PYEAR] did [you / he / she] get this income?

- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

Head-Help From Relatives

G44E. Did [you / HEAD] receive any help in [PYEAR] from relatives?

- This must be from non-FU members.

| 1. Yes | 5. No | → GO TO G44F

↓

G45E. How much was it?

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

| $ 1 – 999,997 | DK/RF | → GO TO G46E

↓

G45EPER. The amount entered is: [G45E] per __

- SELECT the unit of time below

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

| 7. Other-specify | → G45EPERSPEC. Specify. (String 100)

G46E. During which months of [PYEAR] did [you / he / she] get this income?

- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

Head-Help From Non-Relatives

G44F. Did anyone (else) not living with [you / HEAD] help [you / HEAD] [*PYEAR FU COUNT>1*:and [your / his / her] family] out by giving [you / him / her] money during [PYEAR]?

- This must be from non-FU members.

| 1. Yes | 5. No | → GO TO G44G

↓

G45F. How much was it?

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

| $ 1 – 999,997 | DK/RF | → GO TO G46F

↓

G45FPER. The amount entered is: [G45F] per __

- SELECT the unit of time below

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

| 7. Other-specify | → G45FPERSPEC. Specify. (String 100)

G46F. During which months of [PYEAR] did [you / he / she] get this income?

- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

-Anything Else
G44G. Did [you / HEAD] receive any other income in [PYEAR] from anything else?

| 1. Yes | 5. No | → GO TO G49CKPT

↓

G45G1. What was that from?
- IF R mentions income from a job, probe for these details:
- OCC / IND: What was [your / his / her] occupation? What sort of work did [you / he / she] do?
- Start / End: What month and year did [you / he / she] start that job? End that job?
- Job Title / Commute: What was [your / his / her] official job title? On a typical day, how many minutes was [your / his / her] round trip commute to and from work?
- Work hours: How many weeks did [you / he / she] work at that job in [PYEAR]? On average, how many hours per week did [you / he / she] work in [PYEAR]?

| Open end |

G45G. How much was the income from that?
- ENTER amount here, then ENTER unit of time on next screen (Week, Two weeks, Month, Year)

| $ 1 – 999,997 | DK/RF | → GO TO G46G

↓

G45GPER. The amount entered is: [G45G] per __
- SELECT the unit of time below

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

| 7. Other-specify | → G45GPERSPEC. Specify. (String 100)

G46G. During which months of [PYEAR] did [you / he / she] get this income?
- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

Income of Wife/"Wife"
G49CKPT. CAI CHECKPOINT: WHETHER WIFE/"WIFE" IN FU (CYFUHU=1, 4 & CYAQRTH=202, 222)

| 1. WIFE/"WIFE" IN FU | 5. ALL OTHERS | → GO TO G73 RULE |
| ↓ |

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

| 1. Yes | 5. No | → GO TO G51AB RULE

↓

G51A. Was any of it earnings from [your / her] work [*G9C=YES AND G10=2*: besides the **unincorporated** business we talked about a few minutes ago]?

| 1. Yes | → GO TO G52 | 5. No |

↓

G51AB RULE. WHETHER WIFE/"WIFE" HAD JOB PYEAR (WIFEJOBS.DEWTRP1YEAR) OR WORKED PYEAR FOR AN INCORPORATED BUSINESS (G9C=YES & G10= CORPORATION)

[PYEAR] JOB	NO [PYEAR] JOB OR WORKED FOR CORPORATION BIZ IN [PYEAR]	ALL OTHERS	→ GO TO G52C RULE
↓			

G51B. Did [you / she] receive any earnings from [your / her] work [*G5=NO OR G9C=NO, DK AND G10=1*:at: / *G9C=YES AND G10=1*: the incorporated business you mentioned earlier, or at:]?
- READ employers Wife/"Wife" worked for in [PYEAR]:
  1 – 10. [EMPLOYER/DK] *(List of all PYEAR Employers from Employment EHC)*

1. Yes	→ GO TO G52	5. No

  ↓

  G51C. How is it that [you / she] worked, but did not receive earnings from it?
String 500

Wife/"Wife"-Work Income

G52. How much did [you / she] earn altogether from work in [PYEAR], that is, before anything was deducted for taxes or other things?
$ 1 – 9,999,997

G52A. During which months of [PYEAR] did [you / she] get this income?
- ENTER all that apply

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December	13. All

G52BCKPT. Reported incomes: Wages / Salaries
Did you tell me earlier about all the jobs that go with this income? The jobs we talked about were:
- READ employers Wife/"Wife" worked for in [PYEAR]:
  1 – 10. [EMPLOYER/DK] *(List of all PYEAR Employers from Employment EHC)*

1. Yes, R reported all jobs that produced this income	→ GO TO G52C RULE	5. No, R did not report all jobs that produced this income

↓

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

1. Federal government	2. State government	3. Local government	4. Private non-government
5. Self-employed	7. Other-specify	→ G52J1SPEC. Specify (String 100)	

G52J2. What was the name of that employer?
- IF necessary: This information will help us to process employment information you gave us. The name itself will never be released as part of the data from the study.
- IF no employer name is given by R, ask for job title or anything that can help identify the job.

String 25

G52J3. What was [your / her] occupation? What sort of work did [you / she] do? What were [your / her] most important activities or duties?
String 500

G52J3B. What kind of business or industry was that in?

> String 500

G52J3C. What was the official title of [your / WIFE's/"WIFE's"] job? (The title that [your / her] employer used.)

> String 200

G52J3D. On a typical day, how many minutes was [your / her] round trip commute to and from work?
> - If R says "it varies", ENTER [996]
> - If R says "doesn't commute" (e.g. self-employed, works from home), ENTER [997]
>
> 1 – 900 | 996. It varies (VOL) | 997. No commute (VOL)

G52J4. And, how many weeks did [you / she] work at this in [PYEAR]?

> 1 – 52

G52J5. On average, how many hours a week did [you / she] work?

> 1 – 112

G52J6MO. In what month and year did [you / she] start this work?
> - SELECT Month and [Enter] to go to next screen for year

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December
21. Winter	22. Spring	23. Summer	24. Fall		

G52J6YR. The month entered is: [G52J6MO]
> - ENTER the year below
> - 9997 Before [P2YEAR], DK exact year
>
> 1901 – [PYEAR] | 9997. Before [P2YEAR] , DK Exact Year

G52J7. In which months during [PYEAR] [were / was] [you / she] working at it?
> - ENTER all that apply

1. January	2. February	3. March	4. April	5. May	6. June	
7. July	8. August	9. September	10. October	11. November	12. December	13. All

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

> 1. Yes | 5. No → GO TO G52C RULE

↓

> G52J9. In what month and year was that?
> > - SELECT Month and [Enter] to go to next screen for year
> >
> > | 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
> > |---|---|---|---|---|---|
> > | 7. July | 8. August | 9. September | 10. October | 11. November | 12. December |
> > | 21. Winter | 22. Spring | 23. Summer | 24. Fall | | |

G17J9YR. The month entered is: [G17J9MO]
- ENTER the year below
9996   [PYEAR] or [CYEAR] and DK which

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

G52J10. What happened – did [your / her] employer close or go out of business, did [you / she] quit, or what?

| String 500 |

G52C RULE. WHETHER WIFE/"WIFE" HAD INCOME IN PYEAR (G50=YES OR G51B=YES)

| WIFE/"WIFE" HAD INCOME IN [PYEAR] | 5. ALL OTHERS | → GO TO G73 RULE |
| ↓ |

Wife/"Wife"-Unemployment Comp
G53. Did [you / she] receive any unemployment compensation in [PYEAR]?

| 1. Yes | 5. No | → GO TO G56 |

↓

G54. How much was that?
- ENTER amount here, then ENTER unit of time on next screen (Week, Two weeks, Month, Year)

| $ 1 – 999,997 | DK/RF | → GO TO G55 |

↓

G54PER. The amount entered is: [G54] per __
- SELECT the unit of time below

| 3. Week | 4. Two weeks | 5. Month | 6. Year |
| 7. Other-specify | → G54PERSPEC. Specify. (String 100) |

G55. During which months of [PYEAR] did [you / she] get this income?
- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

Wife/"Wife"-Workers Comp
G56. Did [you / she] receive any workers compensation in [PYEAR]?

| 1. Yes | 5. No | → GO TO G59 |

↓

G57. How much was that?
- ENTER amount here, then ENTER unit of time on next screen (Week, Two weeks, Month, Year)

| $ 1 – 999,997 | DK/RF | → GO TO G58 |

↓

G57PER. The amount entered is: [G57] per __
- SELECT the unit of time below

| 3. Week | 4. Two weeks | 5. Month | 6. Year |
| 7. Other-specify | → G57PERSPEC. Specify. (String 100) |

G58. During which months of [PYEAR] did [you / she] get this income?
- ENTER all that apply

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December	13. All

Wife/"Wife"-Rent, Dividends, Interest, Trust Funds, or Royalties

G59. Did [you / she] receive any (other) income in [PYEAR] from rent, dividends or interest (besides the amounts you reported earlier), trust funds or royalties?
- ENTER all that apply
- PROBE: Any others?

1. Yes, rent	ASK G59A–G59A4
2. Yes, dividends	ASK G59B–G59B4
3. Yes, interest	ASK G59C–G59C4
4. Yes, trust funds or royalties	ASK G59D–G59D4
5. No	→ GO TO G60

G59=Rent

G59A. How much was the rent?
- ENTER amount here, then ENTER unit of time on next screen (Month, Year)

$ 1 – 999,997	DK/RF	→ GO TO G59AA RULE

↓

G59APER. The amount entered is: [G59A] per __
- SELECT the unit of time below

5. Month	6. Year	7. Other-specify	→ G59APERSPEC. Specify. (String 100)

G59A3 RULE. WHETHER HEAD REPORTED RENT (G25A=YES)

HEAD REPORTED RENT	5. ALL OTHERS	→ GO TO G59A4
↓		

G59A3. Is that in addition to the amount you reported for [HEAD / yourself]?

1. Yes	5. No

G59A4. During which months of [PYEAR] did [you / she] get this income?
- ENTER all that apply

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December	13. All

G59=Dividends

G59B. How much were the dividends?
- ENTER amount here, then ENTER unit of time on next screen (Month, Year)

$ 1 – 999,997	DK/RF	→ GO TO G59BB RULE

↓

G59BPER. The amount entered is: [G59B] per __
- SELECT the unit of time below

5. Month	6. Year	7. Other-specify	→ G59BPERSPEC. Specify. (String 100)

G59B3 RULE. WHETHER HEAD REPORTED DIVIDENDS (G25B=YES)

| HEAD REPORTED DIVIDENDS | 5. ALL OTHERS | → GO TO G59B4 |
| ↓ | | |

G59B3. Is that in addition to the amount you reported for [HEAD / yourself]?

1. Yes   5. No

G59B4. During which months of [PYEAR] did [you / she] get this income?
- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

G59=Interest

G59C. How much was the interest?
- ENTER amount here, then ENTER unit of time on next screen (Month, Year)

$ 1 – 999,997   DK/RF   → GO TO G59CC RULE

↓

G59CPER. The amount entered is: [G59C] per __
- SELECT the unit of time below

5. Month   6. Year   7. Other-specify   → G59CPERSPEC. Specify. (String 100)

G59C3 RULE. WHETHER HEAD REPORTED INTEREST (G25C=YES)

| HEAD REPORTED INTEREST | 5. ALL OTHERS | → GO TO G59C4 |
| ↓ | | |

G59C3. Is that in addition to the amount you reported for [HEAD / yourself]?

1. Yes   5. No

G59C4. During which months of [PYEAR] did [you / she] get this income?
- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

G59=Trust Funds or Royalties

G59D. How much did [you / she] receive from trust funds or royalties?
- ENTER amount here, then ENTER unit of time on next screen (Month, Year)

$ 1 – 999,997   DK/RF   → GO TO G59D4

↓

G59DPER. The amount entered is: [G59D] per __
- SELECT the unit of time below

5. Month   6. Year   7. Other-specify   → G59DPERSPEC. Specify. (String 100)

G59D4. During which months of [PYEAR] did [you / she] get this income?
- ENTER all that apply

1. January	2. February	3. March	4. April	5. May	6. June	
7. July	8. August	9. September	10. October	11. November	12. December	13. All

Wife/"Wife"-SSI, TANF, Child Support or Other Welfare

G60. Did [you / she] receive any (other) income in [PYEAR] from Supplemental Security Income, TANF (Temporary Assistance for Needy Families)[*PYSTATERESIDE≠FC/DK/RF*: or [STATEPROG2]] formerly called ADC or AFDC, child support or other welfare?
- ENTER all that apply
- PROBE: Any others?
- SSI (Supplemental Security Income) is **not** Social Security, although the Social Security Administration administers the program and a person can receive both. See F1-Help for more information.

1. Yes, SSI	ASK G60A1–G60A5
2. Yes, TANF [STATEPROG3] /ADC/AFDC	ASK G60B–G60BBB
3. Yes, child support	ASK G60C–G60CC
4. Yes, other welfare	ASK G60D–G60DD
5. No	→ GO TO G61

G60=SSI

G60A1. Did [you / she] receive the SSI for [yourself / herself], or for someone else?

1. Self	→ GO TO G60A4		2. Someone else	3. Both	DK/RF	→ GO TO G60A4

↓

G60A2. Let's talk about the other person's Supplemental Security when we talk about their income.
- ENTER [1] to continue

1. Continue

G60A3 RULE. WHETHER SSI FOR SOMEONE ELSE (G60A1=2) OR BOTH (G60A1=3)

SOMEONE ELSE	→ GO TO NEXT G60 ITEM;	BOTH
	THEN GO TOG61	↓

G60A4. How much did [you / she] receive from Supplemental Security Income for [yourself / herself] in [PYEAR]?
- ENTER amount here, then ENTER unit of time on next screen (Month, Year)

$ 1 – 999,997	DK/RF	→ GO TO G60A5

↓

G60APER. The amount entered is: [G60A4] per __
- SELECT the unit of time below

5. Month	6. Year	7. Other-specify	→ G60APERSPEC. Specify. (String 100)

G60A5. During which months of [PYEAR] did [you / she] get this income?
- ENTER all that apply

1. January	2. February	3. March	4. April	5. May	6. June	
7. July	8. August	9. September	10. October	11. November	12. December	13. All

G60=TANF

G60B. How much did [you / she] receive from TANF (Temporary Assistance for Needy Families) [*PYSTATERESIDE≠FC/DK/RF*: or [STATEPROG]] in [PYEAR]?
- ENTER amount here, then ENTER unit of time on next screen (Month, Year)

| $ 1 – 999,997 | DK/RF | → GO TO G60BB |

↓

G60BPER. The amount entered is: [G60B] per __
- SELECT the unit of time below

| 5. Month | 6. Year | 7. Other-specify | → G60BPERSPEC. Specify. (String 100)

G60BB. During which months of [PYEAR] did [you / she] get this income?
- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

G60BBB. Who in the family was covered by this?
- ENTER all that apply
- PROBE: Any others?

| 1 – 24. [CYNAMF CYNAML, CYAQRTH, CYFUHU] | *(CYAQSN list of PYEAR FU Members*: *CYFUHU=FU, FUMI≤PYR, MO≥PYR, DECD≥PYR, MILT, EDUC, HLTH, OTHR)*

G60=Child Support

G60C. How much did [you / she] receive from child support in [PYEAR]?
- ENTER amount here, then ENTER unit of time on next screen (Month, Year)

| $ 1 – 999,997 | DK/RF | → GO TO G60CC |

↓

G60CPER. The amount entered is: [G60C] per __
- SELECT the unit of time below

| 5. Month | 6. Year | 7. Other-specify | → G60CPERSPEC. Specify. (String 100)

G60CC. During which months of [PYEAR] did [you / she] get this income?
- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

G60=Other Welfare

G60D. How much did [you / she] receive from other welfare in [PYEAR]?
- ENTER amount here, then ENTER unit of time on next screen (Month, Year)

| $ 1 – 999,997 | DK/RF | → GO TO G60DD |

↓

G60DPER. The amount entered is: [G60D] per __
- SELECT the unit of time below

| 5. Month | 6. Year | 7. Other-specify | → G60DPERSPEC. Specify. (String 100)

G60DD. During which months of [PYEAR] did [you / she] get this income?
- ENTER all that apply

1. January	2. February	3. March	4. April	5. May	6. June	
7. July	8. August	9. September	10. October	11. November	12. December	13. All

Wife/"Wife"-Pensions or Annuities
G61. Did [you / she] receive any (other) income in [PYEAR] from pensions or annuities?

| 1. Yes | 5. No | → GO TO G62

↓

G61A. How much was from pensions or annuities?
- ENTER amount here, then ENTER unit of time on next screen (Month, Year)

$ 1 – 999,997 | DK/RF | → GO TO G61B

↓

G61PER. The amount entered is: [G61A] per __
- SELECT the unit of time below

5. Month | 6. Year | 7. Other-specify | → G61PERSPEC. Specify. (String 100)

G61B. During which months of [PYEAR] did [you / she] get this income?
- ENTER all that apply

1. January	2. February	3. March	4. April	5. May	6. June	
7. July	8. August	9. September	10. October	11. November	12. December	13. All

Wife/"Wife"-Help From Relatives or Friends
G62. Did [you / she] receive any help in [PYEAR] from relatives or friends?
- This must be from a non-FU member
- ENTER all that apply
- PROBE: Any others?

| 1. Yes, relatives | ASK G62A–G62AA

| 2. Yes, friends | ASK G62B–G62BB

| 5. No | → GO TO G63

G62=Relatives
G62A. How much was from relatives?
- ENTER amount here, then ENTER unit of time on next screen (Month, Year)

$ 1 – 999,997 | DK/RF | → GO TO G62AA

↓

G62APER. The amount entered is: [G62A] per __
- SELECT the unit of time below

5. Month | 6. Year | 7. Other-specify | → G62APERSPEC. Specify. (String 100)

G62AA. During which months of [PYEAR] did [you / she] get this income?
- ENTER all that apply

1. January	2. February	3. March	4. April	5. May	6. June	
7. July	8. August	9. September	10. October	11. November	12. December	13. All

G62=Friends

G62B. How much was from friends?
- ENTER amount here, then ENTER unit of time on next screen (Month, Year)

| \$ 1 – 999,997 | DK/RF | → GO TO G62BB

↓

G62BPER. The amount entered is: [G62B] per __
- SELECT the unit of time below

| 5. Month | 6. Year | 7. Other-specify | → G62BPERSPEC. Specify. (String 100)

G62BB. During which months of [PYEAR] did [you / she] get this income?
- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

Wife/"Wife"-Other Income

G63. Any other income?

| 1. Yes | 5. No | → GO TO G73 RULE

↓

G63A. What was it from?
- IF R mentions income from a job, PROBE for these details:
- Occ/Ind: What was [your / her] occupation? What sort of work did [you / she] do?
- Start/End: What month and year did [you / she] start that job? End that job?
- Job Title / Commute: What was [your / her] official job title? On a typical day, how many minutes was [your / her] round trip commute to and from work?
- Work Hours: How many weeks did [you / she] work at that job in [PYEAR]? On average, how many hours per week did [you / she] work in [PYEAR]?

| Open end |

G63B. How much did that amount to in [PYEAR]?
- ENTER amount here, then ENTER unit of time on next screen (Month, Year)

| \$ 1 – 999,997 | DK/RF | → GO TO G63C

↓

G63BPER. The amount entered is: [G63B] per __
- SELECT the unit of time below

| 5. Month | 6. Year | 7. Other-specify | → G63BPERSPEC. Specify. (String 100)

G63C. During which months of [PYEAR] did [you / she] get this income?
- ENTER all that apply

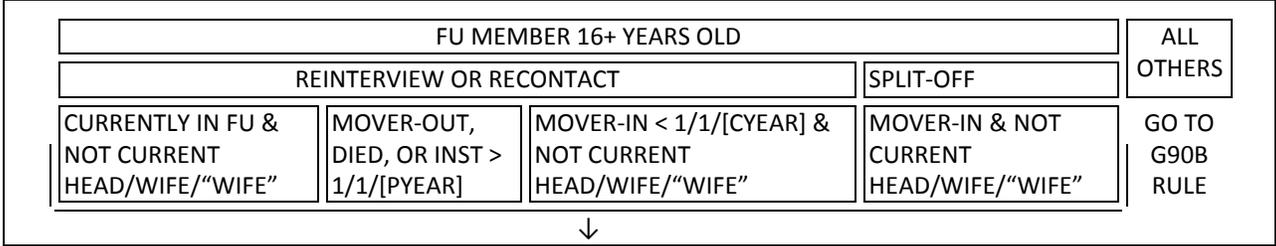| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

Big OFUM Series

G73 RULE. WHETHER THERE ARE ELIGIBLE PYEAR OFUMs 16 YEARS OLD OR OLDER
((AGEIWDATE≥16 & IWTYPE=REINT, RECON & CYFUHU=1 & CYAQRTH>222) OR
(AGEIWDATE≥16 & IWTYPE=REINT, RECON & CYFUHU=6–12 & CYYMIO=PYEAR–CYEAR) OR
(AGEIWDATE≥16 & IWTYPE=REINT, RECON & CYFUHU=4 & CYYMIO≤PYEAR & CYAQRTH>222) OR (AGEIWDATE≥16 & IWTYPE=S/O & CYFUHU=4 & CYAQRTH>222))

FU MEMBER 16+ YEARS OLD				ALL OTHERS
REINTERVIEW OR RECONTACT			SPLIT-OFF	
CURRENTLY IN FU & NOT CURRENT HEAD/WIFE/"WIFE"	MOVER-OUT, DIED, OR INST > 1/1/[PYEAR]	MOVER-IN < 1/1/[CYEAR] & NOT CURRENT HEAD/WIFE/"WIFE"	MOVER-IN & NOT CURRENT HEAD/WIFE/"WIFE"	GO TO G90B RULE
		↓		

G73. AQSN OF FU MEMBER

G74 RULE. WHETHER FU MEMBER IS DECEASED (CYFUHU=7)

FU MEMBER IS DECEASED	→ GO TO G76	ALL OTHERS
		↓

Big Ofum-Work Income

G75. Next we would like to know a little about [CYNAMF CYNAML]. [Are / Is] [you / he / she] working now, looking for work, retired, a student, keeping house, or what?
- ENTER all that apply
- PROBE: Any others?

1. Working now	2. Only temporarily laid off	3. Looking for work, unemployed
4. Retired	5. Disabled, permanently or temporarily	6. Keeping house
7. Student	8. Other-specify → G75SPEC. Specify (String 100)	

G76. [*FU MEMBER IS DECEASED*: Next, we would like to know a little about [CYNAMF CYNAML].] During [PYEAR], how many full-time or part-time jobs did [you / he / she] have (not counting work around the house)?

1. Only one job	2. Two jobs	3. Three jobs	4. Four jobs	5. Didn't have a job
	↓			GO TO G83

G77. [First / Second / Third / Fourth] Job
What kind of work did [you / he / she] ([CYNAMF CYNAML, CYAQRTH, AGEIWDATE]) usually do? What was [your / his / her] occupation?

String 500

G77A. [First / Second / Third / Fourth] Job
What was the official title of [your / his / her] ([CYNAMF CYNAML, CYAQRTH, AGEIWDATE]) job? (The title that [your / his / her] employer used.)

String 200

G77B. [First / Second / Third / Fourth] Job
On a typical day, how many minutes was [your / his / her] ([CYNAMF CYNAML, CYAQRTH, AGEIWDATE]) round trip commute to and from work?
- If R says "it varies", ENTER [996]
- If R says "doesn't commute" (e.g. self-employed, works from home), ENTER [997]

| 1 – 900 | 996. It varies (VOL) | 997. No commute (VOL) |

G78. [First / Second / Third / Fourth] Job
About how much money did [you / he / she] ([CYNAMF CYNAML, CYAQRTH, AGEIWDATE]) earn from that job last year?
- ENTER amount here, then ENTER unit of time on next screen (Hour, Week, Two weeks, Month, Year)

| $ 1 – 9,999,997.99 | DK/RF | → GO TO G79

↓

G78PER. The amount entered is: [G78] per __
- SELECT the unit of time below

| 1. Hour | 3. Week | 4. Two weeks | 5. Month | 6. Year |

| 7. Other-specify | → G78PERSPEC. Specify. (String 100)

G79. [First / Second / Third / Fourth] Job
About how many weeks did [you / he / she] ([CYNAMF CYNAML, CYAQRTH, AGEIWDATE]) work on that job last year?

| 1 – 52 |

G80. [First / Second / Third / Fourth] Job
During which months was that?
- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

G81. [First / Second / Third / Fourth] Job
During the weeks that [you / he / she] ([CYNAMF CYNAML, CYAQRTH, AGEIWDATE]) worked, about how many hours did [you / he / she] usually work per week?

| 1 – 112 |

G82 RULE. NUMBER OF JOBS AT G76

| MORE JOBS | → REPEAT G77–G81; MAX=4; | ALL OTHERS |
| | THEN GO TO G83 | ↓ |

Big Ofum-Transfer Income
G83. Did [you / he / she] ([CYNAMF CYNAML, CYAQRTH, AGEIWDATE]) have any [other] income, such as pensions, welfare, interest, gifts, or anything else, last year?

| 1. Yes | 5. No | → GO TO G87 RULE

↓

G84. What was that from?
- ENTER all that apply
- PROBE: Any others?

1. Interest	ASK G84A–G84AA
2. TANF [STATEPROG3]/ADC/AFDC	ASK G84B–G84BBB
3. SSI	ASK G84C1–G84C5
4. Welfare	ASK G84D–G84DD
5. Social Security	ASK G84E–G84E4
6. Veterans benefits	ASK G84F–G84FF
7. Pensions, annuities	ASK G84G–G84GG
8. Unemployment compensation	ASK G84H–G84HH
9. Worker's compensation	ASK G84J–G84JJ
10. Child support	ASK G84K–G84KK
11. Help from relatives	ASK G84L–G84LL
12. Other-specify	ASK G84M–G84M3

G84=Interest
G84A.   How much was from interest?
- ENTER amount here, then ENTER unit of time on next screen (Month, Year)

$ 1 – 999,997	DK/RF	→ GO TO G84AA

↓

G84APER. The amount entered is: [G84A] per __
- SELECT the unit of time below

5. Month	6. Year	7. Other-specify	→ G84APERSPEC. Specify. (String 100)

G84AA. During which months of [PYEAR] did [you / he / she] ([CYNAMF CYNAML, CYAQRTH, AGEIWDATE]) get this income?
- ENTER all that apply

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December	13. All

G84=TANF
G84B. How much was from TANF (Temporary Assistance for Needy Families)[*PYSTATERESIDE≠FC/DK/RF*: or [STATEPROG2]] formerly called ADC or AFDC?
- ENTER amount here, then ENTER unit of time on next screen (Two weeks, Month, Year)

$ 1 – 999,997	DK/RF	→ GO TO G84BB

↓

G84BPER. The amount entered is: [G84B] per __
- SELECT the unit of time below

4. Two weeks	5. Month	6. Year

7. Other-specify	→ G84BPERSPEC. Specify. (String 100)

G84BB. During which months of [PYEAR] did [you / he / she] ([CYNAMF CYNAML, CYAQRTH, AGEIWDATE]) get this income?
- ENTER all that apply

1. January	2. February	3. March	4. April	5. May	6. June	
7. July	8. August	9. September	10. October	11. November	12. December	13. All

G84BBB. Who in the family was covered by this?
- ENTER all that apply
- PROBE: Any others?

1 – 24. [CYNAMF CYNAML, CYAQRTH, CYFUHU]   *(CYAQSN list of PYEAR FU Members*: *CYFUHU=FU, FUMI≤PYR, MO≥PYR, DECD≥PYR, MILT, EDUC, HLTH, OTHR)*

G84=SSI

G84C1. Did [you / he / she] ([CYNAMF CYNAML, CYAQRTH, AGEIWDATE]) receive the SSI for [yourself / himself / herself], or for someone else?
- SSI (Supplemental Security Income) is **not** Social Security, although the Social Security Administration administers the program and a person can receive both. See F1-Help for more information.

1. Self → GO TO G84C4   2. Someone else   3. Both   DK/RF → GO TO G84C4
↓

G84C2. Let's talk about the other person's Supplemental Security when we talk about their income.
- ENTER [1] to continue

1. Continue

G84C3 RULE. WHETHER SSI FOR SOMEONE ELSE (G84C1=2) OR BOTH (G84C1=3)

SOMEONE ELSE → GO TO NEXT G84 ITEM;   BOTH
THEN GO TO G87 RULE   ↓

G84C4. How much was [*G84C1=SELF*: it / *ALL OTHERS*: the Supplemental Security Income [you / he / she] received for [yourself / himself / herself]]?
- ENTER amount here, then ENTER unit of time on next screen (Month, Year)

$ 1 – 999,997   DK/RF → GO TO G84C5
↓

G84C4PER. The amount entered is: [G84C4] per __
- SELECT the unit of time below

5. Month 6. Year   7. Other-specify   → G84C4PERSPEC. Specify. (String 100)

G84C5. During which months of [PYEAR] did [you / he / she] ([CYNAMF CYNAML, CYAQRTH, AGEIWDATE]) get this income?
- ENTER all that apply

1. January	2. February	3. March	4. April	5. May	6. June	
7. July	8. August	9. September	10. October	11. November	12. December	13. All

G84=Welfare

G84D. How much was from welfare?
- ENTER amount here, then ENTER unit of time on next screen (Week, Two weeks, Month, Year)

| $ 1 – 999,997 | DK/RF | → GO TO G84DD

↓

G84DPER. The amount entered is: [G84D] per __
- SELECT the unit of time below

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

| 7. Other-specify | → G84DPERSPEC. Specify. (String 100)

G84DD. During which months of [PYEAR] did [you / he / she] ([CYNAMF CYNAML, CYAQRTH, AGEIWDATE]) get this income?
- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

G84=Social Security

G84E RULE. WHETHER SOC SEC ALREADY REPORTED FOR THIS OFUM AT G32

| SOC SEC REPORTED | → GO TO NEXT G84 ITEM; | SOC SEC NOT REPORTED |
| | THEN GO TO G87 RULE | ↓ |

G84E2A.

What was the Social Security? Was that disability, retirement, survivor's benefits or what?
- ENTER all that apply
- PROBE: Any others?

| 1. Disability | 2. Retirement | 3. Survivor's benefits | 5. Dependent of disabled recipient |
| 6. Dependent of retired | 7. Other-specify | → G84E2ASPEC. Specify. (String 100) |

G84E3. How much was the total amount from Social Security? [*2+ SOCSEC INCOMES*: Please include all amounts from all types of Social Security [you / he / she] received in [PYEAR].]
- ENTER amount here, then ENTER unit of time on next screen (Month, Year)

| $ 1 – 999,997 | DK/RF | → GO TO G84E4

↓

G84E3PER. The amount entered is: [G84E3] per __
- SELECT the unit of time below

| 5. Month | 6. Year | 7. Other-specify | → G84E3PERSPEC. Specify. (String 100)

G84E4. During which months of [PYEAR] did [you / he / she] ([CYNAMF CYNAML, CYAQRTH, AGEIWDATE]) get this income? [*2+ SOCSEC INCOMES*: (This includes all types of Social Security [you / he / she] received in [PYEAR].)]
- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

G84=Veterans benefits

G84F. How much was from veterans benefits?
- ENTER amount here, then ENTER unit of time on next screen (Month, Year)

| $ 1 – 999,997 | DK/RF | → GO TO G84FF

↓

G84FPER. The amount entered is: [G84F] per __
- SELECT the unit of time below

| 5. Month | 6. Year | 7. Other-specify | → G84FPERSPEC. Specify. (String 100)

G84FF. During which months of [PYEAR] did [you / he / she] ([CYNAMF CYNAML, CYAQRTH, AGEIWDATE]) get this income?
- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

G84=Pensions, annuities

G84G. How much was from pensions or annuities?
- ENTER amount here, then ENTER unit of time on next screen (Month, Year)

| $ 1 – 999,997 | DK/RF | → GO TO G84GG

↓

G84GPER. The amount entered is: [G84G] per __
- SELECT the unit of time below

| 5. Month | 6. Year | 7. Other-specify | → G84GPERSPEC. Specify. (String 100)

G84GG. During which months of [PYEAR] did [you / he / she] ([CYNAMF CYNAML, CYAQRTH, AGEIWDATE]) get this income?
- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

G84=Unemployment comp

G84H. How much was from unemployment compensation?
- ENTER amount here, then ENTER unit of time on next screen (Week, Two weeks, Month, Year)

| $ 1 – 999,997 | DK/RF | → GO TO G84HH

↓

G84HPER. The amount entered is: [G84H] per __
- SELECT the unit of time below

| 3. Week | 4. Two weeks | 5. Month | 6. Year |
| 7. Other-specify | → G84HPERSPEC. Specify. (String 100)

G84HH. During which months of [PYEAR] did [you / he / she] ([CYNAMF CYNAML, CYAQRTH, AGEIWDATE]) get this income?
- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

G84=Worker's comp

G84J. How much was from worker's compensation?
- ENTER amount here, then ENTER unit of time on next screen (Month, Year)

| \$ 1 – 999,997 | DK/RF | → GO TO G84JJ

↓

G84JPER. The amount entered is: [G84J] per __
- SELECT the unit of time below

| 5. Month | 6. Year | 7. Other-specify | → G84JPERSPEC. Specify. (String 100)

G84JJ. During which months of [PYEAR] did [you / he / she] ([CYNAMF CYNAML, CYAQRTH, AGEIWDATE]) get this income?
- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

G84=Child support

G84K. How much was from child support?
- ENTER amount here, then ENTER unit of time on next screen (Week, Two weeks, Month, Year)

| \$ 1 – 999,997 | DK/RF | → GO TO G84KK

↓

G84KPER. The amount entered is: [G84K] per __
- SELECT the unit of time below

| 3. Week | 4. Two weeks | 5. Month | 6. Year |
| 7. Other-specify | → G84KPERSPEC. Specify. (String 100)

G84KK. During which months of [PYEAR] did [you / he / she] ([CYNAMF CYNAML, CYAQRTH, AGEIWDATE]) get this income?
- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

G84=Help from relatives

G84L. How much was received from relatives?
- This must be from non-FU members
- ENTER amount here, then ENTER unit of time on next screen (Week, Two weeks, Month, Year)

| \$ 1 – 999,997 | DK/RF | → GO TO G84LL

↓

G84LPER. The amount entered is: [G84L] per __
- SELECT the unit of time below

| 3. Week | 4. Two weeks | 5. Month | 6. Year |
| 7. Other-specify | → G84LPERSPEC. Specify. (String 100)

G84LL. During which months of [PYEAR] did [you / he / she] ([CYNAMF CYNAML, CYAQRTH, AGEIWDATE]) get this income?
- ENTER all that apply

1. January	2. February	3. March	4. April	5. May	6. June	
7. July	8. August	9. September	10. October	11. November	12. December	13. All

G84=Other

G84M. What was that other income from?
- IF R mentions income from a job, PROBE for these details:
- Occ/Ind: What was [your / his / her] occupation? What sort of work did [you / he / she] do?
- Start/End: What month and year did [you / he / she] start that job? End that job?
- Job Title / Commute: What was [your / his / her] official job title? On a typical day, how many minutes was [your / his / her] round trip commute to and from work?
- Work Hours: How many weeks did [you / he / she] work at that job in [PYEAR]? On average, how many hours per week did [you / he / she] work in [PYEAR]?

Open end

G84MM. How much was from anything else?
- ENTER amount here, then ENTER unit of time on next screen (Week, Two weeks, Month, Year)

$ 1 – 999,997 | DK/RF → GO TO G84M3
↓

G84MMPER. The amount entered is: [G84MM] per __
- SELECT the unit of time below

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

7. Other-specify → G84MMPERSPEC. Specify. (String 100)

G84M3. During which months of [PYEAR] did [you / he / she] ([CYNAMF CYNAML, CYAQRTH, AGEIWDATE]) get this income?
- ENTER all that apply

1. January	2. February	3. March	4. April	5. May	6. June	
7. July	8. August	9. September	10. October	11. November	12. December	13. All

G87 RULE. WHETHER THIS OFUM IS UNDER 50 YEARS OLD (AGEIWDATE < 50)

OFUM IS < 50 YEARS OLD | ALL OTHERS → GO TO G90
↓

G88MO. When did [you / he / she] ([CYNAMF CYNAML, CYAQRTH, AGEIWDATE]) last attend school?
- SELECT Month and [Enter] to go to next screen for year

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December
21. Winter	22. Spring	23. Summer	24. Fall		

G88YR. The month entered is: [G88MO]
- ENTER the year below
- 9996 [P2YEAR] – [CYEAR], DK which year
- 9997 Before [P2YEAR], DK exact year

1901 – [P3YEAR]	[P2YEAR] – [CYEAR]	9996. [P2YEAR] – [CYEAR], DK Which Year	9997. Before [P2YEAR], DK Exact Year

G90. What is the highest grade or year of school that [you / he / she] [have / has] ([CYNAMF CYNAML, CYAQRTH, AGEIWDATE]) completed?

0. None	1. First grade	2. Second grade	3. Third grade	4. Fourth grade
5. Fifth grade	6. Sixth grade	7. Seventh grade	8. Eighth grade	9. Ninth grade
10. Tenth grade	11. Eleventh grade	12. Twelfth grade, "High School", GED	13. One year college
14. Two years college	15. Three years college	16. Graduated, Bachelor's degree	
17. At least one year postgraduate, or more			

G90A RULE. WHETHER THERE ARE MORE ELIGIBLE OLDER OFUMS

MORE ELIGIBLE OFUMs	→ REPEAT G75–G90; MAX=24; THEN GO TO G90B RULE	ALL OTHERS ↓

Little OFUM Series

G90B RULE. WHETHER ANY ELIGIBLE PYEAR FU MEMBERS YOUNGER THAN 16 YEARS OLD ((AGEIWDATE<16 & IWTYPE=REINT, RECON & CYFUHU=1 & CYAQRTH>222) OR (AGEIWDATE<16 & IWTYPE=REINT, RECON & CYFUHU=6–12 & CYYMIO=PYEAR–[CYEAR]) OR (AGEIWDATE<16 & IWTYPE=REINT, RECON & CYFUHU=4 & CYYMIO≤PYEAR & CYAQRTH>222) OR (AGEIWDATE<16 & IWTYPE=S/O & CYFUHU=4 & CYAQRTH>222))

FU MEMBER 15 YEARS OR YOUNGER				ALL OTHERS
REINTERVIEW OR RECONTACT			SPLIT-OFF	
CURRENTLY IN FU	MOVER-OUT, DIED, OR INST > 1/1/[PYEAR]	MOVER-IN < 1/1/[CYEAR]	MOVER-IN	GO TO G99
↓				

Little Ofum-Income

G90D. [*FIRST ITERATION*: Now the younger member(s) of [*R=FU MEMBER*: your / *R=PROXY*: the] family.]
- [CYAQRTH]

Did [CYNAMF CYNAML] have any income in [PYEAR]?

1. Yes	5. No	→ GO TO G98 RULE

↓

G92. Now, we would like to ask about [CYNAMF CYNAML's] income. What was that from?
- ENTER all that apply
- PROBE: Any others?

1. Work	ASK G94A–G94AA, G95–G97
2. Interest	ASK G94B–G94BB
3. SSI	ASK G94C–G94CC
4. Welfare	ASK G94D–G94DD

| 5. Social Security | ASK G94E–G94E4 |

| 6. Other-specify | ASK G94F–G94F3 |

G92=Work

G94A. How much was from work?
- ENTER amount here, then ENTER unit of time on next screen (Hour, Week, Two weeks, Month, Year)

| $ 1.0 – 9,999,997.99 | DK/RF | → GO TO G94AA

↓

G94APER. The amount entered is: [G94A] per __
- SELECT the unit of time below

| 1. Hour | 3. Week | 4. Two weeks | 5. Month | 6. Year |

| 7. Other-specify | → G94APERSPEC. Specify. (String 100)

G94AA. During which months of [PYEAR] did [he / she] ([CYNAMF CYNAML, CYAQRTH, AGEIWDATE]) get this income?
- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

G95. What was [his / her] ([CYNAMF CYNAML, CYAQRTH, AGEIWDATE]) occupation? What kind of work did [he / she] do?

| String 500 |

G96. About how many weeks did [he / she] ([CYNAMF CYNAML, CYAQRTH, AGEIWDATE]) work on that job last year?

| 1 – 52 |

G97. During the weeks that [he / she] ([CYNAMF CYNAML, CYAQRTH, AGEIWDATE]) worked, about how many hours did [he / she] usually work per week?

| 1 – 112 |

G92=Interest

G94B. How much was from interest?
- ENTER amount here, then ENTER unit of time on next screen (Month, Year)

| $ 1 – 999,997 | DK/RF | → GO TO G94BB

↓

G94BPER. The amount entered is: [G94B] per __
- SELECT the unit of time below

| 5. Month | 6. Year | 7. Other-specify | → G94BPERSPEC. Specify. (String 100)

G94BB. During which months of [PYEAR] did [he / she] ([CYNAMF CYNAML, CYAQRTH, AGEIWDATE]) get this income?
- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

G92=SSI

G94C. How much was from SSI?
- ENTER amount here, then ENTER unit of time on next screen (Month, Year)
- SSI (Supplemental Security Income) is **not** Social Security, although the Social Security Administration administers the program and a person can receive both. See F1-Help for more information.

| $ 1 – 999,997 | DK/RF | → GO TO G94CC |

↓

G94CPER. The amount entered is: [G94C] per __
- SELECT the unit of time below

| 5. Month | 6. Year | 7. Other-specify | → G94CPERSPEC. Specify. (String 100) |

G94CC. During which months of [PYEAR] did [he / she] ([CYNAMF CYNAML, CYAQRTH, AGEIWDATE]) get this income?
- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

G92=Welfare

G94D. How much was from welfare?
- ENTER amount here, then ENTER unit of time on next screen (Week, Two weeks, Month, Year)

| $ 1 – 999,997 | DK/RF | → GO TO G94DD |

↓

G94DPER. The amount entered is: [G94D] per __
- SELECT the unit of time below

| 3. Week | 4. Two weeks | 5. Month | 6. Year |
| 7. Other-specify | → G94DPERSPEC. Specify. (String 100) |

G94DD. During which months of [PYEAR] did [he / she] ([CYNAMF CYNAML, CYAQRTH, AGEIWDATE]) get this income?
- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

G92=Social Security

G94E RULE. WHETHER SOC SEC ALREADY REPORTED FOR THIS OFUM AT G32

| SOC SEC REPORTED → GO TO NEXT G94 ITEM; THEN GO TO G98 RULE | SOC SEC NOT REPORTED ↓ |

G94E2A. What was the Social Security? Was that survivor's benefits, dependent assistance, or what?
- ENTER all that apply
- PROBE: Any others?

| 3. Survivors benefits | 5. Dependent of disabled recipient | 6. Dependent of retired recipient |
| 7. Other-specify | → G94E2ASPEC. Specify. (String 100) |

G94E3. How much was the total amount from Social Security? [*2+ SOCSEC INCOMES*: Please include all amounts from all types of Social Security [you / he / she] received in [PYEAR].]
- ENTER amount here, then ENTER unit of time on next screen (Month, Year)

| \$ 1 – 999,997 | | DK/RF | → GO TO G94E4 |

↓

G94E3PER. The amount entered is: [G94E3] per __
- SELECT the unit of time below

| 5. Month | 6. Year | 7. Other-specify | → G94E3PERSPEC. Specify. (String 100) |

G94E4. During which months of [PYEAR] did [you / he / she] ([CYNAMF CYNAML, CYAQRTH, AGEIWDATE]) get this income? [*2+ SOCSEC INCOMES*: (This includes all types of Social Security [you / he / she] received in [PYEAR].)]
- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June | |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

G92=Other

G94F. What was that other income from?
- DO NOT include gifts, allowances, or other money from other FU members
- IF R mentions income from a job, PROBE for these details:
- Occ/Ind: What was [his / her] occupation? What sort of work did [he / she] do?
- Start/End: What month and year did he / she] start that job? End that job?
- Work Hours: How many weeks did [he / she] work at that job in [PYEAR]? On average, how many hours per week did [he / she] work in [PYEAR]?

| Open end |

G94F2. How much was it?
- ENTER amount here, then ENTER unit of time on next screen (Week, Two weeks, Month, Year)

| \$ 1 – 999,997 | | DK/RF | → GO TO G94F3 |

↓

G94F2PER. The amount entered is: [G94F2] per __
- SELECT the unit of time below

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

| 7. Other-specify | → G94F2PERSPEC. Specify. (String 100) |

G94F3. During which months of [PYEAR] did [he / she] ([CYNAMF CYNAML, CYAQRTH, AGEIWDATE]) get this income?
- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June | |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

G98 RULE. WHETHER THERE ARE MORE ELIGIBLE YOUNGER OFUMS AT G90C

| MORE ELIGIBLE OFUMs | → REPEAT G92–G94F3; MAX=24; | ALL OTHERS |
| | THEN GO TO G99 | ↓ |

G99. Did [you / HEAD] [*PYEAR FU COUNT>1*: or anyone else in [your / his / her] family living there] get any other money in [PYEAR] – like a big settlement from an insurance company, or an inheritance?

    1. Yes   5. No   → GO TO G102

      ↓

    G100. How much did that amount to?

      $ 1 – 9,999,997

    G101. How much of that was an inheritance?

      $ 0 – 9,999,997

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

    1. Yes   5. No or did / will not file   → GO TO G103

      ↓

    G102A. How much was [your / his / her] itemized deduction for charitable contributions?

      $ 0 – 999,997

    G102B. How much was [your / his / her] itemized deduction for medical expenses?
- IF necessary: Is that the amount of the deduction or is that the total medical expenses? What was the amount of the deduction?

      $ 0 – 999,997

G103. In [PYEAR], did [you / HEAD] [*PYEAR FU COUNT>1*: or anyone else in [your / his / her] family living there] give any money toward the support of anyone who was not living there at the time, including child support, alimony, money given to parents, and things like that? Don't include loans or charitable contributions to organizations; we'll ask about them later.

    1. Yes   5. No   → GO TO SECTION R

      ↓

    G104. How many people was that?

      1 – 9

    G105. Who was the [first / next] person? What is [FIRSTNAME's] relationship to [you / HEAD]?

        FIRSTNAME. String 10

        LASTNAME. String 15

    G105RTHLAB. What is [G105FIRSTNAME G105LASTNAME's] relationship to [you / HEAD]?

      String 50; RTH Lookup

    G106 RULE. WHETHER MORE PERSONS SUPPORTED AT G104

MORE PERSONS SUPPORTED → REPEAT G105; MAX=9; THEN GO TO G106	ALL OTHERS ↓

    G106. How much money was that altogether in [PYEAR]?

      $ 1 – 9,999,997

G107. Was any of that child support?

> | 1. Yes | | 5. No | → GO TO G109
>
> ↓
>
> G108. How much did that child support amount to in [PYEAR]?
>
> > | $ 1 – [G106 (9,999,997)] |

G109. Was any of the money [you / HEAD] gave in [PYEAR] alimony?

> | 1. Yes | | 5. No | → GO TO G111 RULE
>
> ↓
>
> G110. How much did that alimony amount to in [PYEAR]?
>
> > | $ 1 – [G106 (9,999.997)] |

G111 RULE. NUMBER OF PERSONS SUPPORTED AT G104

MORE THAN ONE PERSON SUPPORTED	ONLY ONE PERSON SUPPORTED
↓	↓

G112. Were any of those people dependent on [you / HEAD] for more than half of their total support?	G114. Was that person dependent on [you / HEAD] for more than half of their total support?
	1. Yes		5. No	→ GO TO SECTION R ↓ G113. How many people is that? 	1 – 9			1. Yes		5. No	 —————————— GO TO SECTION R

Section R: Year Before Last Income

RINTRO. Because we interview our families every other year, we often miss important financial information. Now, I will be asking you a few questions about [your / their] income from two years ago, that is [P2YEAR].

R1CKPT. WHETHER HEAD WORKED IN P2YEAR (HEADJOBS.BCWTRP2YEAR)

```
┌─────────────────────────────────────────────────────────────────┐
│   1. HEAD WORKED IN [P2YEAR]   5. ALL OTHERS   → GO TO R7ACKPT     │
│                    ↓                                                │
└─────────────────────────────────────────────────────────────────┘
```

R2. Earlier you reported that [you / HEAD / WIFE/"WIFE"] [were / was] working in [P2YEAR]. Thinking now about all the work for money that [you / he / she] did **during [P2YEAR]**, including jobs, businesses, self-employment and part-time work, about how much did [you / he / she] earn altogether **in [P2YEAR]**? Please include any income from bonuses, overtime, tips or commissions.
- IF necessary: Please give me your best estimate
- ENTER amount here, then ENTER unit of time on next screen (Hour, Week, Two weeks, Month, Year)

    1 – 9,999,997.99   DK/RF   → GO TO R7ACKPT
                    ↓
    R2PER. The amount entered is: [R2] per __
    - SELECT the unit of time below
    1. Hour   3. Week   4. Two weeks   5. Month   6. Year
    7. Other-specify   → R2PERSPEC. Specify. (String 100)

R7ACKPT. CAI CHECKPOINT: WHETHER WIFE/"WIFE" IN FU (CYFUHU=1, 4 & CYAQRTH=202, 222)

```
┌─────────────────────────────────────────────────────────────────┐
│   1. WIFE/"WIFE" IN FU   5. ALL OTHERS   → GO TO R41                │
│                    ↓                                                │
└─────────────────────────────────────────────────────────────────┘
```

R7BCKPT. CAI CHECKPOINT: WHETHER WIFE/"WIFE" WORKED IN P2YEAR (WIFEJOBS.DEWTRP2YEAR)

```
┌─────────────────────────────────────────────────────────────────┐
│   1. WIFE/"WIFE" WORKED IN [P2YEAR]   → ASK R2 FOR WIFE/"WIFE";    │
│                                         THEN GO TO R41             │
│                                              5. ALL OTHERS         │
│                                                    ↓               │
└─────────────────────────────────────────────────────────────────┘
```

R41. At any time during [**P2YEAR**], even for one month, did [*P2YEAR FU COUNT=1*: you / *ALL OTHERS*: anyone in this family] receive any income from TANF (Temporary Assistance for Needy Families) [*PYSTATERESIDE≠FC/DK/RF*: or [STATEPROG2]] formerly called ADC or AFDC?
- DO NOT include Federal Food Stamps or SSI
- DO include ADC, AFDC/TANF, General Assistance Programs, Emergency Assistance, Cuban/Haitian Refugee, or Indian Assistance programs

    1. Yes   5. No

R47. (At any time during [P2YEAR], did [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or anyone else in your family there] / *R=PROXY*: anyone in the family] receive any income…)
    From Supplemental Security Income?

    1. Yes   5. No

R51. (At any time during [P2YEAR], did you [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or anyone else in your family there] / *R=PROXY*: anyone in the family] receive any income…)
From **other** welfare?
| 1. Yes | 5. No |

R20. Did you [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or anyone else in your family there] / *R=PROXY*: anyone in the family] receive any income in [P2YEAR] from Social Security?
- If necessary: Including Retirement, Disability, Survivor's or Dependent benefits
| 1. Yes | 5. No |

R29. (At any time during [P2YEAR], did you [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or anyone else in your family there] / *R=PROXY*: anyone in the family] receive any income…)
From the Veteran's Administration for a servicemen's, (widow's,) or survivor's pension, service disability, or the GI bill?
| 1. Yes | 5. No |

R25. (At any time during [P2YEAR], did you [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or anyone else in your family there] / *R=PROXY*: anyone in the family] receive any income…)
From other retirement pay, pensions, or annuities?
| 1. Yes | 5. No |

R33. (At any time during [P2YEAR], did you [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or anyone else in your family there] / *R=PROXY*: anyone in the family] receive any income…)
From unemployment compensation?
| 1. Yes | 5. No |

R37. (At any time during [P2YEAR], did you [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or anyone else in your family there] / *R=PROXY*: anyone in the family] receive any income…)
From workers compensation?
| 1. Yes | 5. No |

R55. (At any time during [P2YEAR], did you [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or anyone else in your family there] / *R=PROXY*: anyone in the family] receive any income…)
From child support, alimony, or separate maintenance?
| 1. Yes | 5. No |

Section W: Wealth
Return to TOC

W1. The next questions I will be asking are designed to give estimates of the wealth of families in the United States and how this has changed in the last two years. [*R=FU MEMBER*: In these questions when I refer to the family, I mean your family living there with you.]
Do [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or your family living there] / *R=PROXY*: they] have any real estate other than [*R=FU MEMBER*: your / *R=PROXY*: their] main home, such as a second home, land (not including farmland), rental real estate, or money owed to [*R=FU MEMBER*: you / *R=PROXY*: them] on a land contract?

| 1. Yes || 5. No | → GO TO W6

↓

W1A. Does that include a second home?

| 1. Yes || 5. No |

W2. If [*R=FU MEMBER*: you / *R=PROXY*: they] sold all that and paid off any debts on it, how much would [*R=FU MEMBER*: you / *R=PROXY*: they] realize on it?

| $ -99,999,999 – 999,999,997 | → GO TO W6 | DK/RF |

↓

W3. Would it amount to $50,000 or more?

| 1. Yes | | 5. No || DK/RF | → GO TO W6

↓   ↓

W4. $150,000 or more?   W5. $5,000 or more?

| 1. Yes || 5. No || DK/RF | | 1. Yes || 5. No || DK/RF |

GO TO W6   GO TO W6

W6. What about the value of what [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or anyone in your family living there] / *R=PROXY*: they] own on wheels? Including personal vehicles you may have already told me about and any cars, trucks, a motor home, a trailer, or a boat – what are they worth all together, minus anything [*R=FU MEMBER*: you / *R=PROXY*: they] still owe on them?
- DO NOT include vehicles owned by HU or HUCS people

| $ -99,999,999 – 999,999,997 | → GO TO W10 | DK/RF |

↓

W7. Would they amount to $10,000 or more?

| 1. Yes | | 5. No || DK/RF | → GO TO W10

↓   ↓

W8. $25,000 or more?   W9. $2,000 or more?

| 1. Yes || 5. No || DK/RF | | 1. Yes || 5. No || DK/RF |

GO TO W10   GO TO W10

W10. Do [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or anyone in your family living there] / *R=PROXY*: they] currently own part or all of a farm or business?

| 1. Yes | 5. No | → GO TO W15

↓

W11. If [*R=FU MEMBER*: you / *R=PROXY*: they] sold all that and paid off any debts on it, how much would [*R=FU MEMBER*: you / *R=PROXY*: they] realize on it?

| $ -99,999,999 – 999,999,997 | → GO TO W15 | DK/RF |

↓

W12. Would it amount to $50,000 or more?

| 1. Yes | | 5. No | DK/RF | → GO TO W15

↓   ↓

W13. $200,000 or more?   W14. $10,000 or more?

| 1. Yes | 5. No | DK/RF | | 1. Yes | 5. No | DK/RF |

GO TO W15   GO TO W15

W15. (Do [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or anyone in your family living there] / *R=PROXY*: they] have…) Any shares of stock in publicly held corporations, mutual funds, or investment trusts, not including stocks in employer-based pensions or IRA's?

| 1. Yes | 5. No | → GO TO W21

↓

W16. If [*R=FU MEMBER*: you / *R=PROXY*: they] sold all that and paid off anything [you / they] owed on it, how much would [*R=FU MEMBER*: you / *R=PROXY*: they] have?

| $ -99,999,999 – 999,999,997 | → GO TO W20CCKPT | DK/RF |

↓

W17. Would it amount to $25,000 or more?

| 1. Yes | | 5. No | DK/RF | → GO TO W21

↓   ↓

W18. $50,000 or more?   W19. $5,000 or more?

| 1. Yes | 5. No | DK/RF | | 1. Yes | 5. No | DK/RF |

↓   GO TO W21   GO TO W21

W20. $100,000 or more?

| 1. Yes | 5. No | DK/RF |

GO TO W21

W20CCKPT. CAI CHECKPOINT: RATIO OF HEAD & WIFE/"WIFE" DIVIDENDS TO EXPECTED DIVIDENDS

IF AN AMOUNT IS REPORTED AT W16 (VALUE OF STOCKS, ETC), ESTIMATED DIVIDENDS ARE CALCULATED USING W20A – B, AND COMPARED TO DIVIDENDS REPORTED IN SECTION G FOR HEAD AND WIFE.

W20A. CALCULATE W16*.01=DIVDNDS

W20B. CREATE SUMDIVDNDS:
  NUMMOS=COUNT THE NUMBER OF REAL MENTIONS TO THE MULTIMENTION MONTHS RECEIVED VARIABLE. IF CODE 13, ALL, WAS INDICATED THEN NUMMOS=12, PERIOD. IF DK/RF LISTED ANYWHERE THEN NUMMOS=99. IF LEAD-IN NE 1 THEN NUMMOS=0.

  IF AMT=DK/RF OR PER LT 3 OR PER=DK/RF OR PER=3,4,5 AND NUMMOS=99 THEN GO TO W21
  ELSE DO
    IF PER=3 THEN SUMDIVDNDS=NUMMOS*4.33*AMOUNT
    IF PER=4 THEN SUMDIVDNDS=NUMMOS*2.17*AMOUNT
    IF PER=5 THEN SUMDIVDNDS=NUMMOS*AMOUNT
    IF PER=6 THEN SUMDIVDNDS=AMOUNT
  DO THESE CALCS USING G27B FOR MONTHS, G26B FOR AMOUNT, AND G26BPER FOR PER. OUTPUT VAR IS HDDIVDNDS.

  IF G59BB=5 OR G59B3=1 THEN REPEAT USING G59B4 FOR MONTHS, G59B FOR AMOUNT, AND G59BPER FOR PER. OUTPUT VAR IS WFDIVDNDS. IF G59BB=1 OR G59B3=5 OR G59 NE 2 OR G59B NOT ASKED (NO WIFE; WIFE HAS NO INCOME), THEN WFDIVDNDS=0.

  SUMDIVDNDS=HDDIVDNDS+WFDIVDNDS.
  1. SUMDIVDNDS < DIVDNDS | 5. ALL OTHERS → GO TO W21
          ↓

W20D. Earlier you reported $[SUMDIVDNDS] for [your / your and your wife's / your and "WIFE's" / HEAD's and your / HEAD's / HEAD's and his wife's / HEAD's and WIFE's / HEAD's and "WIFE's"] dividends last year. Now that we've talked about the value of [*R=FU MEMBER*: your / *R=PROXY*: their] stocks, would you say this amount for dividends is about right?
  1. Yes → GO TO W21   5. No
          ↓

W20E. How much was it altogether [*WIFE/"WIFE"IN FU*: for both of you]?
  • ENTER amount here, then ENTER unit of time on next screen (Month, Year)
  $ 0 → GO TO W21 $ 1 – 999,997 | DK/RF → GO TO W20F
          ↓

  W20EPER. The amount entered is: [W20E] per ___
    • SELECT the unit of time below
    5. Month | 6. Year | 7. Other-specify → W20EPERSPEC. Specify. (String 100)

W20F. During which months of [PYEAR] did [*R=FU MEMBER*: you / *R=PROXY*: they] get this income?
  • ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June | |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

W21. (Do [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or anyone in your family living there] / *R=PROXY*: they] have…)
Any money in private annuities or Individual Retirement Accounts (IRAs)?

| 1. Yes | 5. No | → GO TO W27

↓

W21A. Are they mostly in stocks, mostly in interest earning assets, split between the two, or what?

| 1. Mostly stocks | 2. Mostly interest earning | 3. Split |

W22. How much would they be worth?

| $ 0 – 9,999,997 | → GO TO W27 | DK/RF |

↓

W23. Would it amount to $25,000 or more?

| 1. Yes | | 5. No | DK/RF | → GO TO W27

↓   ↓

W24. $50,000 or more?   W25. $5,000 or more?

| 1. Yes | 5. No | DK/RF | | 1. Yes | 5. No | DK/RF |
↓   GO TO W27   GO TO W27

W26. $100,000 or more?

| 1. Yes | 5. No | DK/RF |
GO TO W27

W27. Not including employer-based pensions or IRAs already mentioned, do [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or anyone in your family living there] / *R=PROXY*: they] have any money in any of the following: Checking or savings accounts,
Money market funds,
Certificates of deposit,
Government savings bonds, or
Treasury bills?

| 1. YES, one or more | 5. NO, none | → GO TO W33

↓

W28. If you added up all such accounts for [*CYEAR FU COUNT>1*: all of [*R=FU MEMBER*: your / *R=PROXY*: the] family living there], about how much would they amount to altogether right now?

| $ 0 – 9,999,997 | → GO TO W31CCKPT | DK/RF |

↓

W29. Would they amount to $5,000 or more?

| 1. Yes | | 5. No | DK/RF | → GO TO W33

↓

W30. $10,000 or more?   W32. $1,000 or more?

| 1. Yes | 5. No | DK/RF | | 1. Yes | 5. No | DK/RF |
↓   GO TO W33   GO TO W33

W31. $50,000 or more?

| 1. Yes | 5. No | DK/RF |
GO TO W33

W31CCKPT. CAI CHECKPOINT: RATIO OF HEAD & WIFE/ WIFE" INTEREST TO EXPECTED INTEREST

IF AN AMOUNT IS REPORTED AT W28 (VALUE OF ALL MONEY IN ACCOUNTS), ESTIMATED INTEREST IS CALCULATED USING W31A–F, AND COMPARED TO INTEREST REPORTED FOR THE HEAD AND WIFE IN SECTION G.

W31A. CALCULATE W28*.03=INTEREST

W31B. CREATE SUMINTEREST:

NUMMOS=COUNT THE NUMBER OF REAL MENTIONS TO THE MULTIMENTION MONTHS RECEIVED VARIABLE. IF CODE 13, ALL, WAS INDICATED THEN NUMMOS=12, PERIOD. IF DK/RF LISTED ANYWHERE THEN NUMMOS=99. IF LEAD-IN NE 1 THEN NUMMOS=0.

IF AMT=DK/RF OR PER LT 3 OR PER=DK/RF OR PER=3,4,5 AND NUMMOS=99 THEN GO TO W33
ELSE DO
      IF PER=3 THEN SUMINTEREST=NUMMOS*4.33*AMOUNT
      IF PER=4 THEN SUMINTEREST=NUMMOS*2.17*AMOUNT
      IF PER=5 THEN SUMINTEREST=NUMMOS*AMOUNT
      IF PER=6 THEN SUMINTEREST=AMOUNT
DO THESE CALCS USING G27C FOR MONTHS, G26C FOR AMOUNT, AND G26CPER FOR PER. OUTPUT VAR IS HDINTEREST.

IF G59CC=5 OR G59C3=1 THEN REPEAT USING G59C4 FOR MONTHS, G59C FOR AMOUNT, AND G59CPER FOR PER. OUTPUT VAR IS WFINTEREST. IF G59CC=1 OR G59C3=5 OR G59 NE 3 OR G59C NOT ASKED (NO WIFE; WIFE HAS NO INCOME), THEN WFINTEREST=0.

SUMINTEREST=HDINTEREST+WFINTEREST.

| 1. SUMINTEREST < INTEREST | | 5. ALL OTHERS | → GO TO W33

↓

W31D. Earlier you reported $[SUMINTEREST] for [your / your and your wife's / your and "WIFE's" / HEAD's and your / HEAD's / HEAD's and his wife's / HEAD's and WIFE's / HEAD's and "WIFE's"] interest last year. Now that we've talked about [*R=FU MEMBER*: your / *R=PROXY*: their] accounts, would you say this interest amount is about right?

| 1. Yes | → GO TO W33 | 5. No |

↓

W31E. How much was it altogether [*WIFE/"WIFE"IN FU*: for both of you]?
- ENTER amount here, then ENTER unit of time on next screen (Month, Year)

| $ 0 | → GO TO W33 | $ 1 – 999,997 | | DK/RF | → GO TO W31F

↓

W31EPER. The amount entered is: [W31E] per ___
- SELECT the unit of time below

| 5. Month | | 6. Year | | 7. Other-specify | → W31EPERSPEC. Specify. (String 100)

W31F. During which months of [PYEAR] did [*R=FU MEMBER*: you / *R=PROXY*: they] get this income?
- ENTER all that apply

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |
| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December | 13. All |

W33. (Do [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or anyone in your family living there] / *R=PROXY*: they] have…)
Any other savings or assets, such as bond funds, cash value in a life insurance policy, a valuable collection for investment purposes, or rights in a trust or estate that you haven't already told us about?

| 1. Yes | 5. No | → GO TO W38A

↓

W34. If [*R=FU MEMBER*: you / *R=PROXY*: they] sold that and paid off any debts on it, how much would [*R=FU MEMBER*: you / *R=PROXY*: they] have?

| $ -99,999,999 – 999,999,997 | → GO TO W38A | DK/RF |

↓

W35. Would it amount to $10,000 or more?

| 1. Yes | | 5. No || DK/RF | → GO TO W38A

↓   ↓

W36. $25,000 or more?   W37. $2,000 or more?

| 1. Yes || 5. No || DK/RF | | 1. Yes || 5. No || DK/RF |

GO TO W38A   GO TO W38A

Credit Card Debt

W38A. Aside from the debts that we have already talked about, [*A23=YES MTGE*: like any mortgage on [*R=FU MEMBER*: your / *R=PROXY*: their] main home [*F65/F67=YES VEH LOAN>0*: [or / like] vehicle loans,]] do [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or anyone in your family living there] / *R=PROXY*: they] currently have any credit card or store card debt?

| 1. Yes || 5. No | → GO TO W38B

↓

W39A. If you added up all credit card and store card debts for [*CYEAR FU COUNT>1*: all of [*R=FU MEMBER*: your / *R=PROXY*: the] family living there], about how much would they amount to right now?

| $ 1 – 9,999,997 | → GO TO W38B | DK/RF |

↓

W40A. Would they amount to $2,000 or more?

| 1. Yes | | 5. No || DK/RF | → GO TO W38B

↓   ↓

W41A. (Would they amount to)   W42A. (Would they amount to)

$5,000 or more? $1,000 or more?

| 1. Yes || 5. No || DK/RF | | 1. Yes || 5. No || DK/RF |

GO TO W38B   GO TO W38B

Student Loans, Medical Bills, Legal Bills, Loans From Relatives Debt

W38B. Do [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or anyone in your family living there] / *R=PROXY*: they] currently have any other debts such as student loans, medical or legal bills, or loans from relatives?
- ENTER all that apply
- PROBE: Any others?

1. Student loans	ASK W39B1–W42B1
2. Medical bills	ASK W39B2–W42B2
3. Legal bills	ASK W39B3–W42B3
4. Loans from relatives	ASK W39B4–W42B4
5. No	→ GO TO W43

W38B=Student Loans

W39B1. If you added up all student loans [*CYEAR FU COUNT>1*: for all of [*R=FU MEMBER*: your / *R=PROXY*: the] family living there], about how much would they amount to right now?
- INCLUDE unpaid balance(s), or student loans that are outstanding

$ 0 – 9,999,997 | → GO TO NEXT ITEM; | DK/RF
THEN GO TO W43 | ↓

W40B1. Would they amount to $2,000 or more?

| 1. Yes | | 5. No | DK/RF | → GO TO NEXT ITEM; |
| ↓ | | ↓ | | THEN TO W43 |

W41B1. (Would they amount to) $5,000 or more?

| 1. Yes | 5. No | DK/RF |

W42B1. (Would they amount to) $1,000 or more?

| 1. Yes | 5. No | DK/RF |

GO TO NEXT ITEM; THEN TO W43

W38B= Medical Bills

W39B2. If you added up all medical bills [*CYEAR FU COUNT>1*: for all of [*R=FU MEMBER*: your / *R=PROXY*: the] family living there], about how much would they amount to right now?
- INCLUDE unpaid balance(s), or medical bills that are outstanding

$ 0 – 9,999,997 | → GO TO NEXT ITEM; | DK/RF
THEN GO TO W43 | ↓

W40B2. Would they amount to $2,000 or more?

| 1. Yes | | 5. No | DK/RF | → GO TO NEXT ITEM; |
| ↓ | | ↓ | | THEN TO W43 |

W41B2. (Would they amount to) $5,000 or more?

| 1. Yes | 5. No | DK/RF |

W42B2. (Would they amount to) $1,000 or more?

| 1. Yes | 5. No | DK/RF |

GO TO NEXT ITEM; THEN TO W43

W38B= Legal Bills

W39B3. If you added up all legal bills [*CYEAR FU COUNT>1*: for all of [*R=FU MEMBER*: your / *R=PROXY*: the] family living there], about how much would they amount to right now?

- INCLUDE unpaid balance(s), or legal bills that are outstanding

$ 0 – 9,999,997   → GO TO NEXT ITEM;   DK/RF
                     THEN GO TO W43   ↓

W40B3. Would they amount to $2,000 or more?

1. Yes   5. No   DK/RF → GO TO NEXT ITEM;
   ↓   ↓   THEN TO W43

W41B3. (Would they amount to)   W42B3. (Would they amount to)

$5,000 or more? $1,000 or more?

1. Yes   5. No   DK/RF   1. Yes   5. No   DK/RF

GO TO NEXT ITEM; THEN TO W43

W38B= Loans From Relatives

W39B4. If you added up all loans from relatives [*CYEAR FU COUNT>1*: for all of [*R=FU MEMBER*: your / *R=PROXY*: the] family living there], about how much would they amount to right now?

- INCLUDE unpaid balance(s), or loans from relatives that are outstanding

$ 0 – 9,999,997   → GO TO NEXT ITEM;   DK/RF
                     THEN GO TO W43   ↓

W40B4. Would they amount to $2,000 or more?

1. Yes   5. No   DK/RF → GO TO NEXT ITEM;
   ↓   ↓   THEN TO W43

W41B4. (Would they amount to)   W42B4. (Would they amount to)

$5,000 or more? $1,000 or more?

1. Yes   5. No   DK/RF   1. Yes   5. No   DK/RF

GO TO NEXT ITEM; THEN TO W43

W43. These next questions are about changes in [*R=FU MEMBER*: your / *R=PROXY*: their] wealth during the last two years. [*R=FU MEMBER*: In these questions, when I refer to you I mean you and any family members living with you during that time.]

Since January [P2YEAR], did [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or anyone in your family living there] / *R=PROXY*: they] **put aside money in any private annuities or IRAs**?

1. Yes   5. No → GO TO W48
   ↓

W44. How much did that amount to?

$ 0 – 9,999,997   → GO TO W48   DK/RF
                                      ↓

W45. Was it $10,000 or more?

1. Yes   5. No   DK/RF → GO TO W48
   ↓   ↓

W46. $50,000 or more?   W47. $5,000 or more?

1. Yes   5. No   DK/RF   1. Yes   5. No   DK/RF

GO TO W48   GO TO W48

W48. (Since January [P2YEAR], did [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or anyone in your family living there] / *R=PROXY*: they]…)

Cash in any part of a pension, private annuity or IRA?

| 1. Yes | 5. No | → GO TO W54

↓

W49. How much did that amount to?

$ 0 – 9,999,997 → GO TO W54   DK/RF

↓

W50. Was it $10,000 or more?

1. Yes   5. No   DK/RF   → GO TO W54

↓   ↓

W51. $50,000 or more?   W53. $5,000 or more?

1. Yes | 5. No | DK/RF   1. Yes | 5. No | DK/RF

↓   GO TO W54   GO TO W54

W52. $100,000 or more?

1. Yes | 5. No | DK/RF

GO TO W54

W54. (Since January [P2YEAR], did [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or anyone in your family living there] / *R=PROXY*: they]…)

Sell any home [*R=FU MEMBER*: **you** / *R=PROXY*: **they**] **were using as** [*R=FU MEMBER*: **your** / *R=PROXY*: **their**] **main dwelling**?

| 1. Yes | 5. No | → GO TO W59

↓

W55. About how much was the selling price, not including selling commissions and costs?
- IF R sold more than one main home, ask about the one owned in January, [P2YEAR]

$ 0 – 9,999,997 → GO TO W59   DK/RF

↓

W56. Was it $60,000 or more?

1. Yes   5. No   DK/RF   → GO TO W59

↓   ↓

W57. $120,000 or more?   W58. $30,000 or more?

1. Yes | 5. No | DK/RF   1. Yes | 5. No | DK/RF

GO TO W59   GO TO W59

W59. (Since January [P2YEAR], did [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or anyone in your family living there] / *R=PROXY*: they]...)
Buy any real estate other than [*R=FU MEMBER*: **your** / *R=PROXY*: **their**] **main home**, such as a vacation home, land (not including farmland), or rental property?

| 1. Yes | 5. No | → GO TO W64

↓

W60. Altogether, how much money did [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or anyone in your family living there] / *R=PROXY*: they] put into that?

| $ 0 – 9,999,997 | → GO TO W64 | DK/RF |

↓

W61. Was it $60,000 or more?

| 1. Yes | | 5. No | DK/RF | → GO TO W64

↓   ↓

W62. $120,000 or   W63. $30,000 or more?

| 1. Yes | 5. No | DK/RF | | 1. Yes | 5. No | DK/RF |

GO TO W64   GO TO W64

W64. (Since January [P2YEAR], did [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or anyone in your family living there] / *R=PROXY*: they]...)
Sell any real estate other than [*R=FU MEMBER*: **your** / *R=PROXY*: **their**] **main home**, such as a vacation home, land (not including farmland), or rental property?

| 1. Yes | 5. No | → GO TO W69

↓

W65. Altogether, how much money did [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or anyone in your family living there] / *R=PROXY*: they] get from that?

| $ -99,999,999 – 999,999,997 | → GO TO W69 | DK/RF |

↓

W66. Was it $60,000 or more?

| 1. Yes | | 5. No | DK/RF | → GO TO W69

↓   ↓

W67. $120,000 or more?   W68. $30,000 or more?

| 1. Yes | 5. No | DK/RF | | 1. Yes | 5. No | DK/RF |

GO TO W69   GO TO W69

W69. (Since January [P2YEAR], did [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or anyone in your family living there] /
R=PROXY: they]…)
Make additions or improvements totaling $10,000 or more to any homes or other real estate [*R=FU MEMBER &
CYEAR FU COUNT=1*: you / *R=FU MEMBER & CYEAR FU COUNT>1*: any of you / *R=PROXY & CYEAR FU COUNT=1*:
they / *R=PROXY & CYEAR FU COUNT>1*: any of them] owned? Do **not** count general maintenance or upkeep.

| 1. Yes | 5. No | → GO TO W73

↓

W70. What was the total dollar cost of the additions or improvements, **plus** the value of any work [*R=FU
MEMBER*: you / *R=PROXY*: they] may have done [*R=FU MEMBER*: yourself / *R=PROXY*: themselves]?

| $ 10,000 – 9,999,997 | → GO TO W73 | DK/RF |

↓

> W71. Was it $25,000 or more?
>
> | 1. Yes || 5. No || DK/RF |
> ↓   GO TO W73
> W72. $75,000 or more?
> | 1. Yes || 5. No || DK/RF |
> GO TO W73

W73. (Since January [P2YEAR], did [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or anyone in your family living there] /
R=PROXY: they]…)
Put money into a business or farm?

| 1. Yes | 5. No | → GO TO W78

↓

W74. Altogether, how much money did [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or anyone in your family living
there] / *R=PROXY*: they] put into that?

| $ 0 – 9,999,997 | → GO TO W78 | DK/RF |

↓

> W75. Was it $25,000 or more?
>
> | 1. Yes | | 5. No || DK/RF | → GO TO W78
> ↓   ↓
> W76. $100,000 or   W77. $10,000 or more?
> | 1. Yes || 5. No || DK/RF | | 1. Yes || 5. No || DK/RF |
> GO TO W78   GO TO W78

W78. (Since January [P2YEAR], did [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or anyone in your family living there] / *R=PROXY*: they]…)
Sell part or all of [*R=FU MEMBER*: **your** / *R=PROXY*: **their**] **interest in a business or farm**?

| 1. Yes | 5. No | → GO TO W83

↓

W79. Altogether, how much money did [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or anyone in your family living there] / *R=PROXY*: they] get from that?

| $ -99,999,999 – 999,999,997 | → GO TO W83 | DK/RF |

↓

W80. Was it $25,000 or more?

| 1. Yes | | 5. No | DK/RF | → GO TO W83

↓   ↓

W81. $100,000 or more?   W82. $10,000 or more?

| 1. Yes | 5. No | DK/RF | | 1. Yes | 5. No | DK/RF |
GO TO W83   GO TO W83

W83. (Since January [P2YEAR], did [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or anyone in your family living there] / *R=PROXY*: they]…)
Buy any shares of stock in publicly held corporations, mutual funds, or investment trusts, including any automatic reinvestments – not including any IRAs?

| 1. Yes | 5. No | → GO TO W96

↓

W84. Did [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or anyone in your family living there] / *R=PROXY*: they] also **sell** any such assets?

| 1. Yes | 5. No | → GO TO W91

↓

W85. Did [*R=FU MEMBER*: you / *R=PROXY*: they] **buy more** or **sell more** – that is, on balance, did [*R=FU MEMBER*: you / *R=PROXY*: they] put money into stocks, mutual funds, or investment trusts, take money out of them, or put about as much in as [*R=FU MEMBER*: you / *R=PROXY*: they] took out?

| 1. Put money in | 2. Took money out | 3. Put about as much in as took out | → GO TO W102

↓

W86. About how much money did [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or anyone in your family living there] / *R=PROXY*: they] [*W85=1*: put in / *W85=2*: take out]?

| $ 0 – 9,999,997 | → GO TO W102 | DK/RF |

↓

W87. Was it $20,000 or more?

| 1. Yes | | 5. No | DK/RF | → GO TO W102

↓   ↓

W88. $50,000 or more?   W89. $5,000 or more?

| 1. Yes | 5. No | DK/RF | | 1. Yes | 5. No | DK/RF |
↓   GO TO W102   GO TO W102

W90. $100,000 or more?

| 1. Yes | 5. No | DK/RF |
GO TO W102

W91. Altogether, how much money did [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or anyone in your family living there] / *R=PROXY*: they] put in?

$ 0 – 9,999,997   → GO TO W102   DK/RF

↓

W92. Was it $20,000 or more?

1. Yes   5. No   DK/RF → GO TO W102

↓   ↓

W93. $50,000 or more?   W95. $5,000 or more?

1. Yes   5. No   DK/RF   1. Yes   5. No   DK/RF

↓   GO TO W102   GO TO W102

W94. $100,000 or more?

1. Yes   5. No   DK/RF

GO TO W102

NOTE: W96 excludes IRAs

W96. Since January [P2YEAR] did [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or anyone in your family living there] / *R=PROXY*: they] **sell any shares** of stock in publicly held corporations, mutual funds, or investment trusts?

1. Yes   5. No   → GO TO W102

↓

W97. Altogether, how much money did [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or anyone in your family living there] / *R=PROXY*: they] get from that?

$ -99,999,999 – 999,999,997 → GO TO W102   DK/RF

↓

W98. Was it $20,000 or more?

1. Yes   5. No   DK/RF → GO TO W102

↓   ↓

W99. $50,000 or more?   W101. $5,000 or more?

1. Yes   5. No   DK/RF   1. Yes   5. No   DK/RF

↓   GO TO W102   GO TO W102

W100. $100,000 or more?

1. Yes   5. No   DK/RF

GO TO W102

W102. Sometimes changes in a family's savings or assets are due to people joining or leaving the family. Was there anyone living with [*R=FU MEMBER*: you / *R=PROXY*: them] in January [P2YEAR] **who doesn't live with** [*R=FU MEMBER*: **you** / *R=PROXY*: **them**] **now and who took $5,000 or more in assets or debts away with them**?

| 1. Yes | 5. No | → GO TO W112CKPT
↓

W103. Altogether, what is the total dollar value of **assets that were removed that way**?

| $ 0 – 9,999,997 | → GO TO W108 | DK/RF |
↓

W104. Was it $10,000 or more?

| 1. Yes | | 5. No | DK/RF | → GO TO W108
↓   ↓

W105. $25,000 or   W107. $5,000 or more?

| 1. Yes | 5. No | DK/RF | | 1. Yes | 5. No | DK/RF |
↓   GO TO W108   GO TO W108

W106. $100,000 or more?

| 1. Yes | 5. No | DK/RF |
GO TO W108

W108. Altogether, what is the total dollar value of **debts that were removed** that way?

| $ 0 – 9,999,997 | → GO TO W112CKPT | DK/RF |
↓

W109. Was it $10,000 or more?

| 1. Yes | | 5. No | DK/RF | → GO TO W112CKPT
↓   ↓

W110. $25,000 or   W111. $5,000 or more?

| 1. Yes | 5. No | DK/RF | | 1. Yes | 5. No | DK/RF |
GO TO W112CKPT   GO TO W112CKPT

W108 SOFT CHECK (SUPPRESS=continue, CLOSE=W108,GOTO=W103/W108)
IF W103 + W108 < $ 5,000:
Reported assets and debts removed total less than $5,000
Please verify amounts at W103 and W108

W112CKPT. CAI CHECKPOINT: WHETHER THERE ARE OTHER CURRENT FU MEMBERS BESIDES HEAD

| 1. OTHER FU MEMBERS | 5. HEAD ONLY | → GO TO W123
↓

W113. Is there anyone in [*R=FU MEMBER*: your / *R=PROXY*: their] family living with [*R=FU MEMBER*: you / *R=PROXY*: them] now who has **joined the family** since January [P2YEAR] **and who had $5,000 or more in assets or debts** at the time they joined the family?

| 1. Yes | 5. No | → GO TO W123
↓

W114. Altogether, what is the total dollar value of **assets that were brought into the family** that way?

$ 0 – 9,999,997 → GO TO W119   DK/RF

↓

W115. Was it $10,000 or more?

1. Yes   5. No   DK/RF → GO TO W119

↓   ↓

W116. $25,000 or more?   W118. $5,000 or more?

1. Yes   5. No   DK/RF   1. Yes   5. No   DK/RF

↓   GO TO W119   GO TO W119

W117. $100,000 or more?

1. Yes   5. No   DK/RF

GO TO W119

W119. Altogether, what is the total dollar value of **debts that were brought into the family** that way?

$ 0 – 9,999,997 → GO TO W123   DK/RF

↓

W120. Was it $10,000 or more?

1. Yes   5. No   DK/RF → GO TO W123

↓   ↓

W121. $25,000 or more?   W122. $5,000 or more?

1. Yes   5. No   DK/RF   1. Yes   5. No   DK/RF

GO TO W123   GO TO W123

W119 SOFT CHECK (SUPPRESS=continue, CLOSE=W119,GOTO=W114/W119)
IF W114 + W119 < $ 5,000:
   Reported assets and debts brought total less than $5,000
   Please verify amounts at W114 and W119

W123. Some people's assets come from gifts and inheritances. During the last two years, have [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: or anyone in your family living there] / *R=PROXY*: they] received any large gifts or inheritances of money or property worth **$10,000 or more**?

1. Yes   5. No   → GO TO SECTION P

↓

W124. What year did [*R=FU MEMBER*: you / *R=PROXY*: they] receive that?
- ENTER actual year [P2YEAR], [PYEAR], or [CYEAR]
- ENTER [9997] if it has not yet been received

[P2YEAR]–[CYEAR]   9997. Not yet received   → GO TO W128

↓

W125. How much was it worth altogether, **at that time**?

$ 10,000 – 9,999,997 → GO TO W128   DK/RF

↓

W126. Would it amount to $25,000 or more?

1. Yes 5. No DK/RF

↓   GO TO W128

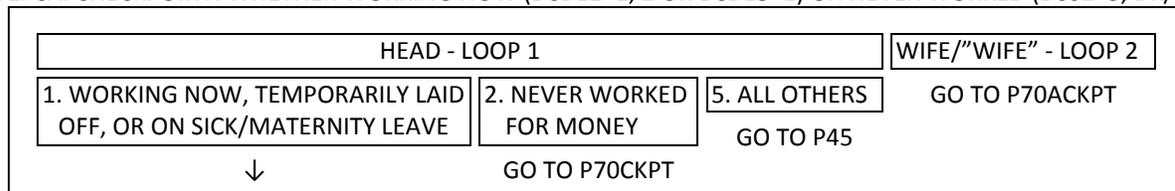W127. $75,000 or more?

1. Yes 5. No   DK/RF

GO TO W128

W128. Did [*R=FU MEMBER*: you / *R=PROXY*: they] receive any **other** large gifts or inheritances of money or property in the last two years?

1. Yes → REPEAT W124–W128; MAX=3;   5. No → GO TO SECTION P
THEN GO TO SECTION P

Section P: Pensions
Return to TOC

P0CKPT1. CAI CHECKPOINT: WHETHER WORKING NOW (BCDE1=1, 2 OR BCDE3=1) OR NEVER WORKED (BC62=5, DK/RF)

HEAD - LOOP 1			WIFE/"WIFE" - LOOP 2
1. WORKING NOW, TEMPORARILY LAID OFF, OR ON SICK/MATERNITY LEAVE	2. NEVER WORKED FOR MONEY	5. ALL OTHERS GO TO P45	GO TO P70ACKPT
↓	GO TO P70CKPT		

PDETAILAQSN. AQSN OF HEAD/WIFE/"WIFE"

P1. [CYAQRTH, CYNAMF CYNAML], Current Employer: [BCEmpName/DEEmpName]
   [*FIRST ITERATION*: Next, I need to get some information about pensions and retirement plans.]
   Not including Social Security or Railroad Retirement, [are / is] [you / HEAD / WIFE/"WIFE"] participating in a pension or retirement plan through [your / his / her] present job [*EMPLOYER NAME IS RESPONSE*: at [CMJ EMPLOYER]] [*BC27/DE27=YES*: , or through [your / his / her] union]?
   - If R says "participating but hasn't recently contributed", ENTER [1]
   - If R says "eligible but not participating", ENTER [5]

   1. Yes → GO TO P6YRS   5. No   DK/RF → GO TO P42
                        ↓

   P1A. [CYAQRTH, CYNAMF CYNAML], Current Employer: [BCEmpName/DEEmpName]
      [Are / Is] [you / he / she] currently eligible for such a plan?

      1. Yes → GO TO P42   5. No   DK/RF → GO TO P42
                        ↓

      P7. [CYAQRTH, CYNAMF CYNAML], Current Employer: [BCEmpName/DEEmpName]
         Will [you / he / she] become eligible for such a plan if [you / he / she] continue[s] to work for this employer?

         1. Yes   5. No → GO TO P42
              ↓

         P8YRS. [CYAQRTH, CYNAMF CYNAML], Current Employer: [BCEmpName/DEEmpName]
            How many more years must [you / he / she] work for this employer to become eligible for this plan?
            - ENTER number between 1 and 25

            1 – 25
            GO TO P42

P6YRS. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([BCEmpName/DEEmpName])
   How many years [have / has] [you / he / she] been participating in this plan?
   - If R says there are multiple plans, PROBE: Please tell me about the plan [you / he / she] [have / has] participated in the longest.
   - ENTER number of years in pension or retirement plan or PRESS [Enter] to go to the next screen to record the year started

   [Enter]   0 – 50   DK/RF
        ↓   GO TO P9

P6YR. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([BCEmpName/DEEmpName])
(In which year did [you / he / she] start participating in this plan?)
- If R says there are multiple plans, PROBE: Please tell me about the plan [you / he / she] [have / has] participated in the longest.
- ENTER year started in pension or retirement plan

| 1901 – [CYEAR] |

P9. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([BCEmpName/DEEmpName])
There is a law that states that once you have been in a pension or retirement plan for enough years, you can be sure of some benefits even if you leave that employer. This is called "vesting".
[Have / Has] [you / he / she] worked under the main or basic plan long enough to earn this right to be "vested"?

| 1. Yes | → GO TO P11 | 5. No || DK/RF | → GO TO P11

↓

P10YRS. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([BCEmpName/DEEmpName])
How many more years must [you / he / she] be included in this plan in order to eventually earn the right to receive some benefits from it at retirement even if [you / he / she] leave[s] [your / his / her] present employer?
- ENTER number between 1 and 35

| 1 – 35 |

P11. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([BCEmpName/DEEmpName])
[Are / Is] [you / he / she] making any contributions to [your / his / her] pension or retirement account such as having money deducted from your [your / his / her] pay?

| 1. Yes || 5. No | → GO TO P16

↓

P12. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([BCEmpName/DEEmpName])
[Are / Is] [you / he / she] required to contribute?

| 1. Yes || 5. No | → GO TO P15AMT

↓

P13AMT. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([BCEmpName/DEEmpName])
What amount or percent of pay [are / is] [you / he / she] required to contribute?
- ENTER dollar amount here, then ENTER unit of time on next screen (Week, Two weeks, Month, Year)
- OR press [Enter] to continue to next screen for Percent

| [Enter] | → GO TO P13PCT | $ 1 – 9,999,997 || DK/RF | → GO TO P14

↓

P13PER. The amount entered is: [P13AMT] per _____
- SELECT the unit of time below

| 3. Week | 4. Two weeks | 5. Month | 6. Year |
| 7. Other-specify | → P13PERSPEC. Specify. (String 100)

GO TO P14

P13PCT. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([BCEmpName/DEEmpName])
(What percent of pay [are / is] [you / he / she] required to contribute?)
- ENTER a percentage from 1 to 25

| 0 – 100 |

P14. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([BCEmpName/DEEmpName])
[Do / Does] [you / he / she] also make voluntary contributions?

| 1. Yes | 5. No | → GO TO P16

↓

P15AMT. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([BCEmpName/DEEmpName])
What amount or percent of pay [do / does] [you / he / she] voluntarily contribute currently?
- ENTER dollar amount here, then ENTER unit of time on next screen (Week, Two weeks, Month, Year)
- OR press [Enter] to continue to next screen for Percent

[Enter] → GO TO P15PCT $ 1 – 9,999,997   DK/RF → GO TO P16

↓

P15PER. The amount entered is: [P15AMT] per ____
- SELECT the unit of time below

| 3. Week | 4. Two weeks | 5. Month | 6. Year |
| 7. Other-specify | → P15PERSPEC. Specify. (String 100) |

GO TO P16

P15PCT. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([BCEmpName/DEEmpName])
(What percent of pay [do / does] [you / he / she] voluntarily contribute currently?)
- ENTER a percentage from 1 to 25

| 0 – 100 |

P16. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([BCEmpName/DEEmpName])
Some pension and retirement plans base benefits on a formula involving age, years of service and salary, often called a <u>defined benefit plan</u>. Some plans base benefits on how much money has accumulated in a person's pension or retirement account, often called a <u>defined contribution plan</u>. Other plans use both ways of setting benefits.
What type of plan [do / does] [you / HEAD / WIFE/"WIFE"] have?
- Defined Contribution plans include 401-K, 403-B, ESOP, SRA, thrift/savings, stock/profit sharing, and money purchase plans

| 1. Defined benefit plan | 5. Defined contribution plan / Money accumulated in account | 7. Both | DK/RF |
| GO TO P22CKPT | | ↓ | GO TO P22CKPT |

↓

P17. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([BCEmpName/DEEmpName])
Does [your / his / her] employer make contributions to [your / his / her] account?

| 1. Yes | 5. No | → GO TO P20

↓

P18AMT. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([BCEmpName/DEEmpName])
What amount or percent of pay does [your / his / her] employer contribute to [your / his / her] account?
- ENTER dollar amount here, then ENTER unit of time on next screen (Week, Two weeks, Month, Year)
- OR press [Enter] to continue to next screen for Percent

[Enter] → GO TO P18PCT $ 1 – 9,999,997   DK/RF → GO TO P19

↓

P18PER. The amount entered is: [P18AMT] per _____
- SELECT the unit of time below

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

7. Other-specify	→ P18PERSPEC. Specify. (String 100)

GO TO P19

P18PCT. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([BCEmpName/DEEmpName])
(What percent of pay does [your / his / her] employer contribute to [your / his / her] account?)
- ENTER a percentage from 1 to 25

0 – 100

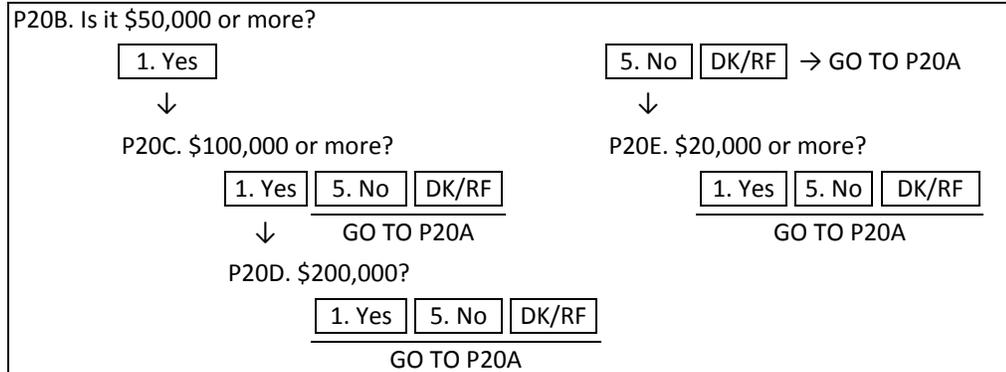P19. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([BCEmpName/DEEmpName])
At what age could [you / he / she] first receive retirement benefits that include [your / his / her] employer's contributions?

31 – 100

P20. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([BCEmpName/DEEmpName])
What is the approximate dollar amount in [your / his / her] account now?

$ 1 – 999,999,997	→ GO TO P20A DK/RF

↓

P20B. Is it $50,000 or more?

1. Yes		5. No	DK/RF	→ GO TO P20A

↓   ↓

P20C. $100,000 or more?   P20E. $20,000 or more?

1. Yes	5. No	DK/RF		1. Yes	5. No	DK/RF

↓   GO TO P20A   GO TO P20A

P20D. $200,000?
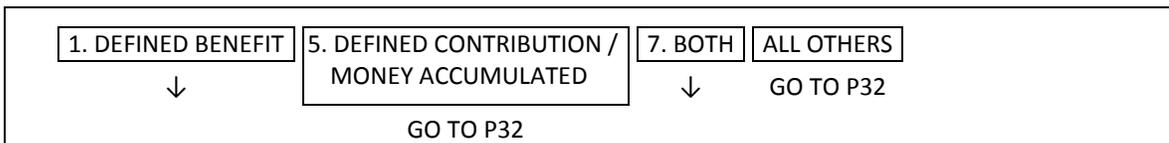
1. Yes	5. No	DK/RF

GO TO P20A

P20A. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([BCEmpName/DEEmpName])
Are the funds invested mostly in stocks or mostly in bonds and annuities, some of each, or what?

1. Mostly (or all) stocks	2. Some of each	3. Mostly (or all) bonds and annuities

P22CKPT. CAI CHECKPOINT: WHETHER PENSION IS DB (P16=1), DC (P16=5), OR BOTH (P16=7)

1. DEFINED BENEFIT	5. DEFINED CONTRIBUTION / MONEY ACCUMULATED	7. BOTH	ALL OTHERS
↓		↓	GO TO P32

GO TO P32

P22A. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([BCEmpName/DEEmpName])
What is the earliest age at which [you / he / she] would be eligible to receive "full" or "normal" pension or retirement benefits?
- ENTER number of years; ENTER months at next screen
- ENTER [997] for Any time; any age; no age requirement
- If R says "already eligible", PROBE: What is the earliest age at which [you / he / she] would have been eligible (to receive full" or "normal" pension or retirement benefits)?

| 31 – 100 | | 997. Any time; any age; no age requirement (IF VOL) | | DK /RF |

↓   GO TO P22C

P22B. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([BCEmpName/DEEmpName])
(What is the earliest age at which [you / he / she] would be eligible to receive "full" or "normal" pension or retirement benefits?)
- ENTER number of months; PRESS [Enter] for no months

| 1 – 11 |

P22C. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([BCEmpName/DEEmpName])
What is the earliest age at which [you / he / she] could leave [your / his / her] employer and receive any (pension or retirement) benefits immediately?
- ENTER number of years; ENTER months at next screen
- ENTER [997] for Any time; any age; no age requirement
- If R says "already eligible", PROBE: What is the earliest age at which [you / he / she] could have done so (leave [your / his / her] employer and receive any (pension or retirement) benefits immediately)?

| 31 – 100 | | 997. Any time; any age; no age requirement (IF VOL) | | DK /RF |

↓   GO TO P32

P22D. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([BCEmpName/DEEmpName])
(What is the earliest age at which [you / he / she] could leave [your / his / her] employer and receive any (pension or retirement) benefits immediately?)
- ENTER number of months; PRESS [Enter] for no months

| 1 – 11 |

P32. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([BCEmpName/DEEmpName])
At what age [do / does] [you / he / she] expect to start receiving retirement benefits from this pension or retirement plan?
- ENTER [997] for Never; won't stay long enough

| [CURRENT AGE (18)] – 75 | | 997. Never; won't stay long enough |

P34AMT. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([BCEmpName/DEEmpName])
How much [do / does] [you / he / she] expect to receive (either as a percent of [your / his / her] pay at retirement or as an amount per month or year)?
- ENTER dollar amount here, then ENTER unit of time on next screen (Month, Year)
- OR press [Enter] to continue to next screen for Percent

| [Enter] | → GO TO P34PCT | $ 1 – 9,999,997 | | DK/RF | → GO TO P34F

↓

P34PER. The amount entered is: [P34AMT] per _____
- SELECT the unit of time below

| 5. Month | 6. Year | | 7. Other-specify | → P34PERSPEC. Specify. (String 100)

GO TO P35

P34PCT. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([BCEmpName/DEEmpName])
(How much [do / does] [you / he / she] expect to receive (as a percent of [your / his / her] pay at retirement)?)
- ENTER a percentage from 1 to 100

| 1 – 100 | → GO TO P35 | DK/RF |

↓

P34F. Will it be 40% of [your / his / her] pay or more?

| 1. Yes | | 5. No | DK/RF | → GO TO P35 |

↓   ↓

P34G. 60% or more (of [your / his / her]   P34J. 20% or more (of [your / his / her]

| 1. Yes | 5. No | DK/RF | | 1. Yes | 5. No | DK/RF |

↓   GO TO P35   GO TO P35

P34H. 80% or more (of [your / his / her] pay)?

| 1. Yes | 5. No | DK/RF |

GO TO P35

P35. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([BCEmpName/DEEmpName])
Can [you / he / she] designate a survivor or other person who would receive [your / his / her] pension or retirement benefits if [you / he / she] should die before receiving [your / his / her] full entitlement?

| 1. Yes | 5. No | → GO TO P37 |

↓

P36. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([BCEmpName/DEEmpName])
How much of [your / his / her] pension or retirement benefit would [your / his / her] beneficiary receive if they were to live longer than [you / him / her]: all of it or some of it?

| 1. All | 3. Some | 7. Specify | → P36SPEC. Please tell me what that might be? (String 100)

P37. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([BCEmpName/DEEmpName])
Does the amount of [your / his / her] pension or retirement benefit depend on Social Security benefits? That is, when [you / he / she] start[s] receiving Social Security benefits will [your / his / her] pension or retirement benefits be reduced?

| 1. Yes | 5. No | → GO TO P39AGE |

↓

P38. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([BCEmpName/DEEmpName])
When will this change take place: automatically at age 62, automatically at age 65, when [you / he / she] start[s] receiving Social Security benefits, or at some other time?

| 1. At age 62 | 2. At age 65 | 3. When Social Security benefits begin | 7. At some other time |

P39AGE. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([BCEmpName/DEEmpName])
On [your / his / her] present job [*EMPLOYER NAME IS RESPONSE*: at [CMJ EMPLOYER]], what is the usual retirement age (or years of service) for people who work with [you / him / her] or have the same kind of job?
- ENTER usual age of retirement or press [Enter] to continue to next screen for years of service

| [Enter] | 20 – 75 | DK/RF |

↓   GO TO P40AGE   ↓

P39YRS. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([BCEmpName/DEEmpName])
(What is the <u>usual</u> number of years of service for retirement?)
- ENTER number of years

| 1 – 50 |

P40AGE. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([BCEmpName/DEEmpName])
Now I want to ask about [your / HEAD's / WIFE's/"WIFE's"] plans for retirement. At what age [do / does] [you / he / she] <u>plan</u> to stop working?
- ENTER age or press [Enter] to continue to next screen for number of years
- ENTER [997] for Never

| [Enter] | | 17 – [CURRENT AGE (75)] | | 997. Never | | DK/RF | → GO TO P41AGE
↓   GO TO P42

P40NUM. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([BCEmpName/DEEmpName])
(In how many years [do / does] [you / he / she] <u>plan</u> to stop working?)
- ENTER number of years

| 1 – 50 | | DK/RF |
GO TO P42   ↓

P41AGE. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([BCEmpName/DEEmpName])
At what age [do / does] [you / he / she] <u>think</u> [you / he / she] will stop working?
- ENTER age or press [Enter] to continue to next screen for number of years
- ENTER [997] for Never

| [Enter] | | 17 – [CURRENT AGE (75)] | | 997. Never | | DK/RF |
↓   GO TO P42

P41NUM. [CYAQRTH, CYNAMF CYNAML], Plan Through Current Employer ([BCEmpName/DEEmpName])
(In how many years [do / does] [you / he / she] <u>think</u> [you / he / she] will stop working?)
- ENTER number of years

| 1 – 50 | | DK/RF |

P42. [CYAQRTH, CYNAMF CYNAML], Other Plan(s) Through Current Employer ([BCEmpName / DEEmpName])
[*P1=YES*: In addition to the pension or retirement plan you already mentioned, [do / does] [you / HEAD / WIFE/"WIFE"] / *ALL OTHERS*: [Do / Does] [you / HEAD / WIFE/"WIFE"]] have any tax-deferred compensation or savings plans on this job, such as a "thrift", profit-sharing, or Keogh plan?

| 1. Yes | | 5. No | → GO TO P45
↓

P43. [CYAQRTH, CYNAMF CYNAML], Other Plan(s) Through Current Employer ([BCEmpName / DEEmpName])
Does [your / his / her] employer make contributions to any such plan for [you / him / her]?

| 1. Yes | | 5. No | → GO TO P45
↓

P44AMT. [CYAQRTH, CYNAMF CYNAML], Other Plan(s) Through Current Employer ([BCEmpName / DEEmpName])

What amount or percent of pay does [your / his / her] employer contribute?
- ENTER dollar amount here, then ENTER unit of time on next screen (Week, Two weeks, Month, Year)
- OR press [Enter] to continue to next screen for Percent

| [Enter] | → GO TO P44PCT | $ 1 – 9,999,997 | DK/RF | → GO TO P45 |

↓

P44PER. The amount entered is: [P44AMT] per ____
- SELECT the unit of time below

| 3. Week | 4. Two weeks | 5. Month | 6. Year |
| 7. Other-specify | → P44PERSPEC. Specify. (String 100) |

GO TO P45

P44PCT. [CYAQRTH, CYNAMF CYNAML], Other Plan(s) Through Current Employer ([BCEmpName / DEEmpName])

(What percent of pay does [your / his / her] employer contribute?)
- ENTER a percentage from 1 to 100

| 1 – 100 |

P45. [CYAQRTH, CYNAMF CYNAML]

[*LOOP 2 & WIFE/"WIFE" NOT WORKING NOW*: (These next questions are about pensions or retirement plans through a former employer.)] / *ALL OTHERS*: These next questions are about pensions or retirement plans through a former employer.].

Aside from IRA or Keogh Plans, [do / does] [you / HEAD / WIFE/"WIFE"] have any pensions or retirement plans from previous employers from which [you / he / she] expect[s] to receive benefits?

| 1. Yes | 5. No | → GO TO P70CKPT |

↓

P46. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer

[*P1=YES & P46 LOOP 1*: What type of plan was this second pension or retirement plan? A <u>defined benefit plan</u> that bases benefits on a formula involving age, years of service and salary, or a <u>defined contribution plan</u> that bases benefits on how much money has accumulated in a person's pension or retirement account? / *ALL OTHERS*: I would like to know what type of plan this was. Was it a <u>defined benefit plan</u> that bases benefits on a formula involving age, years of service and salary, or a <u>defined contribution plan</u> that bases benefits on how much money has accumulated in a person's pension or retirement account?

- Defined Contribution plans include 401-K, 403-B, ESOP, SRA, thrift/savings, stock/profit sharing, and money purchase plans

| 1. Defined benefit plan | 5. Defined contribution plan / Money accumulated in account | 7. Both | DK | RF |
| GO TO P52 | GO TO P62ACKPT | ↓ | GO TO P52 | GO TO P70CKPT |

P47. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer

For the part of [your / his / her] pension or retirement plan where money is accumulated in an account, how much money was in [your / his / her] account when [you / he / she] left that employer?

$ 0 – 99,999,997   → GO TO P48   DK/RF
                                          ↓

P47B. Was it $20,000 or more?

1. Yes   5. No   DK/RF   → GO TO P48
  ↓   ↓

P47C. $50,000 or more?   P47E. $5,000 or more?

1. Yes   5. No   DK/RF   1. Yes   5. No   DK/RF
  ↓   GO TO P48   GO TO P48

P47D. $150,000 or more?

1. Yes   5. No   DK/RF

GO TO P48

P48. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer

When [you / he / she] left that employer, did [you / he / she] withdraw this money, roll it over into an IRA, leave it to accumulate in the old plan, convert it to an annuity, or what?

- IF more than one response given, ENTER [7] and record all details

1. Withdrew the money   2. Rolled over into IRA   3. Left to accumulate   4. Converted to annuity
     GO TO P52   GO TO P49   GO TO P50

7. Other; more than one mention-   → P48SPEC. Specify. (String 100)   DK/RF

GO TO P52

P49. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer

How much is in [your / his / her] account now?

$ 1 – 99,999,997   → GO TO P52   DK/RF
                                          ↓

P49B. Is it $50,000 or more?

1. Yes   5. No   DK/RF   → GO TO P52
  ↓   ↓

P49C. $100,000 or more?   P49E. $20,000 or more?

1. Yes   5. No   DK/RF   1. Yes   5. No   DK/RF
  ↓   GO TO P52   GO TO P52

P49D. $200,000?

1. Yes   5. No   DK/RF

GO TO P52

P50. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer
How old [were / was] [you / he / she] when [you / he / she] started receiving the benefits from that annuity?
- IF benefits have not yet begun, PROBE: At what age will [you / he / she] begin receiving them?
  20 – 75

P51. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer
How much are the annuity benefits per month or year?
- IF benefits have not yet begun, PROBE: What will the benefits be once [you / he / she] begin[s] receiving them?
- ENTER dollar amount here, then ENTER unit of time on next screen (Month, Year)

  $ 1 – 9,999,997 | DK/RF → GO TO P51B
  ↓
P51PER. The amount entered is: [P51] per _____
- SELECT the unit of time below
  5. Month | 6. Year | 7. Other-specify → P51PERSPEC. Specify. (String 100)
  GO TO P52

P51B. Are they $400 or more per month?

| 1. Yes | | 5. No | DK/RF → GO TO P52 |

↓ (left)   ↓ (right)

P51C. $1,200 or more (per month)?   P51E. $200 or more (per month)?

1. Yes | 5. No | DK/RF   1. Yes | 5. No | DK/RF
↓   GO TO P52   GO TO P52

P51D. $1,600 or more (per month)?

1. Yes | 5. No | DK/RF
GO TO P52

P52. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer
[*P46=BOTH*: Now about the part of [your / his / her] pension or retirement plan where benefits are based on a formula. / *ALL OTHERS*: (Now about the part of [your / his / her] pension or retirement plan where benefits are based on a formula.)]
[Do / Does] [you / HEAD / WIFE/"WIFE"] expect to receive benefits from this plan in the future, [are / is] [you / he / she] receiving benefits now, did [you / he / she] get a cash settlement when [you / he / she] left, did [you / he / she] lose [your / his / her] benefits, or what?
- DO NOT PROBE for multiple responses but ENTER all that apply.

1. Expect future benefits	ASK P60–P67E
2. Receiving benefits now	ASK P53MO–P56
3. Received cash settlement	ASK P57–P58
4. Rolled over into IRA	ASK P59–P59E
5. Lost benefits	→ GO TO P67ACKPT IF 1–4 NOT SELECTED
7. Other-specify → P52SPEC. Specify. (String 100)	→ GO TO P67ACKPT IF 1–4 NOT SELECTED

P52ACKPT. CAI CHECKPOINT: WHETHER HEAD/ WIFE/"WIFE" RECEIVING BENEFITS (P52=2)

1. RECEIVING BENEFITS NOW	5. ALL OTHERS	→ GO TO P56ACKPT
↓		

P53MO. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer
In what month and year did [you / he / she] start to receive these benefits?
- SELECT month and [Enter] to go to next screen for year

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December
21. Winter	22. Spring	23. Summer	24. Fall		

P53YR. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer
The month entered is: [P53MO]
- ENTER the year below

1901 – [CYEAR]

P54. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer
How much are the benefits per month or year?
- IF benefits have not yet begun, PROBE: What will the benefits be once [you / he / she] begin[s] receiving them?
- ENTER dollar amount here, then ENTER unit of time on next screen (Month, Year)

$ 1 – 9,999,997	DK/RF	→ GO TO P54B

↓

P54PER. The amount entered is: [P54] per _____
- SELECT the unit of time below

5. Month	6. Year	7. Other-specify	→ P54PERSPEC. Specify. (String 100)

GO TO P55

P54B. Are they $400 or more per month?

1. Yes		5. No	DK/RF	→ GO TO P55
↓		↓		

P54C. $1,200 or more (per month)?   P54E. $200 or more (per month)?

1. Yes	5. No	DK/RF		1. Yes	5. No	DK/RF

↓   GO TO P55   GO TO P55

P54D. $1,600or more (per month)?

1. Yes	5. No	DK/RF

GO TO P55

P55. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer
Are the benefits adjusted for changes in the cost of living?

1. Yes → GO TO P56ACKPT   5. No   DK   RF → GO TO P56ACKPT
↓

P56. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer
Have they ever been adjusted for changes in the cost of living?

1. Yes   5. No

P56ACKPT. CAI CHECKPOINT: WHETHER HEAD/WIFE/"WIFE" RECEIVED CASH (P52=3)

1. RECEIVED CASH   5. ALL OTHERS → GO TO P58ACKPT
↓

P57. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer
How much did that cash settlement amount to?

$ 1 – 99,999,997   → GO TO P58   DK/RF
↓

P57B. Was it $6,000 or more?

1. Yes   5. No   DK/RF → GO TO P58
↓   ↓
P57C. $60,000 or more?   P57E. $2,000 or more?

1. Yes   5. No   DK/RF   1. Yes   5. No   DK/RF
↓   GO TO P58   GO TO P58
P57D. $250,000 or more?

1. Yes   5. No   DK/RF
GO TO P58

P58. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer
What did [you / he / she] do with the money?
- ENTER all that apply
- PROBE: Any others?

1. Bought durables   2. Spent it   3. Saved / invested   4. Paid off debt   5. Rolled into IRA
7. Other-specify   → P58SPEC. Specify. (String 100)

P58A. CAI CHECKPOINT: WHETHER HEAD/WIFE/"WIFE" ROLLED $$ INTO IRA (P52=4)

1. ROLLED OVER INTO IRA   5. ALL OTHERS → GO TO P59ACKPT
↓

P59. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer
How much did that IRA rollover amount to?
$ 1 – 99,999,997 → GO TO P59ACKPT   DK/RF
                                              ↓

P59B. Was it $6,000 or more?
    1. Yes   5. No   DK/RF → GO TO P59ACKPT
      ↓   ↓
P59C. $60,000 or more?   P59E. $2,000 or more?
  1. Yes 5. No   DK/RF   1. Yes 5. No   DK/RF
    ↓   GO TO P59ACKPT   GO TO P59ACKPT
P59D. $250,000 or more?
  1. Yes   5. No   DK/RF
       GO TO P59ACKPT

P59ACKPT. CAI CHECKPOINT: WHETHER HEAD/WIFE/"WIFE" EXPECTS BENEFITS (P52=1)

    1. EXPECTS FUTURE BENEFITS   5. ALL OTHERS → GO TO P67ACKPT
                ↓

P60. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer
For how many years altogether [were / was] [you / he / she] included in this plan?
• INCLUDE years with other employers if same plan.
1 – 50

P61. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer
At what age [do / does] [you / he / she] expect to start receiving (the rest of [your / his / her]) benefits from this plan?
• ENTER [97] if already receiving all benefits
20 – [CURRENT AGE (75)]   97. Already receiving all benefits

P62AMT. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer
How much [do / does] [you / he / she] expect to receive (, either as a percent of [your / his / her] pay when [you / he / she] left that job or as an amount per month or year)?
• ENTER dollar amount here, then ENTER unit of time on next screen (Month, Year)
• OR press [Enter] to continue to next screen for Percent
[Enter] → GO TO P62PCT $ 1 – 999,997   DK/RF → GO TO P62F
                                            ↓
P62PER. The amount entered is: [P62AMT] per ____
• SELECT the unit of time below
5. Month 6. Year 7. Other-specify → P62PERSPEC. Specify. (String 100)
           GO TO P62ACKPT

P62PCT. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer
(How much [do / does] [you / he / she] expect to receive (, as a percent of [your / his / her] pay when [you / he / she] left that job)?)
- ENTER a percentage from 1 to 100

| 1 – 100 | → GO TO P62ACKPT | | DK/RF |

↓

P62F. Will it be 40% of [your / his / her] pay or more?

| 1. Yes | | | 5. No | DK/RF | → GO TO P62ACKPT |

↓ ↓

P62G. 60% or more (of [your / his / her] pay)?   P62J. 20% or more (of [your / his / her] pay)?

| 1. Yes | 5. No | DK/RF | | 1. Yes | 5. No | DK/RF |

↓   GO TO P62ACKPT   GO TO P62ACKPT

P62H. 80% or more (of [your / his / her] pay)?

| 1. Yes | 5. No | DK/RF |

GO TO P62ACKPT

P62ACKPT. CAI CHECKPOINT: WHETHER PENSION IS DC (P46=5) OR DB AMOUNT IS DK/RF (P62AMT= DK/RF)

| 1. P62AMT IS DK/RF | 3. DEFINED CONTRIBUTION / MONEY ACCUMULATED | 5. ALL OTHERS | → GO TO P67ACKPT |

↓

P63. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer
How much money was in [your / his / her] account when [you / he / she] left that employer?

| $ 1 – 9,999,997 | → GO TO P64 | | DK/RF |

↓

P63B. Was it $20,000 or more?

| 1. Yes | | | 5. No | DK/RF | → GO TO P64 |

↓ ↓

P63C. $50,000 or more?   P63E. $5,000 or more?

| 1. Yes | 5. No | DK/RF | | 1. Yes | 5. No | DK/RF |

↓   GO TO P64   GO TO P64

P63D. $150,000 or more?

| 1. Yes | 5. No | DK/RF |

GO TO P64

P64. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer
When [you / he / she] left that employer, did [you / he / she] transfer [your / his / her] account to a new employer, roll it over into an IRA, leave it to accumulate in [your / his / her] old plan, convert it to an annuity or what?
- If more than one response given, ENTER [7] and record all details

1. Transferred to new employer	2. Rolled over into IRA	3. Left to accumulate	4. Converted to annuity
GO TO P67ACKPT	GO TO P65		GO TO P66

7. Other -specify	→ P64SPEC. Specify. (String 100)	DK/RF

GO TO P67ACKPT

P65. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer
How much is in [your / his / her] account now?

$ 1 – 99,999,997	→ GO TO P67ACKPT	DK/RF

↓

P65B. Is it $50,000 or more?

1. Yes		5. No	DK/RF	→ GO TO P67ACKPT

↓ (P65C)   ↓ (P65E)

P65C. $100,000 or more?   P65E. $20,000 or more?

1. Yes	5. No	DK/RF		1. Yes	5. No	DK/RF

↓   GO TO P67ACKPT   GO TO P67ACKPT

P65D. $200,000 or more?

1. Yes	5. No	DK/RF

GO TO P67ACKPT

P66. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer
How old [were / was] [you / he / she] when [you / he / she] started receiving the benefits from that annuity?
- IF benefits have not yet begun, PROBE: At what age will [you / he / she] begin receiving them?

20 – 75

P67. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer
How much are the annuity benefits per month or year?
- IF benefits have not yet begun, PROBE: What will the benefits be once [you / he / she] begin[s] receiving them?
- ENTER dollar amount here, then ENTER unit of time on next screen (Month, Year)

$ 1 – 9,999,997	DK/RF	→ GO TO P67B

↓

P67PER. The amount entered is: [P67] per _____
- SELECT the unit of time below

5. Month	6. Year	7. Other-specify	→ P67PERSPEC. Specify. (String 100)

GO TO P67ACKPT

P67B. Are they $400 or more per month?

| 1. Yes | | 5. No | DK/RF | → GO TO P67ACKPT |

↓ ↓

P67C. $1,200 or more (per month)?   P67E. $200 or more (per month)?

| 1. Yes | 5. No | DK/RF | | 1. Yes | 5. No | DK/RF |

↓   GO TO P67ACKPT   GO TO P67ACKPT

P67D. $1,600or more (per month)?

| 1. Yes | 5. No | DK/RF |

GO TO P67ACKPT
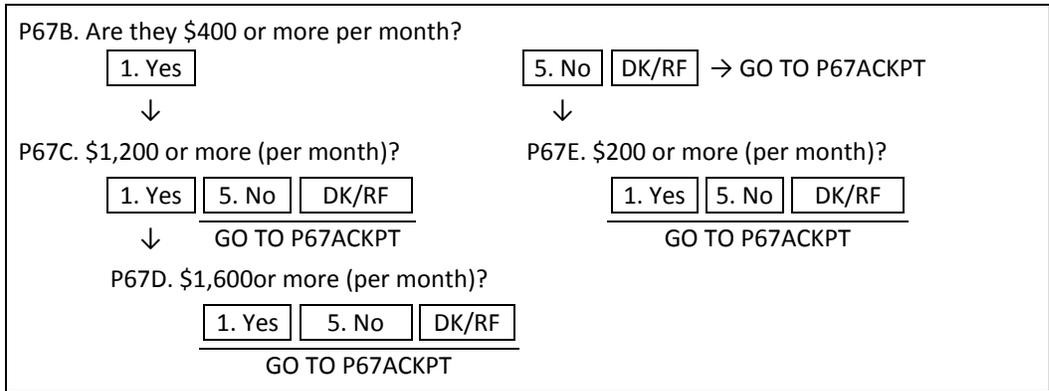
P67ACKPT. CAI CHECKPOINT: PENSION IS DB, DC, BOTH, OR DK (P46=1, 5, 7, 8)

| 1. DEFINED BENEFIT, DEFINED CONTRIBUTION, BOTH, DK | | 5. ALL OTHERS | → GO TO P69 |

↓
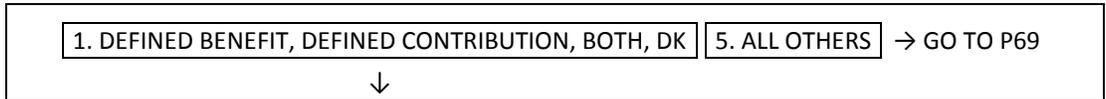
P68AGE. [CYAQRTH, CYNAMF CYNAML], Plan #[1 / 2] Through a Former Employer
What is the earliest age at which [you / he / she] could have left that employer and begun to receive pension or retirement benefits?
- ENTER [97] if No age requirement

| 20 – 75 | | 97. No age requirement |
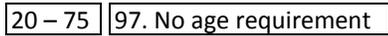
P69. [CYAQRTH, CYNAMF CYNAML]
[Do / Does] [you / HEAD / WIFE/"WIFE"] have any other pensions or retirement plans from a former employer (that you haven't already told me about)?

| 1. Yes | → REPEAT P46–P68; MAX=2; | 5. No |
THEN GO TO P70CKPT   ↓

P70CKPT. CAI CHECKPOINT: WHETHER WIFE/"WIFE" IN FU (CYFUHU=1, 4 & CYAQRTH=202, 222)

| 1. WIFE/"WIFE" IN FU | 5. ALL OTHERS | → GO TO SECTION H |

↓
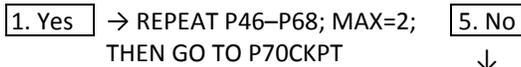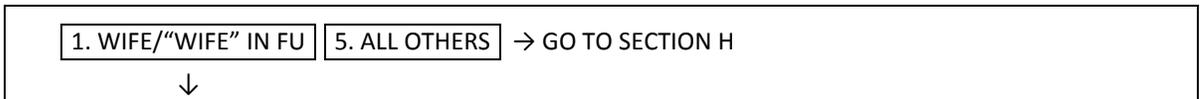
P70ACKPT. CAI CHECKPOINT: WHETHER WORKING NOW (BCDE1=1, 2 OR BCDE3=1) OR NEVER WORKED (DE62=5, DK/RF)

WIFE/"WIFE" - LOOP 2		
1. WORKING NOW, TEMPORARILY LAID OFF, OR ON SICK/MATERNITY LEAVE	2. NEVER WORKED FOR MONEY	5. ALL OTHERS
		ASK P45–P69;
ASK P1–P69; THEN GO TO SECTION H	GO TO SECTION H	THEN GO TO SECTION H
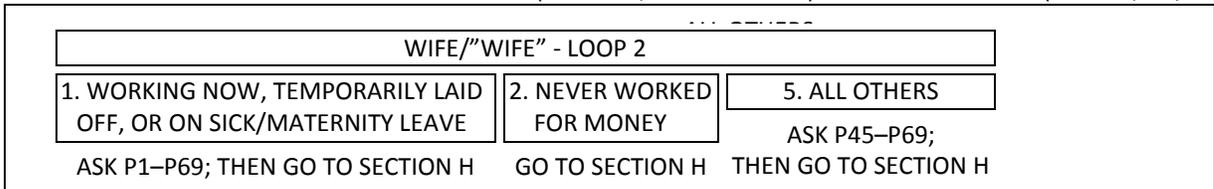
Section H: Health and Health Care Costs
Return to TOC

H1 RULE. ASK FOR HEAD AND WIFE/"WIFE" IF IN FU (CYFUHU=1, 4 & CYAQRTH=202, 222)

HEAD - LOOP 1	ALL OTHERS	→ GO TO H24CKPT
↓		

H1. Now I have a few questions about [your / HEAD's / WIFE's/"WIFE's"] health.
Would you say [your / HEAD's / WIFE's/"WIFE's"] health in general is excellent, very good, good, fair, or poor?

1. Excellent	2. Very good	3. Good	4. Fair	5. Poor

H1A. [*SAME HEAD/WIFE/"WIFE"*: Since we last talked to you about [your / his / her] health, / *NEW HEAD/WIFE/"WIFE"*:
Compared to [your / his / her] health say, two years ago,] would you say that [your / his / her] health is better now,
about the same, or worse?

1. Better	3. About the same	5. Worse
↓	GO TO H2	↓

H1B. Is it much better or somewhat better?	H1C. Is it much worse or somewhat worse?
1. Much better	1. Much worse
2. Somewhat better	2. Somewhat worse

H2. [Do / Does] [you / HEAD / WIFE/"WIFE"] have any physical or nervous condition that limits the type of work or the
amount of work [you / he / she] can do?

1. Yes	5. No	→ GO TO H5A
↓		

H3. Does this condition keep [you / HEAD / WIFE/"WIFE"] from doing **some types** of work?

1. Yes	3. Somewhat	5. No	7. Can do nothing (IF VOL)
↓		GO TO H5A	

H4. For work [you / HEAD / WIFE/"WIFE"] can do, how much does it limit **the amount** of work [you /
HEAD / WIFE/"WIFE"] can do – a lot, somewhat, or just a little?

1. A lot	3. Somewhat	5. Just a little	7. Not at all (IF VOL)

H5A. These next questions ask you about health conditions that a doctor or other health professional has **EVER** told [you /
HEAD / WIFE/"WIFE"] that [you / he / she] [have / has] or had in [your / his / her] **lifetime**. Has a doctor or other
health professional **EVER** told [you / HEAD / WIFE/"WIFE"] that [you / he / she] had...
A stroke?

1. Yes	5. No	→ GO TO H5B
↓		

H6A1. How old [were / was] [you / HEAD / WIFE/"WIFE"] the first time [you / he / she] had a stroke?

0 – [CURRENT AGE]

H6A2. [Have / Has] [you / he / she] had [*SAME H/W/"W"*& AGEIWDATE minus H6A1 > (REINT, SO: *2YEARS*;
RECON, RECSO: *4 YEARS*): another stroke since our last interview in [*REINT, SO*: [P2YEAR] / *RECON,
RECSO*: [P4YEAR]] ([PYIWDATE]) / *ALL OTHERS*: a second or subsequent stroke since that first one]?

1. Yes	5. No

H7A. How much does this condition limit [your / his / her] normal daily activities? – A lot, somewhat, just a little, or not at all?

| 1. A lot | 3. Somewhat | 5. Just a little | 7. Not at all |

H7A2. [Are / Is] [you / HEAD / WIFE/"WIFE"] now taking medication because of [your / his / her] stroke or its complications?

| 1. Yes | 5. No |

H5B. (Has a doctor or other health professional **EVER** told [you / HEAD / WIFE/"WIFE"] that [you / he / she] had…)
A heart attack?

| 1. Yes | 5. No | → GO TO H5C

↓

H6B1. How old [were / was] [you / HEAD / WIFE/"WIFE"] the first time [you / he / she] had a heart attack?

| 0 – [CURRENT AGE] |

H6B2. [Have / Has] [you / he / she] had [*SAME HEAD/WIFE/"WIFE"& AGEIWDATE minus H6B1 > (REINT, SO*: *2YEARS; RECON, RECSO*: *4 YEARS)*: another heart attack since our last interview in [*REINT, SO*: [P2YEAR] / *RECON, RECSO*: [P4YEAR]] ([PYIWDATE]) / *ALL OTHERS*: a second or subsequent heart attack since that first one]?

| 1. Yes | 5. No |

H7B. How much does this condition limit [your / his / her] normal daily activities? – A lot, somewhat, just a little, or not at all?

| 1. A lot | 3. Somewhat | 5. Just a little | 7. Not at all |

H7B2. [Are / Is] [you / HEAD / WIFE/"WIFE"] now taking or carrying medication because of [your / his / her] heart attack?

| 1. Yes | 5. No |

H5C. (Has a doctor or other health professional **EVER** told [you / HEAD / WIFE/"WIFE"] that [you / he / she] had …)
Coronary heart disease, angina, or congestive heart failure?

| 1. Yes | 5. No | → GO TO H5D

↓

H6C1. How old [were / was] [you / HEAD / WIFE/"WIFE"] when [you / he / she] [were / was] first diagnosed with (this condition / any of these conditions)?

| 0 – [CURRENT AGE] |

H7C. How much does this condition limit [your / his / her] normal daily activities? – A lot, somewhat, just a little, or not at all?

| 1. A lot | 3. Somewhat | 5. Just a little | 7. Not at all |

H7C2. [Are / Is] [you / HEAD / WIFE/"WIFE"] now taking or carrying medication for [your / his / her] coronary heart disease, angina or congestive heart failure?

| 1. Yes | 5. No |

H5D. (Has a doctor or other health professional **EVER** told [you / HEAD / WIFE/"WIFE"] that [you / he / she] had …)
High blood pressure or hypertension?

| 1. Yes | 5. No | → GO TO H5E
↓

H6D1. How old [were / was] [you / HEAD / WIFE/"WIFE"] when [you / he / she] [were / was] first diagnosed with high blood pressure or hypertension?

| 0 – [CURRENT AGE] |

H7D. How much does this condition limit [your / his / her] normal daily activities? – A lot, somewhat, just a little, or not at all?

| 1. A lot | 3. Somewhat | 5. Just a little | 7. Not at all |

H7D2. [Are / Is] [you / HEAD / WIFE/"WIFE"] now taking medication to lower [your / his / her] blood pressure?

| 1. Yes | 5. No |

H5E. (Has a doctor or other health professional **EVER** told [you / HEAD] / WIFE/"WIFE"] that [you / he / she] had …)
Asthma?

| 1. Yes | 5. No | → GO TO H5F
↓

H6E1. How old [were / was] [you / HEAD / WIFE/"WIFE"] when [you / he / she] [were / was] first diagnosed with asthma?

| 0 – [CURRENT AGE] |

H7E. How much does this condition limit [your / his / her] normal daily activities? – A lot, somewhat, just a little, or not at all?

| 1. A lot | 3. Somewhat | 5. Just a little | 7. Not at all |

H7E2. In order to treat or control [your / his / her] asthma, [are / is] [you / HEAD / WIFE/"WIFE"] now taking or carrying medication or an inhaler?

| 1. Yes | 5. No |

H5F. (Has a doctor or other health professional **EVER** told [you / HEAD / WIFE/"WIFE"] that [you / he / she] had …)
Chronic lung disease such as bronchitis or emphysema?

| 1. Yes | 5. No | → GO TO H5G
↓

H6F1. How old [were / was] [you / HEAD / WIFE/"WIFE"] when [you / he / she] [were / was] first diagnosed with (lung disease / bronchitis / emphysema)?

| 0 – [CURRENT AGE] |

H7F. How much does this condition limit [your / his / her] normal daily activities? – A lot, somewhat, just a little, or not at all?

| 1. A lot | 3. Somewhat | 5. Just a little | 7. Not at all |

H7F2. [Are / Is] [you / HEAD / WIFE/"WIFE"] now taking medication or receiving oxygen or other treatment for [your / his / her] lung condition?

| 1. Yes | 5. No |

H5G. (Has a doctor or other health professional **EVER** told [you / HEAD] / WIFE/"WIFE"] that [you / he / she] had ...)
Diabetes or high blood sugar?

| 1. Yes | | 5. No | → GO TO H5H

↓

H6G1. How old [were / was] [you / HEAD / WIFE/"WIFE"] when [you / he / she] [were / was] first diagnosed with diabetes?

| 0 – [CURRENT AGE] |

H7G. How much does this condition limit [your / his / her] normal daily activities? – A lot, somewhat, just a little, or not at all?

| 1. A lot | | 3. Somewhat | | 5. Just a little | | 7. Not at all |

H7G2. In order to treat or control [your / his / her] diabetes, [are / is] [you / HEAD / WIFE/"WIFE"] now taking medication that [you / he / she] swallow[s] or using insulin shots or a pump?

| 1. Yes | | 5. No |

H5H. (Has a doctor or other health professional **EVER** told [you / HEAD / WIFE/"WIFE"] that [you / he / she] had ...)
Arthritis or rheumatism?

| 1. Yes | | 5. No | → GO TO H5I

↓

H6H1. How old [were / was] [you / HEAD / WIFE/"WIFE"] when [you / he / she] [were / was] first diagnosed with (arthritis / rheumatism)?

| 0 – [CURRENT AGE] |

H7H. How much does this condition limit [your / his / her] normal daily activities? – A lot, somewhat, just a little, or not at all?

| 1. A lot | | 3. Somewhat | | 5. Just a little | | 7. Not at all |

H7H2. [Are / Is] [you / HEAD / WIFE/"WIFE"] now taking medication or receiving treatment for [your / his / her] arthritis or rheumatism?

| 1. Yes | | 5. No |

H5I. (Has a doctor or other health professional **EVER** told [you / HEAD / WIFE/"WIFE"] that [you / he / she] had ...)
Permanent loss of memory or loss of mental ability?

| 1. Yes | | 5. No | → GO TO H5J

↓

H6I1. How old [were / was] [you / HEAD / WIFE/"WIFE"] when [you / he / she] [were / was] first diagnosed with (loss of memory / mental ability)?

| 0 – [CURRENT AGE] |

H7I. How much does this condition limit [your / his / her] normal daily activities? – A lot, somewhat, just a little, or not at all?

| 1. A lot | | 3. Somewhat | | 5. Just a little | | 7. Not at all |

H7I2. [Are / Is] [you / HEAD / WIFE/"WIFE"] now taking medication prescribed by a doctor to help with [your / his / her] memory problem?

| 1. Yes | 5. No |

H5J. (Has a doctor or other health professional **EVER** told [you / HEAD / WIFE/"WIFE"] that [you / he / she] had d…)
A learning disorder?

| 1. Yes | 5. No | → GO TO H5K

↓

H6J1. How old [were / was] [you / HEAD / WIFE/"WIFE"] when [you / he / she] [were / was] first diagnosed with a learning disorder?

| 0 – [CURRENT AGE] |

H7J. How much does this condition limit [your / his / her] normal daily activities? – A lot, somewhat, just a little, or not at all?

| 1. A lot | 3. Somewhat | 5. Just a little | 7. Not at all |

H7J2. [Are / Is] [you / HEAD / WIFE/"WIFE"] now receiving treatment or taking medication to help with [your / his / her] learning disorder?

| 1. Yes | 5. No |

H5K. (Has a doctor or other health professional **EVER** told [you / HEAD / WIFE/"WIFE"] that [you / he / she] had …)
Cancer or a malignant tumor?

| 1. Yes | 5. No | → GO TO H5L

↓

H6K1. How old [were / was] [you / HEAD / WIFE/"WIFE"] when [you / he / she] [were / was] first diagnosed with cancer?

| 0 – [CURRENT AGE] |

H6K3. [Are / Is] [you / HEAD / WIFE/"WIFE"] currently in treatment for [your / his / her] cancer, in remission, or has it been cured?

| 1. Treatment | 2. Remission | 3. Cured |

H6K4. What type of cancer [do / does] [you / he / she] have? (In what part of [your / his / her] body is it?)
- ENTER all that apply
- PROBE: Any others?

1. Breast cancer	2. Colon cancer	3. Lung cancer	4. Lymphoma or leukemia
5. Melanoma	6. Prostate cancer	7. Skin cancer	8. Uterine cancer
9. Ovarian cancer	10. Cervical cancer	97. Other-specify	→ H6K4SPEC. Specify (String 100)

H7K. How much does this condition limit [your / his / her] normal daily activities? – A lot, somewhat, just a little, or not at all?

| 1. A lot | 3. Somewhat | 5. Just a little | 7. Not at all |

H5L. (Has a doctor or other health professional **EVER** told [you / HEAD / WIFE/"WIFE"] that [you / he / she] had …)
Any emotional, nervous, or psychiatric problems?

| 1. Yes | 5. No | → GO TO H5M

↓

H6L1. How old [were / was] [you / HEAD / WIFE/"WIFE"] when [you / he / she] [were / was] first diagnosed?

| 0 – [CURRENT AGE] |

H6L2. What was the diagnosis? What is the emotional / psychiatric disorder?
- ENTER all that apply
- PROBE: Any others?

1. Depression	2. Bipolar disorder (mania)	3. Schizophrenia (psychosis)
4. Anxiety (panic)	5. Phobias	6. Alcohol use / abuse (alcoholism)
7. Drug use / abuse (drug addiction)		8. Obsessive compulsive

| 97. Other-specify | → H6L2SPEC. Specify (String 100)

H7L. How much does this condition limit [your / his / her] normal daily activities? – A lot, somewhat, just a little, or not at all?

| 1. A lot | 3. Somewhat | 5. Just a little | 7. Not at all |

H7L2. [Are / Is] [you / HEAD / WIFE/"WIFE"] now taking tranquilizers, antidepressants, or pills for nerves?

| 1. Yes | 5. No |

H5M. Is there any other serious, chronic condition that a doctor or other health professional **EVER** told [you / HEAD / WIFE/"WIFE"] that [you / he / she] had?

| 1. Yes | 5. No | → GO TO H8

↓

H6M1. What is that condition?

| String 500 |

H6M2. How old [were / was] [you / HEAD / WIFE/"WIFE"] when [you / he / she] [were / was] first diagnosed?

| 0 – [CURRENT AGE] |

H7M. How much does this condition limit [your / his / her] normal daily activities? – A lot, somewhat, just a little, or not at all?

| 1. A lot | 3. Somewhat | 5. Just a little | 7. Not at all |

H7M2. [Are / Is] [you / HEAD / WIFE/"WIFE"] now taking medication for this condition?

| 1. Yes | 5. No |

H8. [Were / Was] [you / HEAD / WIFE/"WIFE"] a patient in a hospital overnight or longer at any time during [PYEAR]?

      1. Yes   5. No → GO TO H9A

        ↓

      H8A. How many nights [were / was] [you / HEAD / WIFE/"WIFE"] in a hospital altogether in [PYEAR]?

- ENTER amount here, then ENTER unit of time on next screen (Nights, Weeks)

        0 – 365   DK/RF → GO TO H9A

         ↓

      H8A2. The amount entered is: [H8A]

- SELECT the unit of time below

        1. Nights   2. Weeks

H9A. The next questions are about [your / HEAD's / WIFE's/"WIFE's"] ability to do certain activities – by [yourself / himself / herself] and without special equipment.
Because of a health or physical problem, [do / does] [you / he / she] have any difficulty bathing or showering?

      1. Yes   5. No → GO TO H9B

        ↓

      H10A1. Does someone usually help [you / him / her] with that activity?

        1. Yes   5. No

      H10A2. [Do / Does] [you / he / she] usually use special equipment to do that activity?

        1. Yes   5. No

H9B. (Because of a health or physical problem, [do / does] [you / he / she] have any difficulty…)
Dressing?

      1. Yes   5. No → GO TO H9C

        ↓

      H10B1. Does someone usually help [you / him / her] with that activity?

        1. Yes   5. No

      H10B2. [Do / Does] [you / he / she] usually use special equipment to do that activity?

        1. Yes   5. No

H9C. (Because of a health or physical problem, [do / does] [you / he / she] have any difficulty…)
Eating?

      1. Yes   5. No → GO TO H9D

        ↓

      H10C1. Does someone usually help [you / him / her] with that activity?

        1. Yes   5. No

      H10C2. [Do / Does] [you / he / she] usually use special equipment to do that activity?

        1. Yes   5. No

H9D. (Because of a health or physical problem, [do / does] [you / he / she] have any difficulty…)
Getting in or out of bed or a chair?

| 1. Yes | 5. No | → GO TO H9E

↓

H10D1. Does someone usually help [you / him / her] with that activity?
| 1. Yes | 5. No |

H10D2. [Do / Does] [you / he / she] usually use special equipment to do that activity?
| 1. Yes | 5. No |

H9E. (Because of a health or physical problem, [do / does] [you / HEAD / WIFE/"WIFE"] have any difficulty…)
Walking?

| 1. Yes | 5. No | → GO TO H9F

↓

H10E1. Does someone usually help [you / him / her] with that activity?
| 1. Yes | 5. No |

H10E2. [Do / Does] [you / he / she] usually use special equipment to do that activity?
| 1. Yes | 5. No |

H9F. (Because of a health or physical problem, [do / does] [you / he / she] have any difficulty…)
Getting outside?

| 1. Yes | 5. No | → GO TO H9G

↓

H10F1. Does someone usually help [you / him / her] with that activity?
| 1. Yes | 5. No |

H10F2. [Do / Does] [you / he / she] usually use special equipment to do that activity?
| 1. Yes | 5. No |

H9G. (Because of a health or physical problem, [do / does] [you / he / she] have any difficulty…)
Using the toilet, including getting to the toilet?

| 1. Yes | 5. No | → GO TO H11A

↓

H10G1. Does someone usually help [you / him / her] with that activity?
| 1. Yes | 5. No |

H10G2. [Do / Does] [you / he / she] usually use special equipment to do that activity?
| 1. Yes | 5. No |

H11A. The next questions are about doing other activities by [yourself / himself / herself] and without special equipment. Because of a health or physical problem, [do / does] [you / HEAD / WIFE/"WIFE"] have any difficulty preparing [your / his / her] own meals?

| 1. Yes | 5. No | 7. Does not do |

GO TO H11C ↓

H11B. Is this because of a health or physical problem?

| 1. Yes | 5. No |

H11C. ([Do / Does] [you / HEAD / WIFE/"WIFE"] have any difficulty…)
Shopping for personal items or medicines?

| 1. Yes | 5. No | 7. Does not do |

GO TO H11E ↓

H11D. Is this because of a health or physical problem?

| 1. Yes | 5. No |

H11E. ([Do / Does] [you / HEAD / WIFE/"WIFE"] have any difficulty…)
Managing [your / his / her] own money, such as keeping track of expenses or paying bills?

| 1. Yes | 5. No | 7. Does not do |

GO TO H11G ↓

H11F. Is this because of a health or physical problem?

| 1. Yes | 5. No |

H11G. ([Do / Does] [you / HEAD / WIFE/"WIFE"] have any difficulty…)
Using the telephone?

| 1. Yes | 5. No | 7. Does not do |

GO TO H11J ↓

H11H. Is this because of a health or physical problem?

| 1. Yes | 5. No |

H11J. ([Do / Does] [you / HEAD / WIFE/"WIFE"] have any difficulty…)
Doing heavy housework, like scrubbing floors or washing windows?

| 1. Yes | 5. No | 7. Does not do |

GO TO H11L ↓

H11K. Is this because of a health or physical problem?

| 1. Yes | 5. No |

H11L. ([Do / Does] [you / HEAD / WIFE/"WIFE"] have any difficulty…)
Doing light housework, like doing dishes, straightening up, or light housecleaning?

| 1. Yes | 5. No | 7. Does not do |

GO TO H12A ↓

H11M. Is this because of a health or physical problem?

| 1. Yes | 5. No |

H12A. (I know you have already told me about [your / HEAD's / WIFE's/"WIFE's"] condition, but I need to ask these next questions anyway.) The next questions are about physical activities (exercise, sports, physically active hobbies...) that [you / HEAD / WIFE/"WIFE"] may do in [your / his / her] **leisure** time.
(In [your / HEAD's / WIFE's/"WIFE's"] leisure time,) how often [do / does] [you / HEAD / WIFE/"WIFE"] do VIGOROUS activities for **at least 10 minutes** that cause **heavy** sweating or **large** increases in breathing or heart rate?
- ENTER amount here, then ENTER unit of time on next screen (Day, Week, Two weeks, Month, Year)

0 → GO TO H12B   1 – 100   DK/RF → GO TO H12B
↓

H12APER. The amount entered is: [H12A] per _____
- SELECT the unit of time below

2. Day   3. Week   4. Two weeks   5. Month   6. Year
7. Other-specify   → H12APERSPEC. Specify. (String 100)

H12B. (In [your / HEAD's / WIFE's/"WIFE's"] leisure time,...)
How often [do / does] [you / HEAD / WIFE/"WIFE"] do **light or moderate** activities **for at least 10 minutes** that cause only **light** sweating or **slight to moderate** increases in breathing or heart rate?
- ENTER amount here, then ENTER unit of time on next screen (Day, Week, Two weeks, Month, Year)

0 → GO TO H12C   1 – 100   DK/RF → GO TO H12C
↓

H12BPER. The amount entered is: [H12B] per _____
- SELECT the unit of time below

2. Day   3. Week   4. Two weeks   5. Month   6. Year
7. Other-specify   → H12BPERSPEC. Specify. (String 100)

H12C. (In [your / HEAD's / WIFE's/"WIFE's"] leisure time,...)
How often [do / does] [you / HEAD / WIFE/"WIFE"] do physical activities specifically designed to **strengthen** [your / his / her] muscles such as lifting weights?
- ENTER amount here, then ENTER unit of time on next screen (Day, Week, Two weeks, Month, Year)

0 → GO TO H13   1 – 100   DK/RF → GO TO H13
↓

H12CPER. The amount entered is: [H12C] per _____
- SELECT the unit of time below

2. Day   3. Week   4. Two weeks   5. Month   6. Year
7. Other-specify   → H12CPERSPEC. Specify. (String 100)

H13. [Do / Does] [you / HEAD / WIFE/"WIFE"] smoke cigarettes?

1. Yes   5. No   → GO TO H16
↓

H14. On average, how many cigarettes per day [do / does] [you / he / she] usually smoke?
- DEFINITION: A standard pack of American cigarettes contains 20 cigarettes

0 – 200

H15. How old [were / was] [you / HEAD / WIFE/"WIFE"] when [you / he / she] first smoked cigarettes regularly?

1 – [CURRENT AGE]

GO TO H20

H16. Did [you / HEAD / WIFE/"WIFE"] ever smoke cigarettes?

    1. Yes   5. No   → GO TO H20

       ↓

       H17. On average, how many cigarettes per day did [you / he / she] smoke?
- DEFINITION: A standard pack of American cigarettes contains 20 cigarettes

         0 – 200

       H18. How old [were / was] [you / HEAD / WIFE/"WIFE"] when [you / he / she] last smoked cigarettes regularly?

         1 – [CURRENT AGE]

       H19. How old [were / was] [you / HEAD / WIFE/"WIFE"] when [you / he / she] first smoked cigarettes regularly?

         1 – [CURRENT AGE (H18)]

H20. [Do / Does] [you / HEAD / WIFE/"WIFE"] ever drink any alcoholic beverages such as beer, wine, or liquor?

    1. Yes   5. No   → GO TO H22

       ↓

       H21A. In the last year, on average, how often did [you / HEAD / WIFE/"WIFE"] have any alcohol to drink? Would you say: **less than once a month, about once a month, several times a month, about once a week, several times a week, or every day?**
- If R says "Did not drink in the last year", ENTER [1]

| 1. Less than once a month | 2. About once a month | 3. Several times a month |
| 4. About once a week | 5. Several times a week | 6. Every day | DK/RF |

                ↓   GO TO H22

         H21B. In the last year, on the days [you / he / she] drank, about how many drinks did [you / he / she] have?
- If R says "Did not drink in the last year", ENTER [0]

           0 – 25

         H21C. In the last year, on how many days [have / has] [you / he / she] had [*MALE*: five / *FEMALE*: four] or more drinks on one occasion?
- ENTER [0] for None

           0 – 365

H22. About how much [do / does] [you / HEAD / WIFE/"WIFE"] weigh?
- ENTER weight in pounds or press [Enter] to continue to next screen for kilograms
- If more than 400 pounds, ENTER [400]

    [Enter]   50 – 400   DK/RF

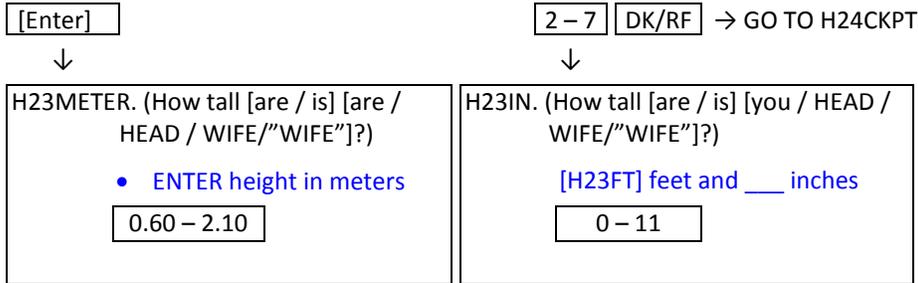   ↓   GO TO H23FT

       H22KILO. (About how much [do / does] [you / HEAD / WIFE/"WIFE"] weigh?)
- ENTER weight in kilograms
- If more than 180 kilograms, ENTER [180]

         36.0 – 180.0

150

H23FT. How tall [are / is] [you / HEAD / WIFE/"WIFE"]?

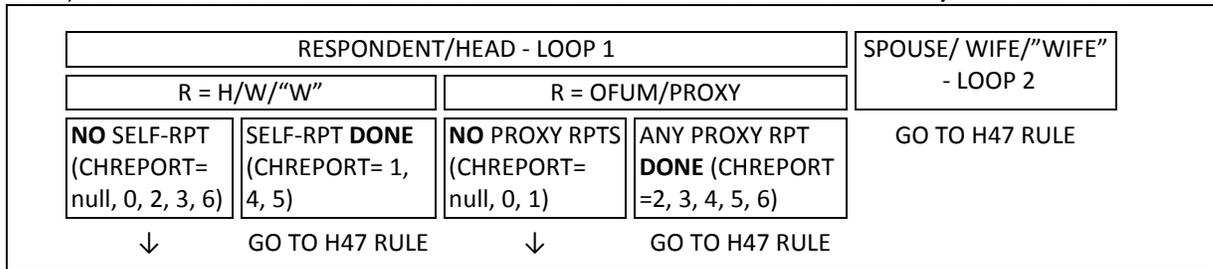- ENTER height in feet and inches or press [Enter] to continue to next screen for meters

| [Enter] | | 2 – 7 | DK/RF | → GO TO H24CKPT |

↓ ↓

H23METER. (How tall [are / is] [are / HEAD / WIFE/"WIFE"]?)	H23IN. (How tall [are / is] [you / HEAD / WIFE/"WIFE"]?)
• ENTER height in meters	[H23FT] feet and ___ inches
0.60 – 2.10	0 – 11

H24CKPT. CAI CHECKPOINT: WHETHER WIFE/"WIFE" IN FU (CYFUHU=1, 4 & CYAQRTH=202, 222)

1. WIFE/"WIFE" IN FU	→ ASK H1–H23 FOR W/"W" - LOOP 2;	5. ALL OTHERS
	THEN GO TO H25 RULE	↓

Childhood Health

H25 RULE. WHETHER R IS HEAD/WIFE/"WIFE" (RESPONDENT=1, 2, 3) OR OFUM/PROXY (RESPONDENT=4, 7); WHETHER SELF, PROXY-BY-SPOUSE OR PROXY-BY-OTHER REPORT COLLECTED **FOR RESPONDENT/HEAD** IN 2007 OR 2009

RESPONDENT/HEAD - LOOP 1				SPOUSE/ WIFE/"WIFE" - LOOP 2
R = H/W/"W"		R = OFUM/PROXY		
NO SELF-RPT (CHREPORT= null, 0, 2, 3, 6)	SELF-RPT **DONE** (CHREPORT= 1, 4, 5)	**NO** PROXY RPTS (CHREPORT= null, 0, 1)	ANY PROXY RPT **DONE** (CHREPORT =2, 3, 4, 5, 6)	GO TO H47 RULE
↓	GO TO H47 RULE	↓	GO TO H47 RULE	

HEALTHAQSN. AQSN OF HEAD/WIFE/"WIFE"
REPORTAQSN. AQSN OF RESPONDENT

H25_INTRO. These next questions ask about [your / R's / HEAD's / SPOUSE's / WIFE's/"WIFE's"] health during **childhood**, that is, before age 17. [*R IS OFUM/PROXY*: I understand that it may be difficult for you to answer these questions, but please do your best.]

- ENTER [1] to continue

| 1. Continue |

H25. Consider [your / R's / HEAD's / SPOUSE's / WIFE's/"WIFE's"] health while [you / he / she] [were / was] growing up, before [you / he / she] [were / was] 17 years old. Would you say that [your / his / her] health during that time was excellent, very good, good, fair or poor?

| 1. Excellent | 2. Very good | 3. Good | 4. Fair | 5. Poor |

H26 (H1D). When [you / he / she] [were / was] growing up, before [you / he / she] [were / was] 17 years old, did [you / he / she] miss a month or more of school because of a health problem?

| 1. Yes | 5. No |

H27. Before you were 17 years old, did you have any of the following childhood diseases:
Measles?

| 1. Yes | 5. No |

H28. (Before [you / he / she] [were / was] 17 years old, did [you / he / she] have…)
Mumps?
| 1. Yes | 5. No |

H29. (Before [you / he / she] [were / was] 17 years old, did [you / he / she] have…)
Chicken pox?
| 1. Yes | 5. No |

H30. (Before [you / he / she] [were / was] 17 years old, did [you / he / she] have…)
Difficulty seeing, even with eye glasses or prescription lenses?
| 1. Yes | 5. No |

H31. Did [your / his / her] parents or guardians smoke during [your / his / her] childhood?
| 1. Yes, one of them | 2. Yes, both of them | 5. No, none of them |

H32. Before [you / he / she] [were / was] 17 years old, did [you / he / she] have any of the following childhood diseases:
Asthma?
| 1. Yes | 5. No |

H33. (Before [you / he / she] [were / was] 17 years old, did [you / he / she] have…)
Diabetes?
| 1. Yes | 5. No |

H34. (Before [you / he / she] [were / was] 17 years old, did [you / he / she] have…)
A respiratory disorder such as bronchitis, wheezing, hay fever, shortness of breath, or sinus infection?
| 1. Yes | 5. No |

H35. (Before [you / he / she] [were / was] 17 years old, did [you / he / she] have…)
A speech impairment?
| 1. Yes | 5. No |

H36. (Before [you / he / she] [were / was] 17 years old, did [you / he / she] have…)
An allergic condition?
| 1. Yes | 5. No |

H37. (Before [you / he / she] [were / was] 17 years old, did [you / he / she] have…)
Heart trouble?
| 1. Yes | 5. No |

H38. (Before [you / he / she] [were / was] 17 years old, did [you / he / she] have…)
Chronic ear problems or infections?
| 1. Yes | 5. No |

H39. Before [you / he / she] [were / was] 17 years old, did [you / he / she] have any of the following childhood diseases:
Epilepsy or seizures?
| 1. Yes | 5. No |

H40. (Before [you / he / she] [were / was] 17 years old, did [you / he / she] have…)
Severe headaches or migraines?
1. Yes   5. No

H41. (Before [you / he / she] [were / was] 17 years old, did [you / he / she] have…)
Stomach problems?
1. Yes   5. No

H42. (Before [you / he / she] [were / was] 17 years old, did [you / he / she] have…)
High blood pressure?
1. Yes   5. No

H43. (Before [you / he / she] [were / was] 17 years old, did [you / he / she] have…)
Depression?
1. Yes   5. No

H44. (Before [you / he / she] [were / was] 17 years old, did [you / he / she] have…)
Drug or alcohol problems?
1. Yes   5. No

H45. (Before [you / he / she] [were / was] 17 years old, did [you / he / she] have…)
Any other emotional or psychological problems?
1. Yes   5. No

H46 RULE. WHETHER ANY HEALTH CONDITIONS ENDORSED FOR R/HEAD OR SPOUSE/W/"W" (H32-H45)

AT LEAST ONE CONDITION ENDORSED   NONE ENDORSED   → GO TO H47 RULE
↓

Begin Health EHC Block
CALAQSN. AQSN OF HEAD/WIFE/"WIFE"

CAL_INTRO. We would like to know more about how old [you / R / HEAD / SPOUSE / WIFE/"WIFE"] [were / was] when [you / he / she] had the health condition(s) we just talked about., but first I want to ask you about some other things that may have happened in [your / his / her] childhood.
- ENTER [1] to continue
1. Continue

Landmarks Timeline

Person: [CYNAMF CYNAML, CYAQRTH], Age: [AGEIWDATE], DOB: [CY(MO/DY/YR)BRN]

PARENTSEP. If [your / R's / HEAD's / SPOUSE's / WIFE's/"WIFE's"] parents or guardians separated during [your / his / her] childhood, please tell me how old [you / he / she] [were / was] at the time of each separation, starting with the first time they separated. Any other separations?
Yes (1) Cancel (0)

MOVE. If [you / R / HEAD / SPOUSE / WIFE/"WIFE"] moved during [your / his / her] childhood, please tell me how old [you / he / she] [were / was] at the time of each move, starting with the first move. Any other moves?
Yes (1) Cancel (0)

SCHOOL. At what age did [you / R / HEAD / SPOUSE / WIFE/"WIFE"] first start going to school? If [you / he / she] changed schools during [your / his / her] childhood, please tell me how old [you / he / she] [were / was] each time, starting with the first time. Any other school changes?
Yes (1) Cancel (0)

AGE   0 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16

*LANDMARK*EHC[0–16]

HEALTH EHC RULE. WHICH CONDITIONS ENDORSED FOR R/HEAD OR SPOUSE/W/"W" (H32–H45=YES)

H32=YES	ASK ASTHMA	H33=YES	ASK DIABETES	H34=YES	ASK RESPDISORDER
H35=YES	ASK SPEECHIMPAIR	H36=YES	ASK ALLERGY	H37=YES	ASK HEARTTROUBLE
H38=YES	ASK EARPROBLEMS	H39=YES	ASK EPILEPSY	H40=YES	ASK HEADACHES
H41=YES	ASK STOMACHPROB	H42=YES	ASK HIGHBP	H43=YES	ASK DEPRESSION
H44=YES	ASK DRUGALCOHOL	H45=YES	ASK OTHERPROB		

Health Conditions Timeline

Person: [CYNAMF CYNAML, CYAQRTH], Age: [AGEIWDATE], DOB: [CY(MO/DY/YR)BRN]
- IF R SAYS "Did not have that condition", CLICK any cell – SELECT Denial – then ENTER NOTE
- PROBE: If you don't know the exact age, please give us your best guess.
- PROBE for age using landmarks, starting with the earliest landmark

For age at which condition ended:
- IF R SAYS "Older than 16", CLICK 17+ – SELECT Yes – ENTER Age.
- IF R SAYS "Still have it", CLICK 17+ – SELECT Yes – SELECT Still Have It.

ALLERGY.
HEARTTROUBLE.
EARPROBLEMS.
EPILEPSY.
HEADACHES.
STOMACHPROB.
HIGHBP.
DEPRESSION.
DRUGALCOHOL.
OTHERPROB.
At what age [were / was] [you / R / HEAD / SPOUSE / WIFE/"WIFE"] first diagnosed with [an allergic condition /

AGE | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17+ |

*CONDITION*EHC[0–16]   *CONDITION*EHCAGEGR17

heart trouble / chronic ear problems or infections / epilepsy or seizures / severe headaches or migraines / stomach problems / high blood pressure / depression / drug or alcohol problems / any other emotional or psychological problems]? Until what age did [you / he / she] have it?

Yes (1) | Denial (7) | DK (8) | RF (9)

Enter Age [17–CURRENT AGE] (17–120) | Still have it (996) | DK (8)

H47 RULE. WHETHER WIFE/"WIFE" IN FU (CYFUHU=1, 4 & CYAQRTH=202, 222)

1. WIFE/"WIFE" IN FU | 5. ALL OTHERS | → GO TO H48CKPT
↓

H47A RULE. WHETHER R IS HEAD/WIFE/"WIFE" (RESPONDENT=1, 2, 3) OR OFUM/PROXY (RESPONDENT=4, 7); WHETHER PROXY-BY-SPOUSE OR PROXY-BY-OTHER REPORT COLLECTED FOR **SPOUSE/ WIFE/"WIFE"** IN 2007 OR 2009

SPOUSE/ WIFE/"WIFE" - LOOP 2				RESPONDENT / HEAD - LOOP 1
R = H/W/"W"		R = OFUM/PROXY		
NO PROXY-BY-SPOUSE RPT (CHREPORT =null, 0, 1, 3, 5)	PROXY-BY-SPOUSE RPT **DONE** (CHREPORT = 2, 4, 6)	**NO** PROXY RPTS (CHREPORT =null, 0, 1)	ANY PROXY RPT **DONE** (CHREPORT =2, 3, 4, 5, 6)	↓
ASK H25_INTRO-CALENDAR	↓	ASK H25_INTRO-CALENDAR	↓	

End Health EHC Block

H48CKPT. CAI CHECKPOINT: WHETHER THERE ARE OFUMS IN THE FU (CYFUHU=1, 4 & CYAQRTH>222)

| 1. OFUM IN FU | 5. ALL OTHERS | → GO TO H58 RULE |
| ↓ | | |

H49. Now about the rest of [*R=FU MEMBER*: your / *R=PROXY*: the] family living there — are any family members in poor health?

| 1. Yes | 5. No | → GO TO H58 RULE

↓

H50. Who is that?
- ENTER all that apply
- PROBE: Any others?

| 1 – 24. [CYNAMF CYNAML, CYAQRTH, CYFUHU] | *(CYAQSN list of CYEAR OFUMs: CYFUHU=FU, FUMI; CYAQRTH>222)*

H58 RULE. WHETHER RESPONDENT IS HEAD OR WIFE/"WIFE" (RESPONDENT=1, 2, 3)

| R IS HEAD/WIFE/"WIFE" | ALL OTHERS | → GO TO H60 |
| ↓ | | |

H59A. Now, I am going to ask you (Respondent: [CYNAMF CYNAML]) some questions about feelings you may have had over the PAST 30 days. Please answer using one of the following choices: All of the time, most of the time, some of the time, a little of the time, none of the time. In the past 30 days, about how often did you feel...
So sad nothing could cheer you up?

| 1. All of the time | 2. Most of the time | 3. Some of the time | 4. A little of the time | 5. None of the time |

H59B. (In the past 30 days, about how often did you feel...)
Nervous?
(Would you say all of the time, most of the time, some of the time, a little of the time, or none of the time?)

| 1. All of the time | 2. Most of the time | 3. Some of the time | 4. A little of the time | 5. None of the time |

H59C. (In the past 30 days, about how often did you feel...)
Restless or fidgety?
(Would you say all of the time, most of the time, some of the time, a little of the time, or none of the time?)

| 1. All of the time | 2. Most of the time | 3. Some of the time | 4. A little of the time | 5. None of the time |

H59D. (In the past 30 days, about how often did you feel...)
Hopeless?
(Would you say all of the time, most of the time, some of the time, a little of the time, or none of the time?)

| 1. All of the time | 2. Most of the time | 3. Some of the time | 4. A little of the time | 5. None of the time |

H59E. (In the past 30 days, about how often did you feel...)
That everything was an effort?
(Would you say all of the time, most of the time, some of the time, a little of the time, or none of the time?)

| 1. All of the time | 2. Most of the time | 3. Some of the time | 4. A little of the time | 5. None of the time |

H59F. (In the past 30 days, about how often did you feel...)
Worthless?
(Would you say all of the time, most of the time, some of the time, a little of the time, or none of the time?)

| 1. All of the time | 2. Most of the time | 3. Some of the time | 4. A little of the time | 5. None of the time |

H59G RULE. WHETHER R ENDORSED ONE OR MORE FEELINGS IN PAST 30 DAYS (ANY H59A–H59F=1, 2, 3, 4)

| AT LEAST ONE FEELING ENDORSED | ALL OTHERS | → GO H60
↓

H59G. Thinking about the feelings I just asked you about, altogether, did these feelings occur more often in the past 30 days than is usual for you, less often than is usual, or about the same as usual?

| 1. More often than usual | 2. Less often than usual | 3. About the same | DK/RF |
↓   ↓   GO TO H59J

H59H. Was that a lot more, somewhat, or only a little more often than usual?

| 1. A lot more | 2. Somewhat | 3. A little more |

H59I. Was that a lot less, somewhat, or only a little less often than usual?

| 1. A lot less | 2. Somewhat | 3. A little less |

H59J. How much do these feelings usually interfere with your life or activities – a lot, some, a little, or not at all?

| 1. A lot | 2. Some | 3. A little | 5. Not at all |

H59K. During the past 30 days, how many days out of 30 were you totally unable to work or carry out your normal activities because of these feelings?

| 0 – 29 | 30 | DK/RF |
↓   GO TO H60   ↓

H59L. [*H59K=1 – 29*: Aside from [*H59K=1*: that day / *H59K=2 – 29*: those ([H59K]) days], how many of the remaining days / *H59K=0, DK/RF*: How many days] out of the past 30 were you able to work but had to cut down on what you did because of these feelings?

| 0 – [30 (H59K)] |

H60. Next, I would like to ask about health insurance coverage [*R=FU MEMBER & CYEAR FU COUNT=1*: you / *R=PROXY & CYEAR FU COUNT=1*: HEAD / *ALL OTHERS*: the family] had from [P2YEAR] to the present.
At any time during [P2YEAR] or [PYEAR], was anyone in the family covered by health insurance or some other kind of health care plan, including health insurance obtained through employment, or purchased directly, or through a government program like Medicare and Medicaid that provide medical care or help pay medical bills?

| 1. Yes | 5. No | → GO TO H61DCKPT
↓

H60A. Who was covered?
- ENTER all that apply
- PROBE: Any others?

| 1 – 24. [CYNAMF CYNAML. CYAQRTH. CYFUHU] | *(CYAQSN list of P2YEAR, PYEAR and CYEAR FU Members*:
CYFUHU=FU, FUMI, MO, DEC, MILT, EDUC, HLTH, OTHR)

H61. [CYNAMF CYNAML, CYAQRTH, CYFUHU]

[*F1RST ITERATION*: What type of health insurance plan or health insurance coverage did [you / CYNAMF] have at any time during [P2YEAR] or [PYEAR]? Was it through an employer, private insurance, Medicare, Medi-gap or what? Please tell me about ALL the plans or coverage [you / he / she] had at any time during [P2YEAR] or [PYEAR]. / *ALL OTHERS*: What about [you / CYNAMF]? (What type of health insurance plan or health insurance coverage did [you / CYNAMF] have at any time during [P2YEAR] or [PYEAR]?) (Was it through an employer, private insurance, Medicare, Medi-gap or what?) (Please tell me about ALL the plans or coverage [you / he / she] had at any time during [P2YEAR] or [PYEAR].)]

- ENTER all that apply
- PROBE: Any other plan or coverage at any time during [P2YEAR] or [PYEAR]?
- IF DK: Was it employer provided, private, Medicare, Medi-gap, Medicaid or a state program, military provided such as Tricare, ChampUS or ChampVA, Indian health insurance, another state-sponsored plan, another government-sponsored plan, or some other plan?

1. Employer provided health insurance	2. Private health insurance purchased
3. Medicare | 4. Medi-Gap/Supplemental	5. Medicaid/[STATEMEDPROG]/[SCHIPNAME]
6. Military Health Care/Tricare (Active duty)	7. Tricare/Champus/ChampVA (Dependents, veterans)
8. Indian Health Insurance	
9. Other state-sponsored plan (not Medicaid)	ASK H61SPEC
10. Other government program	
97. Other-specify	

H61 SOFT CHECK. (SUPPRESS=continue, CLOSE/GOTO=H61)
IF MEDICARE OR MEDICAID NOT SELECTED AT H61:
- IWER: READ QUESTION TO VERIFY MEDICARE AND/OR MEDICAID COVERAGE:
  How about [*PYSTATERESIDE≠FC/DK/RF*: [Medicare,] [Medicaid, [STATEMEDPROG] and [SCHIPNAME]] / *ALL OTHERS*: [Medicare and].](Did [you / CYNAMF] have (this / any of these) at any time during [P2YEAR] or [PYEAR]?)
  IF "YES" .... ENTER [Close] or [Goto] to make Medicare / Medicaid selection(s)
  IF "NO", "DK", "RF" .... ENTER [Suppress] to go forward with interview

H61=Other State, Other Government, or Other Plan
H61SPEC. [CYNAMF CYNAML, CYAQRTH, CYFUHU]

Could you tell me a little more about that other [*H61=9*: plan / *H61=10*: program / *H61=97*: plan or program]?
Health Plan(s) Selected:
[H61 selections]

String 100

H61A RULE. WHETHER THIS FU MEMBER IS YOUNGER THAN 19 YEARS OLD (AGEIWDATE<19)

FU MEMBER IS <19 YEARS OLD | ALL OTHERS	→ GO TO H61B
↓	

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H61A. Interviewer Checkpoint:
[CYNAMF CYNAML, CYAQRTH, CYFUHU]
- Is that [STATE SCHIP PROGRAM NAME], the state health insurance plan for uninsured children?
- ENTER Yes or No; ASK R only if you are unclear about the answer
Health Plan(s) Selected:
[H61 selections]

 1. Yes   5. No

H61B. [CYNAMF CYNAML, CYAQRTH, CYFUHU]
For how many months in [P2YEAR] [were / was] [you / he / she] covered?
Health Plan(s) Selected:
[H61 selections]

 0 – 12

H61C. [CYNAMF CYNAML, CYAQRTH, CYFUHU]
For how many months in [PYEAR] [were / was] [you / he / she] covered?
Health Plan(s) Selected:
[H61 selections]

 0 – 12

H61C RULE. WHETHER P2YEAR/PYEAR INSURANCE ENDORSED FOR MORE FU MEMBERS (H60A)

 MORE FU MEMBERS → REPEAT H61–H61C; MAX=24; ALL OTHERS
↓   THEN GO TO H61DCKPT   ↓
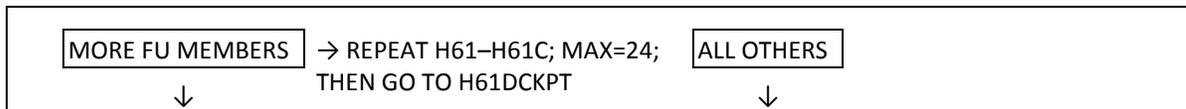
H61DCKPT. CAI CHECKPOINT: WHETHER THIS PERSON IS CURRENTLY IN FU (CYFUHU=1, 4)

 1. FU MEMBER CURRENTLY IN FU   5. ALL OTHERS → GO TO NEXT FU MEMBER;
↓   THEN GO TO H62 RULE
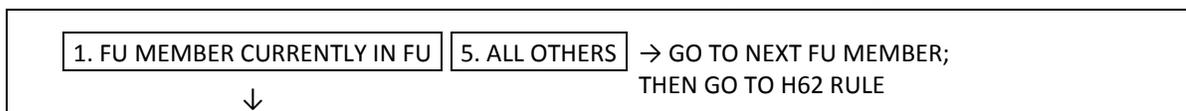
H61DAQSN. AQSN OF FU MEMBER

H61D. [CYNAMF CYNAML, CYAQRTH, CYFUHU]
[*CYEAR FU COUNT>1 & FIRST ITERATION*: Next, please think about what kind of health insurance [*R=FU MEMBER*: your / *R=PROXY*: the] family has <u>now</u>. I'll ask about each person separately, starting with [you / HEAD]. [Do / Does] [you / CYNAMF] have health insurance or health care coverage **now**? / *ALL OTHERS*: [Do / Does] [you / CYNAMF] have health insurance or health care coverage **now**?]

 1. Yes   5. No → GO TO H61H RULE
↓

H61E. [CYNAMF CYNAML, CYAQRTH, CYFUHU]
What kind of health insurance or health care coverage ([do / does] [you / CYNAMF] have **now**)?
- ENTER all that apply
- PROBE: Any others?

| 1. Employer provided health insurance | ASK H61F |

| 2. Private health insurance purchased | ASK H61G |

| 3. Medicare | 4. Medi-Gap/Supplemental | 5. Medicaid/[STATEMEDPROG]/[SCHIPNAME] |

| 6. Military Health Care/Tricare (Active duty) | 7. Tricare/Champus/ChampVA (Dependents, veterans) |

| 8. Indian Health Insurance |

| 9. Other state-sponsored plan (not Medicaid) | ASK H61ESPEC |

| 10. Other government program |

| 97. Other-specify |

H61E=Other State, Other Government, or Other Plan
H61ESPEC. [CYNAMF CYNAML, CYAQRTH, CYFUHU]
Could you tell me a little more about that other [*H61E=9*: plan */ H61E=10*: program */ H61E=97*: plan or program]?
Health Plan(s) Selected:
[H61E selections]

| String 100 |

H61E=Employer Provided Health Insurance
H61F. [CYNAMF CYNAML, CYAQRTH, CYFUHU]
Whose employer provides [your / CYNAMF's] health insurance?
- ENTER all that apply
- PROBE: Any others?
Health Plan(s) Selected:
[H61E selections]

| 1 – 24. [CYNAMF CYNAML, CYAQRTH, CYFUHU] | *(CYAQSN list of CYEAR FU Members*: *CYFUHU=FU, FUMI)* |

| 25. Parent of [FU MEMBER], outside of FU |

| 26. Other person outside of FU-specify | → H61FSPEC. Specify |

H61E= Private Health Insurance
H61G. [CYNAMF CYNAML, CYAQRTH, CYFUHU]
Who is the policy holder on [your / CYNAMF's] private health insurance?
- ENTER all that apply
- PROBE: Any others?
- IF needed: The policy holder is the person who purchased the insurance; other family members who are covered are called dependents.
Health Plan(s) Selected:
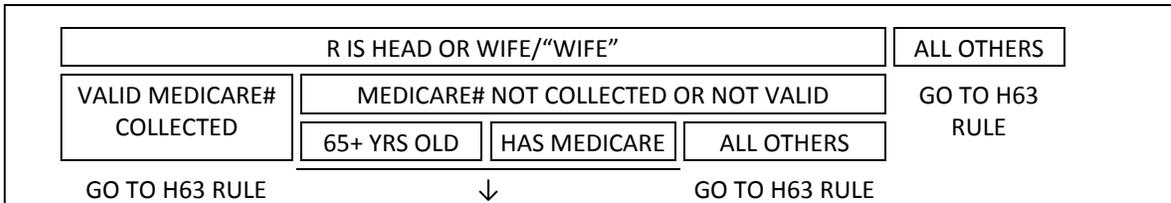[H61E selections]

| 1 – 24. [CYNAMF CYNAML, CYAQRTH, CYFUHU] | *(CYAQSN list of CYEAR FU Members*: *CYFUHU=FU, FUMI)* |

| 25. Parent of [FU MEMBER], outside of FU |

| 26. Other person outside of FU-specify | → H61GSPEC. Specify (String 100) |

H61H RULE. WHETHER THERE ARE MORE CURRENT FU MEMBERS

MORE FU MEMBERS	→ REPEAT H61DCKPT–H61G; MAX=24; THEN GO TO H62 RULE	ALL OTHERS ↓
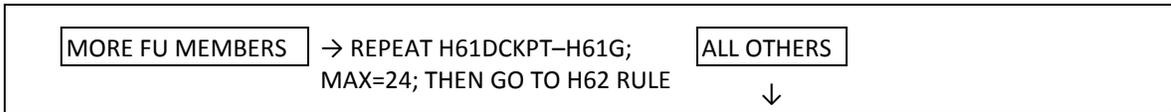
H62 RULE. WHETHER RESPONDENT IS HEAD/WIFE/"WIFE" (RESPONDENT=1, 2, 3); WHETHER A VALID MEDICARE# ALREADY COLLECTED FOR R IN A PREVIOUS WAVE (MEDICARENUM=1); WHETHER R IS AGE 65 OR OLDER (AGEIWDATE≥65) OR IS COVERED BY MEDICARE (H61=3 OR H61E=3)

R IS HEAD OR WIFE/"WIFE"			ALL OTHERS
VALID MEDICARE# COLLECTED	MEDICARE# NOT COLLECTED OR NOT VALID		GO TO H63 RULE
	65+ YRS OLD ‖ HAS MEDICARE	ALL OTHERS	
GO TO H63 RULE	↓	GO TO H63 RULE	

H62A. We would like to learn more about people's health and how health care is used. The best place to get this information is Medicare. We are therefore asking FES families to let us access these records. [*NO CHRONIC CONDITIONS ENDORSED (H5)*: Even if you don't have any health conditions, it is important for statistical purposes to get this information from Medicare.]
Under the Privacy Act of 1974, providing your number is a voluntary decision. The benefits you may be receiving under Medicare will not be affected in any way by your decision.
Could you tell me your Medicare number for this purpose?

| 1. Yes | 5. No | → GO TO H63 RULE
↓

H62B. Is that a Medicare Claim number or a Railroad Retirement Board Claim number?

| 1. Medicare Claim Number | 2. Railroad Retirement | DK/RF | → GO TO H63 RULE
           ↓   ↓

H62C. What is your complete Medicare number, including the letters or number at the end?
- ENTER the 9-digit Medicare number, then any letter(s) and number(s) at the end

1	2	3	–	4	5	–
6	7	8	9	–
A	1/B	2/C

H62D. Is that a 9-digit or 6-digit number?

| 1. 9-digit | 2. 6-digit |
| ↓ | ↓ |

H62E. What is your complete Railroad Retirement number including the letter(s) at the beginning?
- ENTER up to 3 letter(s) at the beginning and then the 9-digit number
- If there are less than 3 letter(s), press the space bar to enter blank(s), then ENTER the letter(s)

| A | B | C | – | 1 | 2 | 3 | – |
| 4 | 5 | – | 6 | 7 | 8 | 9 |

H62F. What is your complete Railroad Retirement number including the letter(s) at the beginning?
- ENTER up to 3 letter(s) at the beginning and then the 6-digit number
- If there are less than 3 letter(s), press the space bar to enter blank(s), then ENTER the letter(s)

| A | B | C | – |
| 1 | 2 | 3 | 4 | 5 | 6 |

H63 RULE. WHETHER ANY FU MEMBER COVERED BY HEALTH INSURANCE P2YEAR OR PYEAR (H60=1)

| AT LEAST ONE FU MEMBER HAD HEALTH INSURANCE | ALL OTHERS | → GO TO H64 |

↓

H63. These next questions are about health care expenditures that [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: and your family] / *R=PROXY*: they] may have had during [P2YEAR] and [PYEAR]. [*R=FU MEMBER*: When I refer to "you" or "you and your family" I mean you and the persons living with you as family during [P2YEAR] and [PYEAR]. / *R=PROXY*: When I refer to "the family" I mean everyone in the family living there during [P2YEAR] and [PYEAR].] Altogether, how much were the health insurance premiums that [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: and your family] / *R=PROXY*: they] paid in [P2YEAR] and [PYEAR] combined for (all of) the health insurance or health care coverage(s) you just mentioned? Please only include amounts that [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: and your family] / *R=PROXY*: they] paid, either directly or through automatic deductions from pay; do not include amounts paid by someone outside of [*R=FU MEMBER*: your / *R=PROXY*: their] family.

$ 1 – 999,997 → GO TO H64   DK/RF

↓

H63A. Were they $2,500 or more?

1. Yes   5. No   DK/RF   → GO TO H64

↓   ↓

H63B. $5,000 or more?   H63C. $1,000 or more?

1. Yes   5. No   DK/RF   1. Yes   5. No   DK/RF

GO TO H64   GO TO H64

H64. [*H60=NO, DK/RF*: These next questions are about health care expenditures that [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: and your family] / *R=PROXY*: they] may have had during [P2YEAR] and [PYEAR]. [*R=FU MEMBER*: When I refer to "you" or "you and your family" I mean you and the persons living with you as family during [P2YEAR] and [PYEAR]. / *R=PROXY*: When I refer to "the family" I mean everyone in the family living there during [P2YEAR] and [PYEAR].]
About how much did [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: and your family] / *R=PROXY*: they] pay out-of-pocket for nursing home and hospital bills in [P2YEAR] and [PYEAR] combined?

$ 1 – 999,997 → GO TO H70   DK/RF

↓

H65. Would it amount to $1,000 or more?

1. Yes   5. No   DK/RF

↓   ↓

H66. $2,000 or more?   H69. $500 or more?

1. Yes   5. No   DK/RF   1. Yes   5. No   DK/RF

↓   GO TO H70   GO TO H70

H67. $8,000 or more?

1. Yes   5. No   DK/RF

↓   GO TO H70

H68. $25,000 or more?

1. Yes   5. No   DK/RF

GO TO H70

H70. About how much did [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: and your family] / *R=PROXY*: they] pay out-of-pocket for doctor, outpatient surgery, and dental bills in [P2YEAR] and [PYEAR] combined?

$ 1 – 999,997 → GO TO H76   DK/RF
↓

H71. Would it amount to $1,000 or more?

1. Yes   5. No   DK/RF → GO TO H76
↓   ↓

H72. $2,500 or more?   H74. $500 or more?

1. Yes   5. No   DK/RF   1. Yes   5. No   DK/RF → GO TO H76
↓   GO TO H76   GO TO H76   ↓

H73. $10,000 or more?   H75. $250 or more?

1. Yes   5. No   DK/RF   1. Yes   5. No   DK/RF
GO TO H76   GO TO H76

H76. About how much did [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: and your family] / *R=PROXY*: they] pay out-of-pocket for prescriptions, in-home medical care, special facilities, and other services in [P2YEAR] and [PYEAR] combined?

$ 1 – 999,997 → GO TO H82   DK/RF
↓

H77. Would it amount to $500 or more?

1. Yes   5. No   DK/RF → GO TO H82
↓   ↓

H78. $2,500 or more?   H81. $200 or more?

1. Yes   5. No   DK/RF   1. Yes   5. No   DK/RF
↓   GO TO H82   GO TO H82

H79. $10,000 or more?

1. Yes   5. No   DK/RF
GO TO H82

H82. Could you give me your best estimate of the total cost of all medical care for [*R=FU MEMBER*: you [*CYEAR FU COUNT>1*: and your family living there] / *R=PROXY*: them] in [P2YEAR] and [PYEAR] combined? That is, the total of your out-of-pocket costs you just gave me, plus the costs covered by Medicare, Medicaid, or other health insurance?

- IF necessary: The costs we talked about were for hospital and nursing home stays, doctor and clinic visits, outpatient surgery, dental visits, prescriptions, and in-home medical care.

$ 1 – 99.999.997 → GO TO SECTION J   DK/RF

↓

H83. Would it amount to $10,000 or more?

1. Yes   5. No   DK/RF   → GO TO SECTION J

↓   ↓

H84. $25,000 or more?   H86. $3,000 or more?

1. Yes   5. No   DK/RF   1. Yes   5. No   DK/RF

↓   GO TO SECTION J   GO TO SECTION J   ↓   GO TO SECTION J

H85. $75,000 or more?   H87. $1,000 or more?

1. Yes   5. No   DK/RF   1. Yes   5. No   DK/RF

GO TO SECTION J   GO TO SECTION J

Section J: Marriage and Children

THE BIG TRICK HERE IS TO PROPERLY IDENTIFY PEOPLE WHOSE MARRIAGE AND KID HISTORIES SHOULD BE ASKED. THE J1 RULE BELOW IDENTIFIES 3 TYPES OF INDIVIDUALS WHO QUALIFY FOR AT LEAST SOME QUESTIONS IN SECTION J.
THERE ARE TWO MAJOR COMPLICATIONS IN SECTION J. ONE IS THE CONCEPT OF **UPDATES VS. FULL SHOTS**. HEADS/WIVES/"WIVES" WHO WERE HEADS/WIVES/"WIVES" LAST YEAR ARE ASKED UPDATES ABOUT THE "PROGRESS" OF THEIR MARRIAGES AND BIRTHS / ADOPTIONS OF ADDITIONAL KIDS. THE CONCEPT OF H / W / "W" THIS YEAR AND LAST INCLUDES LAST YEAR'S WIFE WHO IS NOW A SINGLE FEMALE HEAD, A "WIFE" WHO MARRIES THE HEAD AND BECOMES A LEGAL WIFE, A HEAD WHO SPLITS OFF FROM A WIFE, ETC. THE POINT IS THAT THIS CURRENT HEAD/WIFE/"WIFE" WAS IN A RESPONSE FU IN THE LAST WAVE – HAVING BEEN IN AN INSTITUTION DOESN'T COUNT – WITH ONE OF THOSE THREE RTH'S. FULL SHOTS ARE ASKED ABOUT PEOPLE WHO ARE NEW TO HEAD-, WIFE-, OR "WIFE"-HOOD AND ARE ALSO ASKED FOR OFUMS.
THE SECOND MAJOR COMPLICATION CENTERS AROUND WHAT'S ASKED OF A STABLY AND LEGALLY MARRIED, CORESIDENT COUPLE WHO WAS RESPONSE IN THE PRIOR WAVE. THE COUPLE IS NOT ASKED ANY MARRIAGE INFORMATION BUT IS ASKED KID UPDATE INFO AS A UNIT ("you and your wife"). THIS IS A SPECIALIZED SUBSET OF THOSE WHO FIT INTO COMPLICATION #1 ABOVE.
FURTHER BUT COMPARATIVELY MINOR ADJUSTMENTS FOR ASKING FAMILY HISTORY ARE MADE BASED ON GENDER AND AGE. ONLY THOSE OFUMS AGED 12–44 GET SECTION J, AND FEMALE HEADS/WIVES/"WIVES" WHO QUALIFY FOR UPDATES ARE ASKED ABOUT KIDS ONLY IF THEY ARE AGED 44 OR UNDER.

J1CKPT. SECTION J QUALIFIER

GROUP 1

SAME HEAD+WIFE COUPLE AS LAST WAVE. <u>REINT, S/O</u>. FU HAS AT LEAST 2 PEOPLE AND BOTH ARE PYFUHU 1 & CYFUHU 1, 4. ONE PERSON IS CYAQRTH 101 & PYAQRTH 101; THE OTHER PERSON IS CYAQRTH 202 & PYAQRTH 202.

HEAD + WIFE & WIFE IS 12–44 YRS OLD **1. A (BOTH HD & WF)**	HEAD + WIFE & WIFE IS 45+ YRS OLD **2. ANoJ (BOTH HD & WF)**
ASK J1A & KIDS FOR THIS COUPLE	NO SECTION J FOR THIS COUPLE

GROUP 2

H/W/"W" WAS H/W/"W" IN ANY COMBINATION LAST WAVE. <u>REINT, S/O</u>. H/W/"W" IS PYAQRTH 101 – 222 & CYAQRTH 101 – 222 & PYFUHU 1 & CYFUHU 1, 4.			ALL 0THERS	
MALE HD **3. B1**	FEMALE H/W/"W" 12 – 44 YRS OLD **4. B2**	FEMALE H/W/"W" 45+ YRS OLD **5. B3**	CYFUHU 1, 4	CYFUHU 6 – 12 **97. ALL OTHERS**
ASK J1A, MARR UPDATE (IF MARR STAT≠NEVMARR) & KIDS		ASK J1A & MARR UPDATE (IF MARR STAT≠NEVMARR)	↓	NO SECTION J FOR THIS PERSON

GROUP 2, CONTINUED							
NEW OR PY INST MALE HEAD IS CYAQRTH 101 & PYAQRTH NULL or >222 & CYFUHU 1, 4 & PYFUHU NULL or INST.		**NEW OR PY INST FEMALE H/W/"W"** IS CYAQRTH 102 – 222 & PYAQRTH NULL or >222 & CYFUHU 1, 4 & PYFUHU NULL or INST.		**OFUM** CYAQRTH > 222			
				12–44 YRS OLD		45+ YRS OLD	
REINT, SO **6. C1a**	RECON, RECSO **11. C2a**	REINT, SO **7. C1b**	RECON, RECSO **12. C2b**	REINT, SO **9. C1d**	RECON, RECSO **14. C2d**	REINT, SO **10. C1NoJ**	RECON, RECSO **15. C2NoJ**
ASK J1A, ALL MARRS (IF MARR STAT≠NEVMARR) & KIDS				ASK J1A, ALL MARRS (IF MARR STAT≠NEVMARR) & KIDS		NO SECTION J FOR THIS PERSON	

J1A ASKED FOR FIRST ITERATION OF SECTION J ONLY

J1A. Now I have some questions about marriage and children.
- ENTER [1] to continue

1. Continue

Marriage Update

J2. AQSN OF FU MEMBER

J3CKPT. CAI CHECKPOINT: WHETHER FU MEMBER IS MARRIED (MARITAL=1), NEVER MARRIED (MARITAL=2), WIDOWED (MARITAL=3), DIVORCED (MARITAL=4), SEPARATED (MARITAL=5)

1. WIDOWED ↓	2. SEPARATED, MARRIED "WIFE" (CYAQRTH=222)	3. DIVORCED, MARRIAGE ANNULLED	4. MARRIED HEAD, WIFE, OR OFUM (CYAQRTH≠222)	5. NEVER MARRIED
	GO TO J6MO	GO TO J5MO	GO TO J7MO	GO TO J27CKPT

J4MO. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
In what month and year [were / was] [you / HEAD / WIFE/"WIFE"] widowed?
- SELECT Month and [Enter] to go to next screen for year

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December
21. Winter	22. Spring	23. Summer	24. Fall		

J4YR. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
The month entered is: [J4MO]
- ENTER the year below

1901– [CYEAR]   Actual year
9996   [P2YEAR] – [CYEAR], DK which year
9997   Before [P2YEAR], DK exact year

1901 – [P3YEAR]	[P2YEAR] – [CYEAR]	9996. [P2YEAR] – [CYEAR], DK Which Year	9997. Before [P2YEAR], DK Exact Year
GO TO J27CKPT		GO TO J7MO	GO TO J27CKPT

J5MO. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
In what month and year did [your / HEAD's / WIFE's/"WIFE's"] [divorce / annulment] become final?
- SELECT Month and [Enter] to go to next screen for year

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December
21. Winter	22. Spring	23. Summer	24. Fall		

J5YR. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]

    The month entered is: [J5MO]

- ENTER the year below

1901– [CYEAR]   Actual year

9996   [P2YEAR] – [CYEAR], DK which year

9997   Before [P2YEAR], DK exact year

1901 – [P3YEAR]	[P2YEAR] – [CYEAR]	9996. [P2YEAR] – [CYEAR], DK Which Year	9997. Before [P2YEAR], DK Exact Year
GO TO J27CKPT			

           ↓   GO TO J27CKPT

J6MO. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]

    In what month and year did [you and your wife / you and your husband / HEAD and his wife / WIFE/"WIFE" and her husband] stop living together?

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

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December
21. Winter	22. Spring	23. Summer	24. Fall		

J6YR. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]

    The month entered is: [J6MO]

- ENTER the year below

1901– [CYEAR]   Actual year

9996   [P2YEAR] – [CYEAR], DK which year

9997   Before [P2YEAR], DK exact year

1901 – [P3YEAR]	[P2YEAR] – [CYEAR]	9996. [P2YEAR] – [CYEAR], DK Which Year	9997. Before [P2YEAR], DK Exact Year
GO TO J27CKPT			

           ↓   GO TO J27CKPT

J7MO. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]

    [Please tell me again, in / In] what month and year did [you / HEAD / you and your wife / you and HEAD / HEAD and his wife / WIFE/"WIFE" and her husband/ you and your husband] [last / (last)] get married?

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

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December
21. Winter	22. Spring	23. Summer	24. Fall		

J7YR. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]

    The month entered is: [J7MO]

- ENTER the year below

1901– [CYEAR]   Actual year

9996   [P2YEAR] – [CYEAR], DK which year

9997   Before [P2YEAR], DK exact year

1901 – [P3YEAR]	[P2YEAR] – [CYEAR]	9996. [P2YEAR] – [CYEAR], DK Which Year	9997. Before [P2YEAR], DK Exact Year
GO TO J27CKPT			

           ↓   GO TO J27CKPT

J8. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]

    What (was / is) [your wife's / his wife's / your husband's / her husband's] name?

- ACCEPT any name – do not probe.

String 25

J9. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
Before that, [were / was] [you / he / she] widowed, divorced, or had [you / he / she] never been married?

| 2. Never married | 3. Widowed | 4. Divorced, marriage annulled | 7. Other-specify | → J9SPEC. Specify (String 100) |

GO TO J27CKPT   ↓   GO TO J11MO   GO TO J12MO

J10MO. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
In what month and year [were / was] [you / he / she] widowed?
- SELECT Month and [Enter] to go to next screen for year

1. January	2. February	3. March	4. April
5. May	6. June	7. July	8. August
9. September	10. October	11. November	12. December
21. Winter	22. Spring	23. Summer	24. Fall

J10YR. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
The month entered is: [J10MO]
- ENTER the year below

1901– [CYEAR]   Actual year
9996   [P2YEAR] – [CYEAR], DK which year
9997   Before [P2YEAR], DK exact year

| 1901 – [P3YEAR] | [P2YEAR] – [CYEAR] | 9996. [P2YEAR] – [CYEAR], DK Which Year | 9997. Before [P2YEAR], DK Exact Year |

GO TO J27CKPT

J11MO. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
In what month and year did [your / his / her] (divorce / annulment) become final?
- SELECT Month and [Enter] to go to next screen for year

1. January	2. February	3. March	4. April	5. May
6. June	7. July	8. August	9. September	10. October
11. November	12. December	21. Winter	22. Spring	23. Summer	24. Fall

J11YR. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
The month entered is: [J11MO]
- ENTER the year below

1901– [CYEAR]   Actual year
9996   [P2YEAR] – [CYEAR], DK which year
9997   Before [P2YEAR], DK exact year

| 1901 – [P3YEAR] | [P2YEAR] – [CYEAR] | 9996. [P2YEAR] – [CYEAR], DK Which Year | 9997. Before [P2YEAR], DK Exact Year |

J12MO. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
In what month and year did [you / they] stop living together?
- SELECT Month and [Enter] to go to next screen for year

1. January	2. February	3. March	4. April	5. May
6. June	7. July	8. August	9. September	10. October
11. November	12. December	21. Winter	22. Spring	23. Summer	24. Fall

J12YR. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
> The month entered is: [J12MO]
> - ENTER the year below
> 1901– [CYEAR]   Actual year
> 9996   [P2YEAR] – [CYEAR], DK which year
> 9997   Before [P2YEAR], DK exact year

1901 – [P3YEAR]	[P2YEAR] – [CYEAR]	9996. [P2YEAR] – [CYEAR], DK Which Year	9997. Before [P2YEAR], DK Exact Year

GO TO J27CKPT

End Marriage Update

All Marriages
J12A. AQSN OF FU MEMBER

J13CKPT. CAI CHECKPOINT: WHETHER FU MEMBER NEVER MARRIED (MARITAL=2)

1. NEVER MARRIED	→ GO TO J27CKPT	5. ALL OTHERS
		↓

J14. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
> [*H/W/"W"*: (Now) I'd like to ask about [your / HEAD's / WIFE's/"WIFE's"] family history. / *1st OFUM*: Now let's talk about the other members of the family. / *ALL OTHERS*: (Now let's talk about the other members of the family.)] Altogether, how many times [have / has] [you / HEAD / WIFE/"WIFE" / CYNAMF] been married?

1	→ GO TO J21MO	2– 15	DK/RF	→ GO TO J21MO

↓

J15MO. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
> In what month and year did [you / he / she] get married for the first time?
> - SELECT Month and [Enter] to go to next screen for year

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December
21. Winter	22. Spring	23. Summer	24. Fall		

J15YR. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
> The month entered is: [J15MO]
> - ENTER the year below
> 1901– [CYEAR]   Actual year
> 9996   [P2YEAR] – [CYEAR], DK which year
> 9997   Before [P2YEAR], DK exact year

1901 – [P3YEAR]	[P2YEAR] – [CYEAR]	9996. [P2YEAR] – [CYEAR], DK Which Year	9997. Before [P2YEAR], DK Exact Year

J16. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
> What was [your / his / her] first [wife's / husband's] name?
> - ACCEPT any name – do not probe

String 25

J17. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
      Did that marriage end in widowhood, divorce, or what?

3. Widowhood	4. Divorce, annullment	7. Other-specify	→ J17SPEC. Specify (String 100)
↓	GO TO J19MO		GO TO J20MO

J18MO. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
      In what month and year [were / was] [you / he / she] widowed?
- SELECT Month and [Enter] to go to next screen for year

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December
21. Winter	22. Spring	23. Summer	24. Fall		

J18YR. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
      The month entered is: [J18MO]
- ENTER the year below

1901– [CYEAR]   Actual year
9996   [P2YEAR] – [CYEAR], DK which year
9997   Before [P2YEAR], DK exact year

1901 – [P3YEAR]	[P2YEAR] – [CYEAR]	9996. [P2YEAR] – [CYEAR], DK Which Year	9997. Before [P2YEAR], DK Exact Year

GO TO J21MO

J19MO. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
      In what month and year did [your / his / her] (divorce / annulment) become final?
- SELECT Month and [Enter] to go to next screen for year

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December
21. Winter	22. Spring	23. Summer	24. Fall		

J19YR. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
      The month entered is: [J19MO]
- ENTER the year below

1901– [CYEAR]   Actual year
9996   [P2YEAR] – [CYEAR], DK which year
9997   Before [P2YEAR], DK exact year

1901 – [P3YEAR]	[P2YEAR] – [CYEAR]	9996. [P2YEAR] – [CYEAR], DK Which Year	9997. Before [P2YEAR], DK Exact Year

J20MO. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
      In what month and year did [you / they] stop living together?
- SELECT Month and [Enter] to go to next screen for year

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December
21. Winter	22. Spring	23. Summer	24. Fall		

J20YR. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
    The month entered is: [J20MO]
- ENTER the year below

1901– [CYEAR]   Actual year
9996   [P2YEAR] – [CYEAR], DK which year
9997   Before [P2YEAR], DK exact year

1901 – [P3YEAR]	[P2YEAR] – [CYEAR]	9996. [P2YEAR] – [CYEAR], DK Which Year	9997. Before [P2YEAR], DK Exact Year

J21MO. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
In what month and year did [you / he / she] (last) get married?
- SELECT Month and [Enter] to go to next screen for year

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December
21. Winter	22. Spring	23. Summer	24. Fall		

J21YR. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
    The month entered is: [J21MO]
- ENTER the year below

1901– [CYEAR]   Actual year
9996   [P2YEAR] – [CYEAR], DK which year
9997   Before [P2YEAR], DK exact year

1901 – [P3YEAR]	[P2YEAR] – [CYEAR]	9996. [P2YEAR] – [CYEAR], DK Which Year	9997. Before [P2YEAR], DK Exact Year

J22. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
What (was / is) [your wife's / his wife's / your husband's / her husband's] name?
- ACCEPT any name – do not probe

String 25

J23CKPT. CAI CHECKPOINT: WHETHER FU MEMBER IS MARRIED (MARITAL=1), NEVER MARRIED (MARITAL=2), WIDOWED (MARITAL=3), DIVORCED (MARITAL=4), SEPARATED (MARITAL=5)

1. WIDOWED	2. SEPARATED, MARRIED "WIFE" (CYAQRTH=222)	3. DIVORCED OR MARRIAGE ANNULLED	4. MARRIED HEAD, WIFE, OR OFUM (CYAQRTH≠222)
↓			
	GO TO J26MO	GO TO J25MO	GO TO J7MO

J24. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
In what month and year [were / was] [you / he / she] widowed?
- SELECT Month and [Enter] to go to next screen for year

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December
21. Winter	22. Spring	23. Summer	24. Fall		

J24YR. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
The month entered is: [J24MO]
- ENTER the year below
1901– [CYEAR]   Actual year
9996   [P2YEAR] – [CYEAR], DK which year
9997   Before [P2YEAR], DK exact year

1901 – [P3YEAR]	[P2YEAR] – [CYEAR]	9996. [P2YEAR] – [CYEAR], DK Which Year	9997. Before [P2YEAR], DK Exact Year

GO TO J27CKPT

J25MO. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
In what month and year did [your / his / her] (divorce / annulment) become final?
- SELECT Month and [Enter] to go to next screen for year

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December
21. Winter	22. Spring	23. Summer	24. Fall		

J25YR. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
The month entered is: [J25MO]
- ENTER the year below
1901– [CYEAR]   Actual year
9996   [P2YEAR] – [CYEAR], DK which year
9997   Before [P2YEAR], DK exact year

1901 – [P3YEAR]	[P2YEAR] – [CYEAR]	9996. [P2YEAR] – [CYEAR], DK Which Year	9997. Before [P2YEAR], DK Exact Year

J26MO. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
In what month and year did [you / they] stop living together?
- SELECT Month and [Enter] to go to next screen for year

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December
21. Winter	22. Spring	23. Summer	24. Fall		

J26YR. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
The month entered is: [J26MO]
- ENTER the year below
1901– [CYEAR]   Actual year
9996   [P2YEAR] – [CYEAR], DK which year
9997   Before [P2YEAR], DK exact year

1901 – [P3YEAR]	[P2YEAR] – [CYEAR]	9996. [P2YEAR] – [CYEAR], DK Which Year	9997. Before [P2YEAR], DK Exact Year

End All Marriages

Own Kids

J27CKPT. CAI CHECKPOINT: WHETHER FU MEMBER IS ELIGIBLE FOR OWN KIDS SECTION; TYPE A (J1CKPT=1), TYPE B1, B2 (J1CKPT=3–4), TYPE C1 (J1CKPT=6–9), TYPE C2 (J1CKPT=11–14)

1. TYPE A	2. TYPES B1, B2	TYPE B3	3. TYPES C1A–D, TYPES C2A–D
↓		NO MORE SECTION J	↓

J28. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]

[*1st ITERATION*: We are updating the information we collected in [P2YEAR].] [Have / Has] [you and your wife had / you and HEAD had / HEAD and WIFE had / you fathered / HEAD fathered / you given birth to / FEMALE HEAD /WIFE/"WIFE" given birth to] any children since January [P2YEAR]?

- DO NOT count stillbirths, stepchildren, or adopted children

1. Yes　5. No → GO TO J32CKPT

↓

J29. How many is that? (Since January [P2YEAR]?

1 – 20
↓

J30. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]

[Now let's talk about the other members of the family. / (Now, we would like to ask about births of children.)]
How many children [have / has] [you ever fathered / you yourself ever given birth to / CYNAMF ever fathered / CYNAMF ever given birth to]?

- DO NOT count stillbirths, stepchildren, or adopted children

0　→ GO TO J32CKPT　1 – 20
↓

J31. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]

What is the [first / next] child's name?

String 25

OS1 RULE. NUMBER OF CHILDREN LISTED (J29, J30)

MORE THAN ONE CHILD → REPEAT J31; MAX=20; THEN GO TO OS1　ONLY ONE CHILD ↓

OS1. [J31] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]

Let's talk about [J31]. (We can't always tell from a name. Is that a male or a female?)

1. Male　2. Female

OS2MO. [J31] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]

In what month and year was [J31] born?

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

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December
21. Winter	22. Spring	23. Summer	24. Fall		

OS2YR. [J31] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
The month entered is: [OS2MO]
- ENTER the year below
1901– [CYEAR]   Actual year
9996   [P2YEAR] – [CYEAR], DK which year
9997   Before [P2YEAR], DK exact year

1901 – [P3YEAR]	[P2YEAR] – [CYEAR]	9996. [P2YEAR] – [CYEAR], DK Which Year	9997. Before [P2YEAR], DK Exact Year
GO TO OS4TOWN		↓	GO TO OS4TOWN

OS3LBS. [J31] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
How much did [he / she] weigh at birth?
- ENTER weight in pounds first, then go to next screen for ounces

0 – 20

OS3OZ. [J31] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
- The weight in pounds entered is: [OS3LBS]
- ENTER the ounces

0 – 15

OS4TOWN. [J31] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
Where was [he / she] born?
- ENTER Town and go to next screen for State

String 25

OS4STATE. [J31] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
What is the State?
[OS4TOWN]
- Start typing the name of the State to bring up the look-up list
- For foreign country birth, ENTER [FOR] to select "Foreign Country" from the state list

String 30; State Lookup List   → GO TO OS5   Foreign Country
↓

OS4COUNTRY. [J31] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
What is the Country?
[OS4TOWN], [OS4STATE]
- Start typing the name of the Foreign Country to bring up the look-up list

String 25; Country Lookup List

OS5. [J31] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
Is [J31] living with you now, away with [his / her] [father / mother], with some other relative, [has he/she set up a separate household], or what?

1. Living in FU now	2. Living with father elsewhere	3. Living with mother elsewhere
4. Living with other relative elsewhere	5. Set up a separate household	6. Deceased
7. Other-specify	→ OS5SPEC. Specify (String 100)	↓

GO TO OS7

OS6MO. [J31] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
In what month and year did [he / she] die?
- SELECT Month and [Enter] to go to next screen for year

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December
21. Winter	22. Spring	23. Summer	24. Fall		

OS6YR. [J31] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
The month entered is: [OS6MO]
- ENTER the year below

1901– [CYEAR]   Actual year
9996   [P2YEAR] – [CYEAR], DK which year
9997   Before [P2YEAR], DK exact year

| 1901 – [P3YEAR] | [P2YEAR] – [CYEAR] | 9996. [P2YEAR] – [CYEAR], DK Which Year | 9997. Before [P2YEAR], DK Exact Year |

GO TO OS10 RULE

OS7. [J31] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
Is [he / she] Spanish, Hispanic, or Latino? That is, Mexican, Mexican American, Chicano, Puerto Rican, Cuban, or other Spanish?

| 0. Not Spanish/Hispanic | 1. Mexican | 2. Mexican American | 3. Chicano | 4. Puerto Rican |
| 5. Cuban | 7. Other-specify | → OS7SPEC. Specify (String 100) | | |

OS8. [J31] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
What is [his / her] race? Is [he / she] white, black, American Indian, Alaska Native, Asian, Native Hawaiian or Other Pacific Islander?
- ENTER all that apply
- PROBE: Any others?

| 1. White | 2. Black, African-American, or Negro | 3. American Indian or Alaska Native | 4. Asian |
| 5. Native Hawaiian or Pacific Islander | | 7. Other-specify | → OS8SPEC. Specify (String 100) |

OS9. [J31] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
What is [her / his] ancestry or ethnic origin? From what country or part of the world did [her / his] ancestors come from?
- PROBE: Is there a second? (What is it?)
- DO NOT ACCEPT a State in the United States

String 200

OS10 RULE. WHETHER MORE CHILDREN LISTED AT J31

| MORE CHILDREN | → REPEAT OS1–OS9; MAX=24; | ALL OTHERS |
| | THEN GO TO J32CKPT | ↓ |

End Own Kids

Adopted Kids

J32CKPT. CAI CHECKPOINT: WHETHER FU MEMBER IS ELIGIBLE FOR ADOPTED KID SECTION; TYPE A (J1CKPT=1), TYPE B
(J1CKPT=3–4), TYPE C1 (J1CKPT=6–9), TYPE C2 (J1CKPT=11–14)

1. TYPE A	2. TYPES B1, B2	3. TYPES C1, C2: HEAD/WIFE/"WIFE"	4. TYPES C1, C2: OFUM
↓		NO MORE SECTION J	↓

J33. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]	J34. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
[Have / Has] [you or your wife / you or HEAD / HEAD or WIFE/"WIFE" / you / your wife / HEAD / WIFE/"WIFE"] legally adopted any children since January [P2YEAR]? 1. Yes 5. No → GO TO J1END RULE ↓	[Have / Has] [you / your wife / HEAD / WIFE/"WIFE"] ever legally adopted any children]? 1. Yes 5. No → GO TO J1END RULE ↓

J35. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
[*TYPES A, B1–B2*: How many is that? / *TYPES C1A–D, C2A–D*: How many altogether?]

1 – 20

J36. [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
What is the [first / next] child's name?

String 25

AS1 RULE. NUMBER OF CHILDREN LISTED AT J35

MORE THAN ONE CHILD	→ REPEAT J36; MAX=20; THEN GO TO AS1	ONLY ONE CHILD
		↓

AS1. [J36] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
Let's talk about [J36]. (We can't always tell from a name. Is that a male or a female?)

1. Male 2. Female

AS2MO. [J36] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
In what month and year was [J36] born?
• SELECT Month and [Enter] to go to next screen for year

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December
21. Winter	22. Spring	23. Summer	24. Fall		

AS2YR. [J36] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
The month entered is: [AS2MO]
• ENTER the year below
1901– [CYEAR]   Actual year
9996   [P2YEAR] – [CYEAR], DK which year
9997   Before [P2YEAR], DK exact year

1901 – [P3YEAR]	[P2YEAR] – [CYEAR]	9996. [P2YEAR] – [CYEAR], DK Which Year	9997. Before [P2YEAR], DK Exact Year

AS3. [J36] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
What was [his / her] relationship to [you and your wife / you and HEAD/WIFE/"WIFE" / HEAD and WIFE/"WIFE" / you / your wife / HEAD / WIFE/"WIFE"] before the adoption?

96. None			
301. Son	302. Daughter	331. Stepson	332. Stepdaughter
381. Foster son	382. Foster daughter	401. Brother	402. Sister
471. Brother-in-law	472. Sister-in-law	481. Brother of co-habitor	482. Sister of co-habitor
601. Grandson	602. Granddaughter	651. Great-grandson	652. Great-granddaughter
701. Nephew of Head	702. Niece of Head	711. Nephew of Wife	712. Niece of Wife
740. Cousin of Head	750. Cousin of Wife	831. Son of boyfriend/girlfriend	832. Daughter of boyfriend/girlfriend
950. Relative of Head	960. Relative of Wife	970. Relative of co-habitor	

AS4TOWN. [J36] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
Where was [he / she] born?
- ENTER Town and go to next screen for State

String 25

AS4STATE. [J36] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
What is the State?
[AS4TOWN]
- Start typing the name of the State to bring up the look-up list
- For foreign country birth, ENTER [FOR] to select "Foreign Country" from the state list State

String 30; State Lookup List   → GO TO AS5   Foreign Country
↓

AS4COUNTRY. [J36] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
What is the Country?
[AS4TOWN], [AS4STATE]
- Start typing the name of the Foreign Country to bring up the look-up list

String 25; Country Lookup List

AS5. [J36] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
Is [J36] living with you now, away with [his / her] [father / mother], with some other relative, [has he/she set up a separate household], or what?

1. Living in FU now	2. Living with father elsewhere	3. Living with mother elsewhere
4. Living with other relative elsewhere	5. Set up a separate household	6. Deceased

7. Other-specify   → AS5SPEC. Specify (String 100)   ↓
GO TO AS7

AS6MO. [J36] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
In what month and year did [he / she] die?
- SELECT Month and [Enter] to go to next screen for year

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December
21. Winter	22. Spring	23. Summer	24. Fall		

AS6YR. [J36] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
The month entered is: [AS6MO]
- ENTER the year below

1901– [CYEAR]	Actual year
9996	[P2YEAR] – [CYEAR], DK which year
9997	Before [P2YEAR], DK exact year

1901 – [P3YEAR]	[P2YEAR] – [CYEAR]	9996. [P2YEAR] – [CYEAR], DK Which Year	9997. Before [P2YEAR], DK Exact Year

GO TO AS10 RULE

AS7. [J36] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
In order to get an idea of the different races and ethnic groups that participate in the study, I would like to ask you about [his / her] background. Is [he / she] Spanish, Hispanic, or Latino? That is, Mexican, Mexican American, Chicano, Puerto Rican, Cuban, or other Spanish?

| 0. Not Spanish/Hispanic | 1. Mexican | 2. Mexican American | 3. Chicano | 4. Puerto Rican |
| 5. Cuban | 7. Other-specify | → AS7SPEC. Specify (String 100) | | |

AS8. [J36] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
What is [his / her] race? Is [he / she] white, black, American Indian, Alaska Native, Asian, Native Hawaiian or Other Pacific Islander?
- ENTER all that apply
- PROBE: Any others?

| 1. White | 2. Black, African-American, or Negro | 3. American Indian or Alaska Native | 4. Asian |
| 5. Native Hawaiian or Pacific Islander | | 7. Other-specify | → AS8SPEC. Specify (String 100) |

AS9. [J36] CHILD OF: [CYAQRTH, CYNAMF CYNAML, age: AGEIWDATE]
What is [her / his] ancestry or ethnic origin? From what country or part of the world did [her / his] ancestors come from?
- PROBE: Is there a second? (What is it?)
- DO NOT ACCEPT a State in the United States

| String 200 |

AS10 RULE. WHETHER MORE CHILDREN LISTED AT J36

| MORE CHILDREN | → REPEAT AS1–AS9; MAX=24; | ALL OTHERS |
| | THEN GO TO J1END RULE | ↓ |

End Adopted Kids

J1END RULE. WHETHER THERE ARE MORE ELIGIBLE FU MEMBERS

| MORE FU MEMBERS | → REPEAT J1–AS10; MAX=24; | ALL OTHERS |
| | THEN GO TO SECTION KL | GO TO SECTION KL |

Section KL: Background, Education and Religion
Return to TOC

KL1CKPT. CAI CHECKPOINT: WHETHER NEW HEAD/WIFE/"WIFE"/HEAD IN FU
> NEW WIFE/"WIFE": (IWTYPE=REINT AND (CYFUHU=1 & CYAQRTH=202, 222 & PYAQRTH≠202, 222) OR (CYFUHU=4 & CYAQRTH=202, 222)) OR (IWTYPE=SO, RECON, RECSO & CYFUHU=1, 4 & CYAQRTH=202, 222).
> NEW HEAD: (IWTYPE=REINT & (CYFUHU=1 & CYAQRTH=101, 102 & PYAQRTH≠101, 102) OR (CYFUHU=4 & CYAQRTH=101, 102)) OR (IWTYPE=SO, RECON, RECSO & CYFUHU=1, 4 & CYAQRTH=101, 102).

1. NEW WIFE/"WIFE" - LOOP 1	2. NEW HEAD- LOOP 2	3. SAME WIFE/"WIFE"	4. SAME HEAD
↓	↓	GO TO SECTION M	
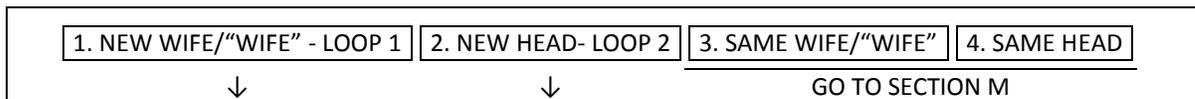
KL2CITY. [CYAQRTH, CYNAMF CYNAML]
> Now I have some questions about [your / your wife's / WIFE's/"WIFE's" / your husband's / HEAD's] family and past experiences. Where was [your / her / his] father born?
> - ACCEPT Father substitute
>
> String 25

KL2STATE. [CYAQRTH, CYNAMF CYNAML]
> (What State is that in?)
> [KL2CITY]
> - Start typing the name of the State to bring up the look-up list
> - IF foreign country, ENTER [FOR] to select "Foreign Country"
>
> String 30; State Lookup List; State → GO TO KL3CITY   Foreign Country   DK/RF → GO TO KL3CITY
>   ↓

> KL2COUNTRY. [CYAQRTH, CYNAMF CYNAML]
> > (What Country is that in?)
> > [KL2CITY], [KL2STATE]
> > - Start typing the name of the Foreign Country to bring up the look-up list
> >
> > String 25; Country Lookup List

KL3CITY. [CYAQRTH, CYNAMF CYNAML]
> Where did [your / her / his] father grow up?
> - Most of the years from ages 6 to 16
>
> String 25

KL3STATE. [CYAQRTH, CYNAMF CYNAML]
> (What State is that in?)
> [KL3CITY]
> - Start typing the name of the State to bring up the look-up list
> - IF foreign country, ENTER [FOR] to select "Foreign Country"
>
> String 30; State Lookup List; State → GO TO KL4   Foreign Country   DK/RF → GO TO KL4
>   ↓

> KL3COUNTRY. [CYAQRTH, CYNAMF CYNAML]
> > (What Country is that in?)
> > [KL3CITY], [KL3STATE]
> > - Start typing the name of the Foreign Country to bring up the look-up list
> >
> > String 25; Country Lookup List

KL4. [CYAQRTH, CYNAMF CYNAML]
Where did [your / her / his] father receive his education — in the United States, outside the United States, or both?

| 1. United States only | 2. Outside U.S. only | 3. Both in U.S. and outside | DK | 5. Had no education | RF |

    ↓   GO TO KL7CKPT   ↓   GO TO KL10

KL5. [CYAQRTH, CYNAMF CYNAML]
How much education did [your / her / his] father complete (in the United States)?

| 1. 0 – 5 grades | → GO TO KL6 |

2. 6 – 8 grades; "Grade School"	3. 9 – 11 grades; "Junior High"
4. 12 grades; "High School"	5. 12 grades plus non-academic training
6. 13 – 14 years; Some college; Associate's Degree	7. 15 – 16 years; College; Bachelor's Degree

| 8. 17 or more years; College; Graduate work; Ph.D, Professional degree | DK | RF |

           GO TO KL7CKPT   ↓   GO TO KL6

KL5 SOFT CHECK FOR KL5=DK:
What is your best estimate, would you say…
- Read code list below

1. 0 – 5 grades,	2. 6 – 8 grades,	3. 9 – 11 grades,	4. 12 grades,
5. 12 grades plus non-academic training,		6. 13 – 14 years or an Associate's Degree,	
7. 15 – 16 years or a Bachelor's Degree,		8. 17 or more years – a graduate degree, Ph.D, or professional degree?	

KL6. [CYAQRTH, CYNAMF CYNAML]
Could he read and write (in English)?

| 1. Yes | 5. No |

KL7CKPT. CAI CHECKPOINT: WHETHER EDUCATED OUTSIDE U.S. (KL4=2, 3)

| 1. EDUCATED OUTSIDE U.S. | 5. ALL OTHERS | → GO TO KL10 |

         ↓

KL8. [CYAQRTH, CYNAMF CYNAML]
How many years of school did he complete outside of the U.S.?

| 1 – 25 |

KL9. [CYAQRTH, CYNAMF CYNAML]
What was the highest degree or certificate he earned outside the U.S.?

| String 100 |

KL10. [CYAQRTH, CYNAMF CYNAML]
What was [your / her / his] father's usual occupation when [you / she / he] [were / was] growing up? What kind of work did he do? What were his most important activities or duties?

| String 500 |

KL11. [CYAQRTH, CYNAMF CYNAML]
What kind of business or industry was that in?

String 500

KL12CITY. [CYAQRTH, CYNAMF CYNAML YNAML]
These next questions are about [your / your wife's / WIFE's/"WIFE's" / your husband's / HEAD's] mother. Where was [your / her / his] mother born?
- ACCEPT Mother substitute

String 25

KL12STATE. [CYAQRTH, CYNAMF CYNAML]
(What State is that in?)
[KL12CITY]
- Start typing the name of the State to bring up the look-up list
- IF foreign country, ENTER [FOR] to select "Foreign Country"

String 30; State Lookup List; State → GO TO KL13CITY   Foreign Country   DK/RF → GO TO KL13CITY
                                                                    ↓

      KL12COUNTRY. [CYAQRTH, CYNAMF CYNAML]
      (What Country is that in?)
      [KL12CITY, KL12STATE]
           - Start typing the name of the Foreign Country to bring up the look-up list

      String 25; Country Lookup List

KL13CITY. [CYAQRTH, CYNAMF CYNAML]
Where did [your / her / his] mother grow up?
- Most of the years from ages 6 to 16

String 25

KL13STATE. [CYAQRTH, CYNAMF CYNAML]
(What State is that in?)
[KL13CITY]
- Start typing the name of the State to bring up the look-up list
- IF foreign country, ENTER [FOR] to select "Foreign Country"

String 30; State Lookup List; State → GO TO KL14   Foreign Country   DK/RF → GO TO KL14
                                                              ↓

      KL13COUNTRY. [CYAQRTH, CYNAMF CYNAML]
      (What Country is that in?)
      [KL13CITY, KL13STATE]
           - Start typing the name of the Foreign Country to bring up the look-up list

      String 25; Country Lookup List

KL14. [CYAQRTH, CYNAMF CYNAML]
Where did [your / her / his] mother receive his education — in the United States, outside the United States, or both?

1. United States only   2. Outside U.S. only   3. Both in U.S. and outside   DK   5. Had no education   RF
        ↓   GO TO KL17CKPT   ↓   GO TO KL20

KL15. [CYAQRTH, CYNAMF CYNAML]
How much education did [your / her / his] mother complete (in the United States)?

1. 0 – 5 grades → GO TO KL16	
2. 6 – 8 grades; "Grade School"	3. 9 – 11 grades; "Junior High"
4. 12 grades; "High School"	5. 12 grades plus non-academic training
6. 13 – 14 years; Some college; Associate's Degree	7. 15 – 16 years; College; Bachelor's Degree
8. 17 or more years; College; Graduate work; Ph.D, Professional degree	DK/RF

GO TO KL17CKPT   ↓

KL15 SOFT CHECK. What is your best estimate, would you say…
- Read code list below

1. 0 – 5 grades,	2. 6 – 8 grades,	3. 9 – 11 grades,	4. 12 grades,
5. 12 grades plus non-academic training,		6. 13 – 14 years or an Associate's Degree,	
7. 15 – 16 years or a Bachelor's Degree, or		8. 17 or more years – a graduate degree, Ph.D, or professional degree?	

KL16. [CYAQRTH, CYNAMF CYNAML]
Could she read and write (in English)?

1. Yes	5. No

KL17CKPT. CAI CHECKPOINT: WHETHER EDUCATED OUTSIDE U.S. (KL14=2, 3)

1. EDUCATED OUTSIDE U.S.   5. ALL OTHERS → GO TO KL20   ↓

KL18. [CYAQRTH, CYNAMF CYNAML]
How many years of school did she complete outside of the U.S.?

1 – 25

KL19. [CYAQRTH, CYNAMF CYNAML]
What was the highest degree or certificate she earned outside the U.S.?

String 100

KL20. [CYAQRTH, CYNAMF CYNAML]
What was [your / her / his] mother's usual occupation when [you / she / he] [were / was] growing up? What kind of work did she do? What were her most important activities or duties?

String 500

KL21. [CYAQRTH, CYNAMF CYNAML]
What kind of business or industry was that in?

String 500

KL22. [CYAQRTH, CYNAMF CYNAML]
Now I have some questions about brothers and sisters. Did [you / your wife / WIFE/"WIFE" / your husband / HEAD] have any brothers?
- INCLUDE natural siblings only

| 1. Yes | 5. No | → GO TO KL28

↓

KL23. [CYAQRTH, CYNAMF CYNAML]
How many brothers was that?

| 1 | | 2 – 25 | DK/RF | → GO TO KL28
↓   ↓

KL24. [CYAQRTH, CYNAMF CYNAML]	KL26. [CYAQRTH, CYNAMF CYNAML]
Is [he / her brother / his brother] still living?	How many of them are still living?
1. Yes 5. No	0 – [KL23 (25)]
KL25. [CYAQRTH, CYNAMF CYNAML]	KL27. [CYAQRTH, CYNAMF CYNAML]
[Is / Was] he older than [you / your wife / WIFE/"WIFE" / your husband / HEAD]?	[Are / Were] any of [your / her / his] brothers older than [you / she is / he is]?
1. Yes 5. No	1. Yes 5. No

KL28. [CYAQRTH, CYNAMF CYNAML]
Did [you / your wife / WIFE/"WIFE" / your husband / HEAD] have any sisters?
- INCLUDE natural siblings only

| 1. Yes | 5. No | → GO TO KL34

↓

KL29. [CYAQRTH, CYNAMF CYNAML]
How many sisters was that?

| 1 | | 2 – 25 | DK/RF | → GO TO KL34
↓   ↓

KL30. [CYAQRTH, CYNAMF CYNAML]	KL32. [CYAQRTH, CYNAMF CYNAML]
Is [she / her / his] sister still living?	How many of them are still living?
1. Yes 5. No	0 – [KL28 (25)]
KL31. [CYAQRTH, CYNAMF CYNAML]	KL33. [CYAQRTH, CYNAMF CYNAML]
[Is / Was] she older than [you / your wife / WIFE/"WIFE" / your husband / HEAD]?	[Are / Were] any of [your / her / his] sisters older than [you / she is / he is]?
1. Yes 5. No	1. Yes 5. No

KL34. [CYAQRTH, CYNAMF CYNAML]
Did [you / WIFE/"WIFE" / HEAD] grow up on a farm, in a small town, in a large city, or what?

| 1. Farm; country | 2. Small town; suburb | 3. Large city | 4. Other-specify | → KL34SPEC. Specify (String 100)

KL35STATE. [CYAQRTH, CYNAMF CYNAML]
In what State (of the U.S.) was that?
- Start typing the name of the State to bring up the look-up list
- IF foreign country, ENTER [FOR] to select "Foreign Country"

| String 30; State Lookup List | | Foreign Country | DK /RF |
↓   ↓

KL35COUNTY. [CYAQRTH, CYNAMF CYNAML]
Can you tell me what **County** that was?

| String 25 | → GO TO KL36 | DK/RF |
↓

KL35CITY. [CYAQRTH, CYNAMF CYNAML]
What was the name of the nearest town or city?

| String 25 |

KL35COUNTRY. [CYAQRTH, CYNAMF CYNAML]
In what Country was that?
- Start typing the name of the Foreign Country to bring up the look-up list

| String 25; Country Lookup List |

KL36. [CYAQRTH, CYNAMF CYNAML]
[Have / Has] [you / WIFE/"WIFE" / HEAD] lived in any other states or countries besides where [you / he / she] [are / is] currently living and where [you / she / he] grew up, including time spent abroad while in the armed forces?
- "LIVED IN" means stayed at least 3 months

| 1. Yes | 5. No |

KL37. [CYAQRTH, CYNAMF CYNAML]
Were [your / WIFE's/"WIFE's" / HEAD's] parents poor when [you / she / he] [were / was] growing up, pretty well off, or what?

| 1. Poor | 3. Average; it varied | 5. Pretty well off |

KL38. [CYAQRTH, CYNAMF CYNAML]
[Were / Was] [you / she / he] living with both [your / her / his] natural parents most of the time until [you / she / he] [were / was] age 16?

| 1. Yes | 5. No |

KL39. [CYAQRTH, CYNAMF CYNAML]
In order to get an idea of the different races and ethnic groups that participate in the study, I would like to ask you about [your / your wife's / WIFE's/"WIFE's"] / your husband's / HEAD's] background. [Are / Is] [you / he / she] Spanish, Hispanic, or Latino? That is, Mexican, Mexican American, Chicano, Puerto Rican, Cuban, or other Spanish?

| 0. Not Spanish/Hispanic | 1. Mexican | 2. Mexican American | 3. Chicano | 4. Puerto Rican |
| 5. Cuban | 7. Other-specify | → KL39SPEC. Specify (String 100) |

KL40. [CYAQRTH, CYNAMF CYNAML]
What is [your / her / his] race? [Are / Is] [you / she / he] white, black, American Indian, Alaska Native, Asian, Native Hawaiian or Other Pacific Islander?
- ENTER all that apply
- PROBE: Any others?

1. White	2. Black, African-American, or Negro	3. American Indian or Alaska Native	4. Asian
5. Native Hawaiian or Pacific Islander		7. Other-specify → KL40SPEC. Specify (String 100)	

KL41. [CYAQRTH, CYNAMF CYNAML]
What is [your / her / his] ancestry or ethnic origin? From what country or part of the world did [her / his] ancestors come from?
- PROBE: Is there a second? (What is it?)
- DO NOT ACCEPT a State in the United States

String 200

KL42. [CYAQRTH, CYNAMF CYNAML]
[Have / Has] [you / she / he] ever been in the United States military service?

1. Yes	5. No

KL43. [CYAQRTH, CYNAMF CYNAML]
Where did [you / your wife / WIFE/"WIFE" / your husband / HEAD] receive [your / her / his] education — in the United States, outside the United States, or both?

1. United States only	2. Outside U.S. only	3. Both in U.S. and outside	DK	5. Had no education	RF
↓	GO TO KL59CKPT	↓		GO TO KL62	

KL44. [CYAQRTH, CYNAMF CYNAML]
Now I would like to talk about the education [you / he / she] [have / has] received. Did [you / she / he] graduate from high school, get a GED, or neither?

1. Graduated from high school	2. Got a GED	3. Neither	DK/RF
↓	GO TO KL46	GO TO KL49	GO TO KL51

KL45MO. [CYAQRTH, CYNAMF CYNAML]
In what month and year did [you / she / he] graduate?
- SELECT Month and [Enter] to go to next screen for year

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December
21. Winter	22. Spring	23. Summer	24. Fall		

KL45YR. [CYAQRTH, CYNAMF CYNAML]
The month entered is: [KL45MO]
- ENTER the year below

1901 – [CYEAR]

GO TO KL51

KL46. [CYAQRTH, CYNAMF CYNAML]
How many grades of school did [you / she / he] finish prior to getting [your / her / his] GED?
- Record last grade finished prior to receiving GED

| 0. None | → GO TO KL48MO |

| 1. First grade | 2. Second grade | 3. Third grade | 4. Fourth grade | 5. Fifth grade | 6. Sixth grade |

| 7. Seventh grade | 8. Eighth grade | 9. Ninth grade | 10. Tenth grade | 11. Eleventh grade | DK/RF |

↓   GO TO KL48MO

KL47MO. [CYAQRTH, CYNAMF CYNAML]
In what month and year did [you / she / he] last attend [KL46]?
- SELECT Month and [Enter] to go to next screen for year

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |

| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December |

| 21. Winter | 22. Spring | 23. Summer | 24. Fall |

KL47YR. [CYAQRTH, CYNAMF CYNAML]
The month entered is: [KL47MO]
- ENTER the year below

| 1901 – [CYEAR] |

KL48MO. [CYAQRTH, CYNAMF CYNAML]
In what month and year did [you / she / he] receive [your / her / his] GED?
- SELECT Month and [Enter] to go to next screen for year

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |

| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December |

| 21. Winter | 22. Spring | 23. Summer | 24. Fall |

KL48YR. [CYAQRTH, CYNAMF CYNAML]
The month entered is: [KL48MO]
- ENTER the year below

| 1901 – [CYEAR] |

GO TO KL51

KL49. [CYAQRTH, CYNAMF CYNAML]
How many grades of school did [you / she / he] finish?
- Record last grade finished

| 0. None | → GO TO KL51 |

| 1. First grade | 2. Second grade | 3. Third grade | 4. Fourth grade | 5. Fifth grade | 6. Sixth grade |

| 7. Seventh grade | 8. Eighth grade | 9. Ninth grade | 10. Tenth grade | 11. Eleventh grade | DK/RF |

↓   GO TO KL51

KL50MO. [CYAQRTH, CYNAMF CYNAML]
In month and what year did [you / she / he] last attend [KL49]?
- SELECT Month and [Enter] to go to next screen for year

| 1. January | 2. February | 3. March | 4. April | 5. May | 6. June |

| 7. July | 8. August | 9. September | 10. October | 11. November | 12. December |

| 21. Winter | 22. Spring | 23. Summer | 24. Fall |

KL50YR. [CYAQRTH, CYNAMF CYNAML]
The month entered is: [KL50MO]
- ENTER the year below

| 1901 – [CYEAR] |

KL51. [CYAQRTH, CYNAMF CYNAML]
Did [you / she / he] attend college?

| 1. Yes | | 5. No | → GO TO KL59CKPT

↓

KL52MO. [CYAQRTH, CYNAMF CYNAML]
In what month and year did [you / she / he] last attend college?
- If still in school, ENTER [96] for month
- SELECT Month and [Enter] to go to next screen for year

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December
21. Winter	22. Spring	23. Summer	24. Fall		

| 96. Still in school |

↓   GO TO KL53

KL52YR. [CYAQRTH, CYNAMF CYNAML]
The month entered is: [KL52MO]
- ENTER the year below
9996   If still in school

| 1901 – [CYEAR] | | 9996. Still in school |

KL53. [CYAQRTH, CYNAMF CYNAML]
What is the highest year of college [you / he / she] [have / has] completed?
- IF R gives a degree: How many years of college [have / has] [you / she / he] completed? We'll talk about any college degrees [you / he / she] [have / has] earned next.

| 0. Less than one year | 1. One year | 2. Two years | 3. Three years | 4. Four years | 5. Five years or more |

GO TO KL59CKPT   ↓

KL54. [CYAQRTH, CYNAMF CYNAML]
Did [you / she / he] receive a college degree?

| 1. Yes | | 5. No | → GO TO KL59CKPT

↓

KL55. [CYAQRTH, CYNAMF CYNAML]
What is the highest college degree [you / he / she] [have / has] received?

1. Associate's degree/AA	2. Bachelor's degree/BA/BS
3. Master's degree/MA/MS/MBA	4. Doctorate/PhD	5. LLB, JD (Law degrees)
6. MD, DDS, DVM, DO (Medical degrees)	8. Honorary degree
97. Other-specify	→ KL55SPEC. Specify (String 100)

KL56. [CYAQRTH, CYNAMF CYNAML]
What was the name of the college?
- IF NEEDED: What is the name of the college from which [you / she / he] received [your / her / his] highest degree?

| String 25 |

KL57. [CYAQRTH, CYNAMF CYNAML]
Where was it located?
- IF NEEDED: Where is the college from which [you / she /he] received [your / her / his] highest degree?

String 25

KL58MO. [CYAQRTH, CYNAMF CYNAML]
In what month and year did [you / she / he] receive that degree?
- IF NEEDED: When did [you / she / he] receive [your / her / his] highest degree?
- SELECT Month and [Enter] to go to next screen for year

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December
21. Winter	22. Spring	23. Summer	24. Fall		

KL58YR. [CYAQRTH, CYNAMF CYNAML]
The month entered is: [KL58MO]
- ENTER the year below

1901 – [CYEAR]

KL59CKPT. CAI CHECKPOINT: WHETHER EDUCATED OUTSIDE U.S. (KL43=2, 3)

1. EDUCATED OUTSIDE U.S. 5. ALL OTHERS → GO TO KL62
↓

KL60. [CYAQRTH, CYNAMF CYNAML]
How many years of school did [you / she / he] complete outside of the U.S.?

1 – 25

KL61. [CYAQRTH, CYNAMF CYNAML]
What was the highest degree or certificate [you / she / he] earned outside the U.S.?

String 100

KL62. [CYAQRTH, CYNAMF CYNAML]
Did [you / she / he] receive any other degree or a certificate through a vocational school, a training school, or an apprenticeship program?
- IWER: This includes vocational training received in the military and military occupational specialties (MOS)

1. Yes 5. No → GO TO KL68 RULE
↓

KL63. [CYAQRTH, CYNAMF CYNAML]
What type of degree or certificate was that?

1. Degree 2. Certificate 3. License 4. Diploma (not High School)
7. Other-specify → KL63SPEC. Specify (String 100)

KL64. [CYAQRTH, CYNAMF CYNAML]
In what field was that?

String 100

KL65. [CYAQRTH, CYNAMF CYNAML]
From what type of institution or organization was that?

1. Vocational/Trade school	2. Community/Junior college	
3. Business/Secretarial school	4. Armed Forces	5. High school
6. Hospital/Health Care facility or school	7. Cosmetology/Beauty/Barber school	
8. Police/Firefighter training program	9. Job training through government; except code	
10. Training by private employer	11. Religious Institution or Bible College/School	
7. Other-specify	→ KL65SPEC. Specify (String 100)	

KL66MO. [CYAQRTH, CYNAMF CYNAML]
In what month and year did [you / she / he] receive that degree or certificate?
- SELECT Month and [Enter] to go to next screen for year

1. January	2. February	3. March	4. April	5. May	6. June
7. July	8. August	9. September	10. October	11. November	12. December
21. Winter	22. Spring	23. Summer	24. Fall		

KL66YR. [CYAQRTH, CYNAMF CYNAML]
The month entered is: [KL66MO]
- ENTER the year below

1901 – [CYEAR]

KL67. [CYAQRTH, CYNAMF CYNAML]
Did [you / she / he] receive any other training degree or certificate?
- This includes vocational training received in the military and military occupational specialties (MOS)

1. Yes → REPEAT KL63–KL67;   5. No → GO TO KL68
THEN GO TO KL68

KL68. [CYAQRTH, CYNAMF CYNAML]
What is [your / your wife's / WIFE's/"WIFE's" / your husband's / HEAD's] religious preference?
- IF answer is generic, such as "Christian" or "Protestant", PROBE: What denomination is that?

0. None	1. Catholic	2. Jewish	8. Protestant	10. Non-Christian/Muslim/Buddhist

GO TO KL70 RULE   ↓   13. Greek/Russian/Eastern Orthodox

97. Other-Specify → KL68SPEC. Specify (String 100)

GO TO KL70 RULE

KL69. [CYAQRTH, CYNAMF CYNAML]
What denomination is that?

03. Baptist	04. Lutheran	05. Methodist/ African Methodist	06. Presbyterian	07. Episcopalian
08. Protestant, Unspecified	12. Jehovah's Witness	14. "Christian"	18. Pentecostal/ Assembly of God	
97. Other-Specify	→ KL69SPEC. Specify (String 100)			

KL70 RULE. WHETHER NEW WIFE/"WIFE"/HEAD IS 18 YEARS OLD OR OLDER (AGEIWDATE>17)

>17 YEARS OLD <18 YEARS OLD → GO TO KL1@END
       ↓

KL70. [CYAQRTH, CYNAMF CYNAML]

How many years altogether [have / has] [you / she / he] worked for money since [you / she / he] [were / was] 18?

- FOR none, ENTER [0]
- FOR 1 year or less, ENTER [1]
- FOR all years since 18, ENTER [96]

| 0 | → GO TO KL1@END | 1 – [AGEIWDATE minus 18] | 96. All years since 18 | DK/RF |

↓

KL71. [CYAQRTH, CYNAMF CYNAML]

How many of these years did [you / she / he] work full-time for most or all of the year?

- FOR none, ENTER [0]
- FOR 1 year or less, ENTER [1]
- [*KL70=96*: FOR all years since 18, ENTER [96]

| 0 | → GO TO KL1@END | 1 – [AGEIWDATE minus 18] | [*KL70=96*: 96. All years since 18] | DK/RF |

↓

KL72. [CYAQRTH, CYNAMF CYNAML]

Thinking of [your / her / his] first full-time regular job, what kind of work did [you / she / he] do? What were [your / her / his] most important activities or duties?

Open End

KL73. [CYAQRTH, CYNAMF CYNAML]

What kind of business or industry was that in?

Open End

Section M: Philanthropy

M0 RULE. WHETHER RESPONDENT IS HEAD OR WIFE/"WIFE" (RESPONDENT=1, 2, 3)

R IS HEAD/WIFE/"WIFE"   ALL OTHERS → GO TO IW END
↓

Donations

M1_INTRO. Next, we will be talking about money donations to charitable organizations.

> **Charitable organizations** include religious or non-profit organizations that help those in need or that serve and support the public interest. They range in size from national organizations like the United Way and the American Red Cross down to local community organizations. They serve a variety of purposes such as religious activity, helping people in need, health care and medical research, education, arts, environment, and international aid. Our definition of charity **does not include** political contributions.
> **Donations** include any gifts of money, assets, or property or goods made directly to the organization, through payroll deduction, or collected by other means on behalf of the charity. This interview is limited to donations made during the calendar year [PYEAR].
> - ENTER [1] to continue
>
> 1. Continue

M1. **During the year [PYEAR]**, did you [*CYEAR FU COUNT>1*: or anyone in your family] **donate** money, assets, or property or goods, with a combined value of **more than $25** to religious or charitable organizations?

> 1. Yes   5. No → GO TO VOLINTRO
>
> ↓

> M2. Did you make any donations specifically for **religious purposes or spiritual development**, for example to a church, synagogue, mosque, TV or radio ministry? Please do not include donations to schools, hospitals, and other charities run by religious organizations. I will be asking you about those donations next.
>
> > 1. Yes   5. No → GO TO M3
> >
> > ↓
>
> > M2A. Altogether, what was the total dollar value of all donations you [and your family] made **in [PYEAR]** towards **religious purposes**?
> >
> > > $ 1 – 999,997 → GO TO M3   DK/RF
> > >
> > > ↓

M2B. Was it $300 or more?	
1. Yes	5. No DK/RF → GO TO M3
↓	↓
M2C. Was it $1,000 or more?	M2E. Was it $100 or more?
1. Yes 5. No DK/RF	1. Yes 5. No DK/RF
↓ GO TO M3	GO TO M3
M2D. Was it $2,500 or more?	
1. Yes 5. No DK/RF	
GO TO M3	

M3. [*M2=YES*: (Not counting the donations you just told me about, (during [PYEAR],)) / *ALL OTHERS*: (During [PYEAR],)] did you [*CYEAR FU COUNT>1*: or anyone in your family] donate to any organization that served a **combination of purposes**? For example, the United Way, the United Jewish Appeal, the Catholic Charities, or your local community foundation?

| 1. Yes | 5. No | → GO TO M4

↓

M3A. (Altogether,) what was the total dollar value of all donations you [*CYEAR FU COUNT>1*: and your family] made **in [PYEAR]** towards **combined purpose funds**?

| $ 1 – 999,997 | → GO TO M4 | DK/RF |

↓

M3B. Was it $200 or more?

| 1. Yes | | 5. No | DK/RF | → GO TO M4

↓   ↓

M3C. Was it $500 or more?   M3E. Was it $100 or more?

| 1. Yes | 5. No | DK/RF | | 1. Yes | 5. No | DK/RF |

↓   GO TO M4   GO TO M4

M3D. Was it $1,000 or more?

| 1. Yes | 5. No | DK/RF |

GO TO M4

M4. [*M2 OR M3=YES*: Not counting the donations you just told me about, did you / *ALL OTHERS*: Did you] [*CYEAR FU COUNT>1*: or anyone in your family] make any donations (during [PYEAR]) to organizations that **help people in need** of **food, shelter, or other basic necessities**?

| 1. Yes | 5. No | → GO TO M5

↓

M4A. What was the total dollar value of all donations you [*CYEAR FU COUNT>1*: and your family] made **in [PYEAR]** to organizations that **help people in need** of **basic necessities**?

| $ 1 – 999,997 | → GO TO M4 | DK/RF |

↓

M4B. Was it $200 or more?

| 1. Yes | | 5. No | DK/RF | → GO TO M5

↓   ↓

M4C. Was it $500 or more?   M4E. Was it $100 or more?

| 1. Yes | 5. No | DK/RF | | 1. Yes | 5. No | DK/RF |

↓   GO TO M5   GO TO M5

M4D. Was it $1,000 or more?

| 1. Yes | 5. No | DK/RF |

GO TO M5

M5. [*ANY M2, M3, M4=YES*: (Not counting the donations you just told me about,) did you / *ALL OTHERS*: Did you] [*CYEAR FU COUNT>1*: or anyone in your family] make donations (during [PYEAR]) to **health care or medical research** organizations? For example, to hospitals, nursing homes, mental health facilities, cancer, heart and lung associations, or telethons?

| 1. Yes | 5. No | → GO TO M6

↓

M5A. What was the total dollar value of all donations you [*CYEAR FU COUNT>1*: and your family] made **in [PYEAR]** towards **health care or medical research** organizations?

| $ 1 – 999,997 | → GO TO M6 | DK/RF |

↓

M5B. Was it $200 or more?

| 1. Yes | | 5. No || DK/RF | → GO TO M6

↓   ↓

M5C. Was it $500 or more?   M5E. Was it $100 or more?

| 1. Yes || 5. No || DK/RF | | 1. Yes || 5. No || DK/RF |

↓   GO TO M6   GO TO M6

M5D. Was it $1,000 or more?

| 1. Yes || 5. No || DK/RF |

GO TO M6

M6. [*ANY M2, M3, M4, M5=YES*: (Not counting the donations you just told me about,) did you / *ALL OTHERS*: Did you] [*CYEAR FU COUNT>1*: or anyone in your family] make donations (during [PYEAR]) towards **educational** purposes? For example, to colleges, grade schools, PTAs, libraries, or scholarship funds? Please do not include direct tuition payments for you or other family members.

| 1. Yes | 5. No | → GO TO M7

↓

M6A. What was the total dollar value of all donations you [*CYEAR FU COUNT>1*: and your family] made **in [PYEAR]** towards **educational** purposes?

| $ 1 – 999,997 | → GO TO M7 | DK/RF |

↓

M6B. Was it $200 or more?

| 1. Yes | | 5. No || DK/RF | → GO TO M7

↓   ↓

M6C. Was it $500 or more?   M6E. Was it $100 or more?

| 1. Yes || 5. No || DK/RF | | 1. Yes || 5. No || DK/RF |

↓   GO TO M7   GO TO M7

M6D. Was it $1,000 or more?

| 1. Yes || 5. No || DK/RF |

GO TO M7

M7. [*ANY M2, M3, M4, M5, M6=YES*: Not counting the donations you just told me about, (during [PYEAR],) / *ALL OTHERS*: (During [PYEAR],)] did you [*CYEAR FU COUNT>1*: or anyone in your family] make donations to organizations that provide **youth or family services**? Such as to scouting, boys' and girls' clubs, sports leagues, Big Brothers or Sisters, foster care, or family counseling?

    | 1. Yes | | 5. No | → GO TO M8

    ↓

    M7A. What was the total dollar value of all donations you [*CYEAR FU COUNT>1*: and your family] made **in [PYEAR]** towards **youth and family services** purposes?

        | $ 1 – 999,997 | → GO TO M8 | DK/RF |

                                                ↓

    ┌───┐
    M7B. Was it $200 or more?

        | 1. Yes | | 5. No | | DK/RF | → GO TO M8

        ↓   ↓

    M7C. Was it $500 or more?   M7E. Was it $100 or more?

    | 1. Yes | | 5. No | | DK/RF | | 1. Yes | | 5. No | | DK/RF |

      ↓   GO TO M8   GO TO M8

    M7D. Was it $1,000 or more?

    | 1. Yes | | 5. No | | DK/RF |

           GO TO M8
    └───┘

M8. [*ANY M2, M3, M4, M5, M6, M7=YES*: (Not counting the donations you just told me about, (during [PYEAR],) / *ALL OTHERS*: (During [PYEAR],)] did you [*CYEAR FU COUNT>1*: or anyone in your family] make donations to organizations that support or promote the **arts, culture, or ethnic awareness**? Such as, to a museum, theatre, orchestra, public broadcasting, or ethnic cultural awareness?

    | 1. Yes | | 5. No | → GO TO M9

    ↓

    M8A. What was the total dollar value of all donations you [*CYEAR FU COUNT>1*: and your family] made **in [PYEAR]** towards the **arts, culture, or ethnic awareness?**

        | $ 1 – 999,997 | → GO TO M9 | DK/RF |

                                                ↓

    ┌───┐
    M8B. Was it $200 or more?

        | 1. Yes | | 5. No | | DK/RF | → GO TO M9

        ↓   ↓

    M8C. Was it $500 or more?   M8E. Was it $100 or more?

    | 1. Yes | | 5. No | | DK/RF | | 1. Yes | | 5. No | | DK/RF |

      ↓   GO TO M9   GO TO M9

    M8D. Was it $1,000 or more?

    | 1. Yes | | 5. No | | DK/RF |

           GO TO M9
    └───┘

M9. [*ANY M2, M3, M4, M5, M6, M7, M8=YES*: Not counting the donations you just told me about, (during [PYEAR],) / *ALL OTHERS*: (During [PYEAR],)] did you [*CYEAR FU COUNT>1*: or anyone in your family] make donations to organizations that **improve neighborhoods and communities**? Such as, to community associations or service clubs?

    | 1. Yes | | 5. No | → GO TO M10

    ↓

    M9A. What was the total dollar value of all donations you [*CYEAR FU COUNT>1*: and your family] made **in [PYEAR]** towards **improving neighborhoods and communities**?

        | $ 1 – 999,997 | → GO TO M10 | DK/RF |

                                        ↓

        ┌───┐
        M9B. Was it $200 or more?

            | 1. Yes | | 5. No | | DK/RF | → GO TO M10

              ↓   ↓

           M9C. Was it $500 or more?   M9E. Was it $100 or more?

             | 1. Yes | | 5. No | | DK/RF | | 1. Yes | | 5. No | | DK/RF |
              ↓   GO TO M10   GO TO M10

          M9D. Was it $1,000 or more?

              | 1. Yes | | 5. No | | DK/RF |
                 GO TO M10
        └───┘

M10. [*ANY M2, M3, M4, M5, M6, M7, M8 , M9=YES*: (Not counting the donations you just told me about, (during [PYEAR],) / *ALL OTHERS*: (During [PYEAR],)] did you [*CYEAR FU COUNT>1*: or anyone in your family] make donations to organizations that **preserve the environment**? Such as, for conservation efforts, animal protection, or parks?

    | 1. Yes | | 5. No | → GO TO M11

    ↓

    M10A. What was the total dollar value of all donations you [*CYEAR FU COUNT>1*: and your family] made **in [PYEAR]** towards **preserving the environment**?

        | $ 1 – 999,997 | → GO TO M11 | DK/RF |

                                          ↓

        ┌───┐
        M10B. Was it $200 or more?

            | 1. Yes | | 5. No | | DK/RF | → GO TO M11

              ↓   ↓

          M10C. Was it $500 or more?   M10E. Was it $100 or more?

             | 1. Yes | | 5. No | | DK/RF | | 1. Yes | | 5. No | | DK/RF |
              ↓   GO TO M11   GO TO M11

          M10D. Was it $1,000 or more?

              | 1. Yes | | 5. No | | DK/RF |
                 GO TO M11
        └───┘

M11. [*ANY M2–M10=YES*: (Not counting the donations you just told me about, (during [PYEAR],) / *ALL OTHERS*: (During [PYEAR],)] did you [*CYEAR FU COUNT>1*: or anyone in your family] make donations to organizations that provide international aid or promote world peace? Such as, international children's funds, disaster relief, or human rights?

   1. Yes   5. No   → GO TO M12
   ↓

   M11A. What was the total dollar value of all donations you [*CYEAR FU COUNT>1*: and your family] made **in [PYEAR]** towards **providing international aid or promoting world peace**?

   $ 1 – 999,997   → GO TO M12   DK/RF
                                           ↓

   M11B. Was it $200 or more?
         1. Yes   5. No   DK/RF   → GO TO M12
          ↓   ↓
      M11C. Was it $500 or more?   M11E. Was it $100 or more?
        1. Yes   5. No   DK/RF   1. Yes   5. No   DK/RF
          ↓   GO TO M12   GO TO M12
      M11D. Was it $1,000 or more?
        1. Yes   5. No   DK/RF
               GO TO M12

M12. [*ANY M2–M11=YES*: Not counting the donations you just told me about, (during [PYEAR],) / *ALL OTHERS*: (During [PYEAR],)] did you [*CYEAR FU COUNT>1*: or anyone in your family] make donations of money, assets, or property to charitable organizations with purposes **other than** those we just talked about?

   1. Yes   5. No   → GO TO VOLINTRO
   ↓

   M12A. What was the main purpose or cause supported by that organization? (AO) Please tell me a little more about that. What do these organizations do?
   String 200

   M12B. What was the total dollar value of all donations you [*CYEAR FU COUNT>1*: and your family] made **in [PYEAR]** towards **(this / these) last purpose(s)**?

   $ 1 – 999,997   → GO TO VOLINTRO   DK/RF
                                           ↓

   M12C. Was it $200 or more?
         1. Yes   5. No   DK/RF   → GO TO VOLINTRO
          ↓   ↓
      M12D. Was it $500 or more?   M12F. Was it $100 or more?
        1. Yes   5. No   DK/RF   1. Yes   5. No   DK/RF
          ↓   GO TO VOLINTRO   GO TO VOLINTRO
      M12E. Was it $1,000 or more?
        1. Yes   5. No   DK/RF
   GO TO VOLINTRO

Volunteering

VOLINTRO. Now we are interested in volunteer activities; that is, activities for which people **are not paid**, except perhaps expenses. We only want you to include volunteer activities that you [*W/"W" IN FU*: or [*R=HEAD*: WIFE/"WIFE" / *R=W/"W"*: HEAD]] did **through or for an organization**, even if you [*W/"W" IN FU*: or [*R=HEAD*: WIFE/"WIFE" / *R=W/"W"*: HEAD]] only did them once in a while.

- ENTER [1] to continue

1. Continue

RVOLAQSN. AQSN OF RESPONDENT
SVOLAQSN. AQSN OF SPOUSE

M14CKPT. CAI CHECKPOINT: WHETHER WIFE/"WIFE" IN FU (CYFUHU=1, 4 & CYAQRTH=202, 222)

1. NO WIFE/"WIFE" IN FU	5. WIFE/"WIFE" IN FU	→ GO TO M14C
↓		
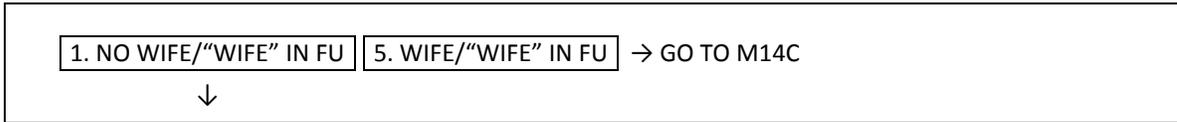
Head Only in FU

M14A. Now think about last year, January through December of **[PYEAR]**. Did you do **any** volunteer activity through or for an organization?

1. Yes → GO TO M15 RULE   5. No
↓

M14A1. Sometimes people don't think of activities they do **infrequently or activities they do for children's schools or youth organizations** as volunteer activities. Last year ([PYEAR]) did you do any of these types of volunteer activities?

1. Yes → GO TO M15 RULE   5. No → GO TO M56A

Head and Wife/"Wife" in FU

M14C. Now think about last year, January through December of **[PYEAR]**. Did **either** you or [SPOUSE] do **any** volunteer activity through or for an organization?

- IF "Yes": Was that just **you**, just [**SPOUSE**], or **both** of you who volunteered (last year)?

1. Respondent only	2. Spouse only	3. Both	5. No; neither	DK/RF
↓	↓	GO TO M15 RULE		↓

M14C1. Sometimes people don't think of activities they do **infrequently or activities they do for children's schools or youth organizations** as volunteer activities. Last year did [SPOUSE] do any of these types of volunteer activities?

1. Yes   5. No

M14C2. Sometimes people don't think of activities they do **infrequently or activities they do for children's schools or youth organizations** as volunteer activities. Last year did you do any of these types of volunteer activities?

1. Yes   5. No

M14C3. Sometimes people don't think of activities they do **infrequently or activities they do for children's schools or youth organizations** as volunteer activities. Last year did you or [WIFE/"WIFE" / HEAD] do any of these types of volunteer activities?

- IF "Yes": Was that just **you**, just [**SPOUSE**], or **both** of you who volunteered (last year)?

1. Respondent	2. Spouse
3. Both	5. No; neither

M14 RULE. WHO VOLUNTEERED DURING PYEAR

R VOLUNTEERED (RVOL=1)	M14A = YES OR M14A1 = YES OR M14C = R, BOTH (1, 3) OR M14C2 = YES OR M14C3 = R, BOTH (1, 3)
SPOUSE VOLUNTEERED (SVOL=1)	M14C = SPOUSE, BOTH (2, 3) OR M14C1 = YES OR M14C3 = SPOUSE, BOTH (2, 3)

Place of Worship - Respondent
M15 RULE. WHETHER R ONLY (RVOL=1 & SVOL=0), SPOUSE ONLY (RVOL=0 & SVOL=1), BOTH (RVOL=1 & SVOL=1), OR
        NEITHER (RVOL=0 & SVOL=0) VOLUNTEERED

R ONLY	SPOUSE ONLY	BOTH	NEITHER
↓	GO TO M17 RULE	↓	GO TO IW END

M15. **During [PYEAR]**, did you yourself do volunteer activity at or through your **church, synagogue, or mosque**, such as
        serving on a committee, assisting in worship, teaching, or helping others through programs organized by your
        place of worship? Please do not include volunteering through schools, hospitals, and other charities run by
        religious organizations. I will be asking you about that volunteering next.
        1. Yes   5. No

Place of Worship - Spouse
M17 RULE. WHETHER R ONLY, SPOUSE ONLY, OR BOTH VOLUNTEERED

R ONLY	SPOUSE ONLY	BOTH
GO TO M20 RULE	↓	

M18. [*SPOUSE ONLY*: **During [PYEAR]**, did [SPOUSE] do volunteer activity at or through [his / her] **church, synagogue, or
        mosque**, such as serving on a committee, assisting in worship, teaching, or helping others through programs
        organized by [his / her] place of worship? Please do not include any volunteering through schools, hospitals, and
        other charities run by religious organizations.]
        [*BOTH*: And during [PYEAR], did [SPOUSE] do volunteer activity at or through [his / her] **church, synagogue, or
        mosque,** not including any volunteering through schools, hospitals, and other charities run by religious
        organizations?]
        1. Yes   5. No

Organizations for Children - Respondent
M20 RULE. WHETHER R ONLY, SPOUSE ONLY, OR BOTH VOLUNTEERED

R ONLY	SPOUSE ONLY	BOTH
↓	GO TO M22 RULE	↓

M21. [*M15=YES*: Not counting your volunteering you just told me about (during [PYEAR]), / *ALL OTHERS*: During [PYEAR],]
        did you yourself volunteer through organizations for **children and youth**, such as helping at school, cooking for a
        bake sale, coaching, or being a youth leader?
        1. Yes   5. No

Organizations for Children - Spouse
M22 RULE. WHETHER R ONLY, SPOUSE ONLY, OR BOTH VOLUNTEERED

R ONLY	SPOUSE ONLY	BOTH
GO TO M24 RULE	↓	

M23. [*SPOUSE ONLY-M18=YES*: ~~(Not counting [SPOUSE's] volunteering you just told me about (during [PYEAR]),)~~ / *ALL OTHERS*: During [PYEAR],] did [SPOUSE] volunteer through organizations for **children and youth**, such as helping at school, cooking for a bake sale, coaching, or being a youth leader?]
   [*BOTH-M18=YES*: (And) not counting [SPOUSE's] volunteering you just told me about (during [PYEAR]), / *ALL OTHERS*: (And) during [PYEAR],] did [SPOUSE] volunteer through organizations for **children and youth**?]

   1. Yes   5. No

Organizations for Seniors - Respondent
M24 RULE. WHETHER R ONLY, SPOUSE ONLY, OR BOTH VOLUNTEERED

R ONLY	SPOUSE ONLY	BOTH
↓	GO TO M26 RULE	↓

M25. [ANY *M15, M21=YES*: (Not counting your volunteering you just told me about during [PYEAR]), / *ALL OTHERS*: During [PYEAR],] did you volunteer through organizations for **senior citizens**, such as helping at a nursing home or a senior citizens center, providing emotional or social support, visiting, driving, or delivering food?

   1. Yes   5. No

Organizations for Seniors - Spouse
M26 RULE. WHETHER R ONLY, SPOUSE ONLY, OR BOTH VOLUNTEERED

R ONLY	SPOUSE ONLY	BOTH
GO TO M28 RULE	↓	

M27. [*SPOUSE ONLY-ANY M18, M23=YES*: (Not counting [SPOUSE's] volunteering you just told me about during [PYEAR]), / *ALL OTHERS*: During [PYEAR],] did [SPOUSE] volunteer through organizations for **senior citizens**, such as helping at a nursing home or a senior citizens center, providing emotional or social support, visiting, driving, or delivering food?]
   [*BOTH-ANY M18, M23=YES*: ((And) not counting [SPOUSE's] volunteering you just told me about during [PYEAR]), / *ALL OTHERS*: (And) during [PYEAR],] did [SPOUSE] volunteer through organizations for **senior citizens**?]

   1. Yes   5. No

Organizations for People In Poor Health - Respondent
M28 RULE. WHETHER R ONLY, SPOUSE ONLY, OR BOTH VOLUNTEERED

R ONLY	SPOUSE ONLY	BOTH
↓	GO TO M30 RULE	↓

M29. [*ANY M15, M21, M25=YES*: Not counting your volunteering you just told me about (during [PYEAR]), / *ALL OTHERS*: During [PYEAR],] did you volunteer through organizations that help **people in poor health,** such as helping at a hospital, hospice or clinic, or raising funds to fight disease?

   1. Yes   5. No

Organizations for People In Poor Health - Spouse
M30 RULE. WHETHER R ONLY, SPOUSE ONLY, OR BOTH VOLUNTEERED

R ONLY	SPOUSE ONLY	BOTH
GO TO M32 RULE	↓	

M31. [*SPOUSE ONLY-ANY M18, M23, M27=YES*: Not counting [SPOUSE's] volunteering you just told me about (during [PYEAR]), / *ALL OTHERS*: During [PYEAR],] did [SPOUSE] volunteer through organizations that help **people in poor health,** such as helping at a hospital, hospice or clinic, or raising funds to fight disease?]
   [*BOTH-ANY M18, M23, M27=YES*: (And) not counting [SPOUSE's] volunteering you just told me about (during [PYEAR]), / *ALL OTHERS*: (And) during [PYEAR],] did [SPOUSE] volunteer through organizations that help **people in poor health**?]

1. Yes	5. No

Organizations for People In Need - Respondent
M32 RULE. WHETHER R ONLY, SPOUSE ONLY, OR BOTH VOLUNTEERED

R ONLY	SPOUSE ONLY	BOTH
↓	GO TO M34 RULE	↓

M33. [*ANY M15, M21, M25, M29=YES*: (Not counting your volunteering you just told me about during [PYEAR]), / *ALL OTHERS*: During [PYEAR],] did you volunteer through organizations to **help people in need,** such as working at a soup kitchen, building or repairing a house, or providing other **basic necessities**?

1. Yes	5. No

Organizations for People In Need - Spouse
M34 RULE. WHETHER R ONLY, SPOUSE ONLY, OR BOTH VOLUNTEERED

R ONLY	SPOUSE ONLY	BOTH
GO TO M36 RULE	↓	

M35. [*SPOUSE ONLY-ANY M18, M23, M27, M31=YES*: (Not counting [SPOUSE's] volunteering you just told me about during [PYEAR]), / *ALL OTHERS*: During [PYEAR],] did [SPOUSE] volunteer through organizations that **help people in need,** such as working at a soup kitchen, building or repairing a house, or providing other **basic necessities**?]
   [*BOTH-ANY M18, M23, M27, M31=YES*: ((And) not counting [SPOUSE's] volunteering you just told me about during [PYEAR]), / *ALL OTHERS*: (And) during [PYEAR],] did [SPOUSE] through organizations that **help people in need**?]

1. Yes	5. No

Organizations for Social Change - Respondent
M36 RULE. WHETHER R ONLY, SPOUSE ONLY, OR BOTH VOLUNTEERED

R ONLY	SPOUSE ONLY	BOTH
↓	GO TO M38 RULE	↓

M37. [*ANY M15, M21, M25, M29, M33=YES*: (Not counting your volunteering you just told me about during [PYEAR]), / *ALL OTHERS*: During [PYEAR],] did you volunteer through organizations to bring about **social change**, such as civic or community action, working for a political party or advocacy group?

1. Yes	5. No

Organizations for Social Change - Spouse
M38 RULE. WHETHER R ONLY, SPOUSE ONLY, OR BOTH VOLUNTEERED

R ONLY	SPOUSE ONLY	BOTH
GO TO M40 RULE	↓	

M39. [*SPOUSE ONLY-ANY M18, M23, M27, M31, M35=YES*: (Not counting [SPOUSE's] volunteering you just told me about during [PYEAR]), / *ALL OTHERS*: During [PYEAR],] did [SPOUSE] volunteer through organizations to bring about **social change**, such as civic or community action, working for a political party or advocacy group?]
  [*BOTH-ANY M18, M23, M27, M31, M35=YES*: ((And) not counting [SPOUSE's] volunteering you just told me about during [PYEAR]), / *ALL OTHERS*: (And) during [PYEAR],] did [SPOUSE] volunteer through organizations to bring about **social change**?]

1. Yes	5. No

Other Volunteering - Respondent
M40 RULE. WHETHER R ONLY, SPOUSE ONLY, OR BOTH VOLUNTEERED

R ONLY	SPOUSE ONLY	BOTH
↓	GO TO M44 RULE	↓

M41INTRO. [*ANY M15, M21, M25, M29, M33, M37=YES*: Did / *ALL OTHERS*: During [PYEAR], did] you do any **other** volunteering (through organizations) for purposes or activities that we have **not already mentioned**?
  • IF necessary: This might be working a hotline, helping animals or the environment, supporting arts and cultural activity, or working in the community and neighborhood. Or **any other activities** such as serving on a board or a committee, doing office work, fund raising, organizing events, or consulting?

| 1. Yes | 5. No | → GO TO M42 RULE
|---|---|
| ↓ | |

M41OPEN. What were those volunteering activities? Can you tell me a little more about what you did?

Open end

Other Volunteering - Spouse
M42 RULE. WHETHER R ONLY, SPOUSE ONLY, OR BOTH VOLUNTEERED

R ONLY	SPOUSE ONLY	BOTH
GO TO M44 RULE	↓	

M43INTRO. [*SPOUSE ONLY-ANY M18, M23, M27, M31, M35, M39=YES*: Did / *ALL OTHERS*: During [PYEAR], did] [SPOUSE] do any **other** volunteering (through organizations) for purposes or activities that we have **not already mentioned**?]
  [*BOTH-ANY M18, M23, M27, M31, M35, M39=YES*: (And) did / *ALL OTHERS*: (And) during [PYEAR], did] [SPOUSE] do any **other** volunteering?]
  • IF necessary: This might be working a hotline, helping animals or the environment, supporting arts and cultural activity, or working in the community and neighborhood. Or **any other activities** such as serving on a board or a committee, doing office work, fund raising, organizing events, or consulting?

| 1. Yes | 5. No | → GO TO M44 RULE
|---|---|
| ↓ | |

M43OPEN. What were those volunteering activities? Can you tell me a little more about what [he / she] did?

Open end

Volunteering – R or Spouse Not Endorsed Earlier

M44 RULE. WHETHER WIFE/"WIFE" IN FU (WTRWQW=2, 3); WHETHER R ONLY (RVOL=1 & SVOL=0) OR SPOUSE ONLY (RVOL=0 & SVOL=1)VOLUNTEERED DURING PYEAR

WIFE/"WIFE" IN FU			NO WIFE/"WIFE" IN FU
R ONLY	SPOUSE ONLY	BOTH	GO TO M56A
↓ GO TO M56A			

M45. Now that you have had a chance to hear about the kinds of volunteer activity we are interested in, let me ask again about [*SP ONLY*: **your /** *R ONLY*: **SPOUSE's**] volunteering. During [PYEAR], did [you / he / she] do any of this kind of volunteering through organizations?

1. Yes 5. No → GO TO M56A
   ↓

M46. Was any of [your / his / her] volunteering at or through [your / his / her] place of worship?
   1. Yes 5. No

M47. (Was any of [your / his / her] volunteering through organizations that help **children and youth**?
   1. Yes 5. No

M48. (Was any of [your / his / her] volunteering through organizations that help **senior citizens?**
   1. Yes 5. No

M49. (Was any of [your / his / her] volunteering through organizations that help **people in poor health?**
   1. Yes 5. No

M50. (Was any of [your / his / her] volunteering through organizations that help **people in need of basic necessities**?
   1. Yes 5. No

M51. (Was any of [your / his / her] volunteering through organizations to bring about **social change**?
   1. Yes 5. No

M52. Did [you / he / she] do any volunteering (through organizations) for purposes or activities that we have **not already mentioned**?
   1. Yes 5. No → GO TO M56A
      ↓

   M52OPEN. What were those volunteering activities? Can you tell me a little bit more about what [you / he / she] did?
      Open end

Religious Attendance - Respondent

M56A. And finally, during the year **[PYEAR]**, on average, how often did you go to religious services?
   • ENTER amount here, then ENTER unit of time on next screen (Day, Week, Two weeks, Month, Year)
   0 → GO TO M57CKPT   1 – 97   DK/RF   → GO TO M57CKPT
      ↓

M56B. The amount entered is: [M56A] per _____
      • SELECT the unit of time below
      2. Day   3. Week   4. Two weeks   5. Month   6. Year
      7. Other-specify   → M56BSPEC. Specify. (String 100)

Religious Attendance - Spouse

M57CKPT. CAI CHECKPOINT: WHETHER WIFE/"WIFE" IN FU (CYFUHU=1, 4 & CYAQRTH=202, 222)

1. WIFE/"WIFE" IN FU	5. ALL OTHERS	→ GO TO IW END
↓		

M57A. During the year **[PYEAR]**, on average, how often did [SPOUSE] go to religious services?

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

0	→ GO TO IW END	1 – 99	DK/RF	→ GO TO IW END
	↓			

M57B. The amount entered is: [M57A] per _____

- SELECT the unit of time below

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

7. Other-specify	→ M57BSPEC. Specify. (String 100)

Interview End

Q1. Thank you, that concludes the interview portion of my call. Now, I just need to verify some information that will help us contact [*R=FU MEMBER*: you / *R=PROXY*: this family] in the future.
- ENTER [1] to continue

| 1. Continue |

Q2. IWER CHECKPOINT: SPANISH OR FOREIGN LANGUAGE USED
- Was SPANISH, or any OTHER FOREIGN language, used anywhere in this interview?

| 1. Yes, Spanish or Foreign Language Used | 5. No |