

## APPENDIX B1

### 1996 SIPP WAVE 5 CORE QUESTIONNAIRE

#### Major Sections

	<u>Page(s)</u>
Instrument Front	2-9
Noninterviews	10-14
Coverage Items	15-21
Household Demographics	22-49
Labor Force, Part 1- Identifying Employers, Businesses Owned, etc.	50-96
General Income, Part 1 - Identifying Sources of Income from Government Income Programs, Retirement Income Plans, and Other Income	97-128
Assets, Part 1 - Identifying Ownership of Income Producing Assets	129
Labor Force, Part 2 - Income Received from Jobs/Businesses	130-164
General Income, Part 2 - Amount Received from Incomes Reported in General Income, Part	165-209
Assets, Part 2 - Income Received from Assets Owned	210-221
Health Insurance	222-229
Education	230-236
Programs	237-242

**Instrument Front**

-----  
-HH\_COMP- This screen presents the current HH composition.

Number of persons in HH: \_\_\_\_\_  
Person currently interviewed: \_\_\_\_\_

		P S A	S A E R O
		A E G	M A R P F D A R
LN NAME	RELAT	R X E	S T A T N N U C I

-----  
1 FIRST AND LAST NAME

-----  
-HHLWAVE1- This screen presents the HH composition as of LAST wave.

Household telephone number: [AREA CODE PHONE NUMBER EXTENSION]  
Household address: [ADDRESS 1]  
[ADDRESS 2]  
[CITY, STATE ZIP]

Number of persons recorded in HH: [# OF PERSONS IN HH]

O		P S A	S
S		A E G	M A R P
P LN NAME	RELAT	R X E	S T A T N

-----  
x 1 FIRST AND LAST NAME  
x 2 FIRST AND LAST NAME  
x 3 FIRST AND LAST NAME

Respondent's

First Name	Middle Name	Last Name	Maiden Name	Other Name
------------	-------------	-----------	-------------	------------

-----  
-  
FIRST MIDDLE LAST NAME MAIDEN OTHER

JOB NAME = [NAME OF PERSONS'S JOB]  
BUSINESS NAME = [NAME OF PERSON'S BUSINESS]

O		P S A	S
S		A E G	M A R P
P LN NAME	RELAT	R X E	S T A T N

-----  
-----  
-CP\_SUM-

Household telephone number: [AREA CODE/PHONE/EXTENSION]

Household address: [ADDRESS 1]  
[ADDRESS 2]  
[CITY, STATE, ZIP]

HH Respondent: [FIRST AND LAST NAME]  
CONTACT PERSON INFORMATION FROM PREVIOUS WAVE  
CONTACT PERSON #1 NAME/ADDRESS:

[FIRST, MIDDLE, LAST NAME]  
[ADDRESS 1]  
[ADDRESS 2]  
[CITY]  
[STATE, ZIP]  
[RELATIONSHIP]

CONTACT PERSON TELEPHONE #: [AREA CODE/PHONE/EXTENSION]

CONTACT PERSON #2 NAME/ADDRESS:

[FIRST, MIDDLE, LAST NAME]  
[ADDRESS 1]  
[ADDRESS 2]  
[CITY]  
[STATE, ZIP]  
[RELATIONSHIP]

CONTACT PERSON TELEPHONE #: [AREA CODE/PHONE/EXTENSION]

- (1) Update Contact Person #1
  - (2) Update Contact Person #2
  - (P) PROCEED
-

-----  
-CP1- Enter name and address or (S) for SAME, if no change needed

Current name:

CPNAME1\_FN, CPNAME1\_LN [FIRST, LAST NAME]  
\_\_\_\_\_

Current address: [ADDRESS 1]

[ADDRESS 2]  
  
\_\_\_\_\_  
\_\_\_\_\_

[CITY, STATE, ZIP]  
\_\_\_\_\_

Current relation: [RELATIONSHIP]

Current telephone: [AREA CODE/PHONE/EXTENSION]  
\_\_\_\_\_

-----  
-CP2- Enter name and address or (S) for SAME, if no change needed

Current name:

[FIRST, LAST NAME]  
\_\_\_\_\_

Current address: [ADDRESS 1]

[ADDRESS 2]  
  
\_\_\_\_\_  
\_\_\_\_\_

[CITY, STATE, ZIP]  
\_\_\_\_\_

Current relation: [RELATIONSHIP]

Current telephone: [AREA CODE/ PHONE/ EXTENSION]  
\_\_\_\_\_

-----  
-START-

CENSUS CATI/CAPI SYSTEM

Date: 06-03-97

Ver: 1

SIPP

THE SURVEY OF INCOME AND PROGRAM PARTICIPATION

I\_PANEL Panel, Wave, I\_WAVE

PSU: \_\_\_\_\_

SEGMENT: \_\_\_\_\_

SERIAL: \_\_\_\_\_

CASE STATUS IS: [NEW CASE, NEED CC, NEED  
CORE, NEED CALLBACKS]

DATE IS: [MONTH, DAY]

APPOINTMENT: CALLBACK

TIME IS: [HHMM]

[DATE, TIME]

INTERVIEW MODE: [PERSONAL/TELEPHONE]

- (P) Proceed - PERSONAL INTERVIEW
  - (T) Telephone interview (goto Dial screen)
  - (A) Set appointment for visit or callback
  - (Q) Quit -- Do Not Attempt now
  - (R) Ready to transmit
- \_\_\_\_\_

-----  
-DIAL-

FR INSTRUCTION: PRESS SHIFT-F4 AND REVIEW HOUSEHOLD COMPOSITION  
BEFORE BEGINNING THE INTERVIEW

Dial this number: Area Code: Phone Number:

Secondary number: Area Code: Phone Number:

- (1) Someone answers - BEGIN INTERVIEW
  - (2) Someone answers - SET APPOINTMENT
  - (3) No contact - answer machine/busy/no answer
  - (4) New telephone number or telephone disconnected
  - (5) Not attempted now
- \_\_\_\_\_

-----  
-DASSIST- Enter address or (S) for SAME, if no change needed  
If HH has no telephone, enter N for the area code to proceed

FR INSTRUCTION: Call directory assistance in your area  
if necessary to obtain the correct telephone  
number for this household.

(PRESS SHIFT-F4 TO DISPLAY HOUSEHOLD ROSTER AND ADDRESS  
FROM PREVIOUS WAVE)

What is the new telephone number for the [PERSON'S/ HOUSEHOLD'S LAST NAME]  
household?

CURRENT TELPHONE NUMBER:

Area Code: Telephone: Extension:  
\_\_\_\_\_

-----  
-HHAPPT2-  
When would be a convenient time to conduct an  
interview with your household?

\_\_\_\_\_

-----  
-HHAPPT3-  
Before I go, let me verify some information:

Is your address still (READ ADDRESS BELOW) ?

Household address: [ADDRESS 1]  
[ADDRESS 2]  
[CITY, STATE, ZIP]

- (1) Yes
- (2) No
- (3) Address correction - HH did not move
- (Q) End interview

\_\_\_\_\_

-----  
-HHAPPT4- Enter address or (S) for SAME, if no change needed

Current listing: [ADDRESS 1]  
                  [ADDRESS 2]

\_\_\_\_\_  
\_\_\_\_\_

Current listing: [CITY]

\_\_\_\_\_

Current listing: [STATE]  
\_\_\_\_\_ (H) HELP

Current Listing: [ZIP]

\_\_\_\_\_

CURRENT TELEPHONE NUMBER:

Area Code: Telephone: Extension:

\_\_\_\_\_

-----  
-HHAPPT5-

FR INSTRUCTION: PRESS SHIFT-F4 TO DISPLAY PREVIOUS WAVE  
HOUSEHOLD ROSTER

I have listed (HOUSEHOLD ROSTER LIST) as living in this household.

Are ALL of these people still living here?

- (1) Yes
- (2) No

(Q) End interview

\_\_\_\_\_

-----  
-HHAPPT99-

Thank you for your assistance. I will visit your household  
on [APPOINTMENT DATE].

FR INSTRUCTION: This household has persons who have moved since  
the last interview; you may wish to review procedures  
for movers before the interview.

REMEMBER: deal with mover cases early in the month,  
so that you have sufficient time to locate and  
interview the people who moved.

PRESS ENTER TO CONTINUE  
—

-----  
-INTRO\_D-

Some of the questions have already been answered.  
Let me see where we should begin.

Item to begin: [LAST OPEN QUESTION]

PRESS ENTER TO CONTINUE  
—

-----  
-INTRO-

"Hello. I'm ... from the United States Bureau of the Census.  
(If personal visit, read: Here is my identification card (show ID card.)

Several months ago this household was contacted concerning a survey on the economic situation of people who live in the United States. I have some further questions to ask you."

Ask respondent if he/she received advance letter; if not, give letter to respondent before proceeding (if personal visit), or read/explain the letter to telephone respondents.

Is the respondent ready to complete the interview?

- (1) No - Inconvenient time.
- (2) No - Reluctant Respondent - Hold for refusal followup
- (3) Noninterview (Type A/B/C/D OR a mover noninterview)
- (4) Contacted Incorrect Household - END INTERVIEW

(P) Proceed \_\_\_\_

**Noninterviews**

-----  
-TYPEABC- ENTER NONINTERVIEW CODE

- |                        |   |
|------------------------|---|
| TYPE A                 | TYPE B  |
| (1) No one home        | (20) ENTIRE HH institutionalized              |
| (2) Temporarily absent |   |
| (3) Refused            | TYPE C  |
| (4) Language problem   | (29) ENTIRE HH deceased                       |
| (5) Other Type A       | (30) ENTIRE HH moved out of country           |
|                        | (31) ENTIRE HH on active duty in Armed Forces |

MOVER SITUATIONS

- (32) ENTIRE HH Moved to known address OUTSIDE of FR's area
- (33) ENTIRE HH Moved to known address WITHIN FR's area
- (34) ENTIRE HH merged with another SIPP HH
- (35) ENTIRE HH Moved and split into several new SIPP HH's
- (36) ENTIRE HH Moved - further work needed to obtain address
- (37) Other Type C

TYPE D

- (38) ENTIRE HH Moved, address unknown
- (39) ENTIRE HH Moved within US; RO determined case is outside SIPP limits \_\_\_\_

-----  
-BCINFO-

FR INSTRUCTION:

For Type B and C noninterviews, collect the following information.

Date the household left sample: Month: \_\_\_\_\_ Day: \_\_\_\_\_

Name of person providing noninterview status  
FR NOTE: Enter "BYOBS" if determined by observation

\_\_\_\_\_

Telephone number of person listed above:

Area Code: \_\_\_\_\_

Number: \_\_\_\_\_

Extension: \_\_\_\_\_

-----  
-SPECIFY-

Specify the kind of "Other" Noninterview

\_\_\_\_\_

-----  
-TYPC\_OTH-

Specify the kind of "Other" Noninterview

—

-----  
-NI\_RACE-

Enter the Race of the reference person

- (1) White
- (2) Black
- (3) American Indian, Aleut or Eskimo
- (4) Asian or Pacific Islander
- (5) Other
- (D) Don't Know

—

-----  
-NI\_SEX-

Enter the Sex of the reference person

- (1) Male
- (2) Female

—

-----  
-NI\_SIZE-

ASK OR VERIFY WITH SOME KNOWLEDGEABLE INDIVIDUAL

Enter the total number of people in the household.  
Count all children and adults.

—

-----  
-NI\_TENUR-

Are the living quarters --

- (1) Owned or being bought by the occupant(s)
- (2) Rented for cash
- (3) Occupied without payment of cash rent

—

-----  
-CC02AB-

FR NOTE: Please be sure to complete a Type A and D Information  
Sheet for this case.

PRESS ENTER TO CONTINUE  
—

-----  
-TYPEADIS-

\*\* NOTE TO FR \*\*

PLEASE DISCUSS THIS CASE WITH YOUR SUPERVISOR  
BEFORE DESIGNATING IT AS A TYPE A NONINTERVIEW.

PRESS ENTER TO CONTINUE

-----  
-GET\_NEWAD1-

ASK OR VERIFY

Can you give me the new address of the individuals who  
lived in this household?

- (1) Yes
  - (2) No / Address not available yet
-

-----  
-GET\_NEWAD2-

IF ANY PART OF THE ADDRESS IS UNKNOWN OR BLANK,  
PRESS ENTER TO LEAVE THOSE FIELDS BLANK.

What is the new address for these persons?

STREET ADDRESS: \_\_\_\_\_  
\_\_\_\_\_

CITY: \_\_\_\_\_ COUNTY: \_\_\_\_\_

STATE: \_\_\_\_\_ (H) HELP

ZIP CODE: \_\_\_\_\_

TELEPHONE NUMBER:

AREA CODE: \_\_\_\_\_

TELEPHONE: \_\_\_\_\_

EXTENSION: \_\_\_\_\_

-----  
-ALFTDATE-

DATE OF LAST INTERVIEW: [MONTH 5]

When did these persons leave?

ENTER NUMERIC VALUES FOR MONTH AND DAY

MONTH: \_\_\_\_\_

DAY: \_\_\_\_\_

-----  
-AVERDATE-

I would like to verify that  
these persons left before [MONTH1] 1st.  
Is that correct?

(1) Yes

(2) No

\_\_\_\_\_

-----  
-ARSNLFT-

Why did these persons leave the household?

ENTER ALL THAT APPLY - ENTER (N) AFTER LAST  
ENTRY IF LESS THAN 3 REASONS

- (5) Separation or divorce
- (6) Marriage
- (7) Became employed/unemployed
- (8) Due to job change - other
- (10) Other

— — —

-----  
-ALFTMAIN-

What is the main reason these persons  
left the household?

[REASON 1]  
[REASON 2]  
[REASON 3]

—

## Coverage Items

---

### -VERADD-

What is your exact address?

ADDRESS: [ADDRESS 1]  
[ADDRESS 2]  
[CITY, STATE, ZIP]

- (1) Address correct as listed
  - (2) Some additions/changes to address are needed
- 

### -ADDWARN-

FR INSTRUCTION:

If the entire household has moved to a new address, DO NOT use the address change screen. Entire-household mover cases should be spawned from the TYPEABC screen. Enter (S) at the prompt to spawn a mover case (or cases).

Use the address change screen ONLY to make minor changes to the household's basic address. Enter (P) at the prompt to proceed to the address change screen.

If there are no changes to the household's address, enter (N) at the prompt to proceed to the next question.

- (N) No changes needed
  - (S) Spawn mover case(s) from TYPEABC screen
  - (P) Proceed to the address change screen
-

-----  
-CHGADD- Enter address or (S) for SAME, if no change needed

Current listing: [ADDRESS 1]  
                  [ADDRESS 2]

\_\_\_\_\_  
\_\_\_\_\_

Current listing: [CITY]

\_\_\_\_\_

Current listing: [STATE]

\_\_\_\_\_ (H) HELP

Current Listing: [ZIPCODE]

\_\_\_\_\_

CURRENT TELEPHONE NUMBER:

Area Code: Telephone: Extension:

\_\_\_\_\_

-----  
-VCOUNTY-

ASK OR VERIFY:

In what county is this address located?

Current listing: [COUNTY]

(S) for SAME

\_\_\_\_\_

-----  
-MAILADDR-

Is this also your mailing address?

ADDRESS: [ADDRESS 1]  
          [ADDRESS 2]  
          [CITY, STATE, ZIP]

- (1) Yes
- (2) No

—

-----  
-CHGMAIL-

Enter corrected mailing address or (S) for SAME if correct

Current listing: [ADDRESS 1]  
                  [ADDRESS 2]

\_\_\_\_\_  
\_\_\_\_\_

Current listing: [CITY]

\_\_\_\_\_

Current listing: [STATE]  
\_\_\_\_\_ (H) HELP

Current Listing: [ZIP]

\_\_\_\_\_

-----  
-ACCESS-

\*\* DO NOT READ TO RESPONDENT \*\*

IS ACCESS TO THIS UNIT

- (1) Direct
- (2) Through another unit

—

---

-UNIT\_CMB-

\*\* DO NOT READ TO RESPONDENT \*\*

This household must be combined with the household through which access is gained. Determine if the household is in or out of the SIPP sample.

- (1) Combined with HH in SIPP sample
  - (2) Combined with HH NOT in SIPP sample
- 

---

-LIVQRT-

\*\* DO NOT READ TO RESPONDENT \*\*

Enter type of living quarters

HOUSING UNIT

- (1) House, apartment, flat
- (2) HU in nontransient hotel, motel, etc.
- (3) HU permanent, in transient hotel, motel, etc.
- (4) HU in rooming house
- (5) Mobile home or trailer with NO permanent room added
- (6) Mobile home or trailer with one or more permanent rooms added
- (7) HU not specified above

GROUP QUARTERS UNIT

- (8) Quarters not HU in rooming or boarding house
  - (9) Unit not permanent in transient hotel, motel, etc.
  - (11) Student quarters in college dormitory
  - (12) OTHER GROUP QUARTERS UNIT not specified above
-

---

-UNITS-

ASK IF NOT APPARENT

How many housing units, both occupied and vacant,  
are there in this structure?

- (1) One, detached
  - (2) One, attached
  - (3) Two
  - (4) 3-4
  - (5) 5-9
  - (6) 10-19
  - (7) 20-49
  - (8) 50 or more
- 

---

-BEGIN-

I'm ready to begin the interview with questions about who lives here, their ages, how they're related to each other, and other information of that sort. Then, I will ask questions about your jobs and any other sources of income.

First, I will ask you about YOURSELF and then I'll need to interview any other adults in the household.

PRESS ENTER TO CONTINUE

—

---

-VERMAIL-

Is your mailing address:

ADDRESS: [MAILING ADDRESS 1]  
[MAILING ADDRESS 2]  
[CITY, STATE, ZIPCODE]

- (1) Yes
- (2) No

-----  
-CHVMAIL-

Enter corrected mailing address or (S) for SAME if correct

Current listing: [MAILING ADDRESS 1]  
[MAILING ADDRESS 2]

-----  
-----  
Current listing: [CITY]

-----  
Current listing: [STATE]  
----- (H) HELP

Current Listing: [ZIPCODE]  
-----

-----  
-TENURE-

Are your living quarters --

- (1) Owned or being bought by you or someone  
in your household
- (2) Rented for cash
- (3) Occupied without payment of cash rent

-----  
-VERFYTEN-

Previously, we recorded that your living quarters were  
[OWNED OR BEING BOUGHT/ RENTED FOR CASH/ OCCUPIED WITHOUT  
PAYMENTS OF CASH RENT]

Is that correct?

- (1) Yes
  - (2) No
-

-----  
-NEWTEN-

ENTER CORRECT LIVING QUARTERS STATUS

- (1) Owned or being bought by you or someone  
in your household
- (2) Rented for cash
- (3) Occupied without payment of cash rent

—

-----  
-PUBHSE-

Is this residence in a public housing project, that is,  
is it owned by a local housing authority?

- (1) Yes
- (2) No
- (D) Don't Know

—

-----  
-GVTRNT-

Is the Federal, State or local government paying part  
or all of the rent for this residence?

- (1) Yes
- (2) No
- (D) Don't Know

—

## Household Demographics

---

-STLLIV-

During our last interview we listed (READ ROSTER NAMES)  
as living at this residence. Do all of these people  
live here now?

- (1) Yes
- (2) No

—

---

-NOTLIV-

Which of these persons do not live here now?  
ENTER LINE NUMBER OF PERSON WHO LEFT HOUSEHOLD

—

---

-LFTDATE-

DATE OF LAST INTERVIEW: [LAST INTERVIEW MONTH]

When did [FIRST AND LAST NAME] leave?  
ENTER NUMERIC VALUES FOR MONTH AND DAY  
IF "PREVIOUSLY LISTED IN ERROR", ENTER (0)

MONTH: \_\_  
DAY: \_\_

---

-VERDATE-

I would like to verify that  
[FIRST AND LAST NAME] left before [FIRST MONTH  
OF REFERENCE PERIOD].

Is that correct?

- (1) Yes
- (2) No

—

-----  
-RSNLFT-

Why did this person leave the household.  
ENTER ALL THAT APPLY - ENTER (N) AFTER LAST  
ENTRY IF LESS THAN 3 REASONS

- (1) Deceased
- (2) Institutionalized
- (3) On active duty in the Armed Forces
- (4) Moved outside of U.S.
- (5) Separation or divorce
- (6) Marriage
- (7) Became employed/unemployed
- (8) Due to job change - other
- (9) Listed in error in prior wave
- (10) Other

\_1 \_2 \_3

-----  
-LFTMAIN-

What is the main reason this person  
left the household?

[REASON 1]  
[REASON 2]  
[REASON 3]

-

-----  
-WHOELSE-

ASK IF NECESSARY:  
Did anyone else who lived here last time go  
to live with (READ NAME(S))

- (1) Yes
- (2) No

-

-----  
-NEWADD- What is the new address for .... (READ NAMES)

FR: Do you know the new address?

- (1) Yes
- (2) No \_

Number and Street:

\_\_\_\_\_  
\_\_\_\_\_

City: \_\_\_\_\_ County: \_\_\_\_\_

State: \_\_\_\_\_ (H) HELP

ZIP: \_\_\_\_\_ - \_\_\_\_\_

TELEPHONE NUMBER:

AREA CODE: \_\_\_\_\_

TELEPHONE: \_\_\_\_\_ - \_\_\_\_\_

EXTENSION: \_\_\_\_\_

-----  
-FRAREA-

QUESTION TO FR:

Is this address within your interview area?

- (1) Yes
- (2) No
- (3) Further work needed to obtain address

—

-----  
-MORLEAV-

Is anyone else who lived here last time  
currently not living here?

- (1) Yes
- (2) No

—

---

-NEWMBR-

Is anyone else living or staying here now,  
who I have not listed, including any newborn  
babies?

- (1) Yes
- (2) No

—

---

-FMRMBR-

FR NOTE:

Is the new household member on the list  
of former household members listed above?

If so, enter the person number of the person.  
Otherwise, enter (N).

—

---

-MOREFMR-

Did anyone else on this list rejoin this household?

- (1) Yes
- (2) No

—

---

-ADDFMR-

Enter the line number or  
(N) for NO MORE

—

---

-MORJOIN-

Is there anyone else living or staying here now,  
who I have not listed?

- (1) Yes
- (2) No

-----  
-NEWNAME-

What is the name of the new person?

Please include middle and maiden names.

PRESS ENTER IF NO MIDDLE OR MAIDEN NAME

FIRST NAME \_\_\_\_\_  
MIDDLE NAME \_\_\_\_\_  
LAST NAME \_\_\_\_\_  
MAIDEN NAME \_\_\_\_\_

Have they ever gone by any other last name?

PRESS ENTER IF NO OTHER LAST NAME

OTHER NAME \_\_\_\_\_

-----  
-NEWRES-

Does this person usually live here?

(1) Yes

(2) No

—

-----  
-NEWURE-

Does [FIRST AND LAST NAME] have some other residence where he/she usually lives?

(1) Yes

(2) No

—

-----  
-NOLIST-

Since [FIRST AND LAST NAME] do not usually live here and has another residence, they will not be included in this survey.

PRESS (P) TO PROCEED

-----  
-ENTDATE-

When did [FIRST AND LAST NAME] begin living here?

ENTER NUMERIC VALUES FOR MONTH AND DAY.  
ENTER (B) IF PERSON LIVED AT THIS ADDRESS BEFORE  
SAMPLE PERSON(S) ENTERED

MONTH \_\_  
DAY \_\_

-----  
-VERDAT-

I would like to verify that [FIRST AND LAST NAME]  
joined this household before [FIRST MONTH OF REFERENCE  
PERIOD] 1st. Is that correct?

- (1) Yes
- (2) No

—

-----  
-RSNENT-

Why did [FIRST AND LAST NAME] join  
this household?

- (1) Birth
- (2) Marriage
- (4) Due to separation or divorce
- (5) From an institution
- (6) From Armed Forces barracks
- (7) From outside the U.S.
- (9) Became employed/unemployed
- (10) Job change - other
- (11) Lived at this address before sample person(s) entered
- (12) Other

(N) No more

\_1 \_2 \_3

-----  
-ENTMAIN-

What was the main reason [FIRST AND LAST  
NAME] entered the household?

[REASON 1]  
[REASON 2]  
[REASON 3]

-

-----  
-NEWSEX-

ASK IF NOT APPARENT:

Is person Male or Female?

(1) Male  
(2) Female

-

-----  
-HHRESP-

WARNING: THIS PERSON MUST BE 15 YEARS OF AGE OR OLDER  
ASK IF NECESSARY: With whom am I speaking?  
ENTER LINE NUMBER

-

-----  
-SEXCHG-

\*\* REVIEW THE ROSTER -

IF ALL SEX ENTRIES ARE CORRECT,  
PRESS (P) TO PROCEED;  
IF ANY SEX ENTRIES ARE INCORRECT,  
PRESS (C) TO MAKE CHANGES. \*\*

(P) Proceed  
(C) Make Changes

\_\_\_\_\_

-----  
-SEXCHG1-

ENTER ONLY THE LINE NUMBER  
OF THE PERSON NEEDING THE  
CHANGE -

ENTER (N) WHEN ALL CHANGES  
ARE COMPLETE

—

-----  
-RPCHECK-

\*\* REVIEW THE ROSTER -

IF THE REFERENCE PERSON  
INFORMATION IS CORRECT,  
PRESS (P) TO PROCEED;

IF THE REFERENCE PERSON  
INFORMATION IS INCORRECT,  
OR IF THE RELATIONSHIPS  
TO THE REFERENCE PERSON  
ARE INCORRECT, PRESS (C)  
TO MAKE CHANGES. \*\*

(P) Proceed

(C) Make Changes

—

-----  
-NEWRP-

FR NOTE:

Last time we recorded that [FIRST AND LAST NAME]  
was the person or one of the persons who owned or rented  
the home. [PREVIOUS REFERENCE PERSON] no longer lives here.

Who owns or rents this home?

WARNING: THIS PERSON MUST BE 15 YEARS OF AGE OR OLDER

ENTER LINE NUMBER \_

---

-NEWRP2-

FR NOTE:

Last time we recorded that [FIRST AND LAST NAME]  
was the person or one of the persons who owned or rented the home.  
[PREVIOUS REFERENCE PERSON] no longer lives here.

Who owns or rents this home?

WARNING: THIS PERSON MUST BE 15 YEARS OF AGE OR OLDER  
ENTER LINE NUMBER \_

---

-NEWRP3-

FR NOTE:

Last time we recorded that [FIRST AND LAST NAME]  
owned or rented the home.

Now that your address has changed, I need to know who is the person or persons  
who owns or rents this home.

- (1) Yes, same person owns/rents home
- (2) No, someone else owns/rents home

—

---

-NEWRP4-

Who owns or rents this home?

WARNING: THIS PERSON MUST BE 15 YEARS OF AGE OR OLDER  
ENTER LINE NUMBER \_

-----  
-NEWRRP-

Please turn to flashcard A.

Which one of the responses listed best describes your relationship to [REFERENCE PERSON]?

- (20) Spouse (Husband/Wife)
- (21) Unmarried Partner
- (22) Child
- (23) Grandchild
- (24) Parent (Mother/Father)
- (25) Brother/Sister
- (26) Other Relative of Reference Person  
(Uncle, cousin, mother-in-law, father-in-law, etc.)
- (27) Foster Child
- (28) Housemate/Roommate
- (29) Roomer/Boarder
- (30) Other Non-Relative of Reference Person \_\_\_\_

-----  
-SPOUSE1- DO NOT READ TO RESPONDENT UNLESS NECESSARY

Is one of the following SEX entries incorrect?

LINE	[REFERENCE PERSON]	SEX
LINE	[SPOUSE]	SEX

- (1) To correct [REFERENCE PERSON]'s SEX entry
- (2) To correct [SPOUSE]'s SEX entry
- (3) Neither sex entry is incorrect

—

-----  
-SPOUSE2-

You said [FIRST AND LAST NAME] is your spouse.  
Is that correct?

- (1) Yes
- (2) No

—

-----  
-SPOUSE3- DO NOT READ TO RESPONDENT UNLESS NECESSARY  
Earlier I recorded [FIRST AND LAST NAME] was their spouse.

You have just reported [FIRST AND LAST NAME] is also their spouse.

Which is correct?

- (1) [FIRST'S FIRST AND LAST NAME] is the correct spouse. Change relationship entry of [SECOND'S FIRST AND LAST NAME]
  
- (2) [SECOND'S FIRST AND LAST NAME] is the correct spouse. Change relationship entry of [FIRST'S FIRST AND LAST NAME]

—

-----  
-SPOUSE4-

Please turn to flashcard A.  
What is their relationship to?

- (22) Child
- (23) Grandchild
- (24) Parent (Mother/Father)
- (25) Brother/Sister
- (26) Other Relative of Reference Person  
(Uncle, cousin, mother-in-law, father-in-law, etc.)
- (27) Foster Child
- (28) Housemate/Roommate
- (29) Roomer/Boarder
- (30) Other Non-Relative of Reference Person \_\_\_\_

-----  
-DAD1-

You have reported both [FIRST'S FIRST AND LAST NAME]  
and [SECOND'S FIRST AND LAST NAME] are parents of  
[FIRST AND LAST NAME]

Is that correct?

- (1) No, change relationship to reference person code for  
[FIRST'S FIRST AND LAST NAME]
- (2) No, change relationship to reference person code for  
[SECOND'S FIRST AND LAST NAME]
- (3) Yes, this is correct.  
(One is natural father, one is step-father, for example)

—

-----  
-DAD2-

Please look at flashcard A.  
What is their relationship to ?

- (21) Unmarried Partner
- (22) Child
- (23) Grandchild
- (24) Parent (Mother/Father)
- (25) Brother/Sister
- (26) Other Relative of Reference Person  
(Uncle, cousin, mother-in-law, father-in-law, etc.)
- (27) Foster Child
- (28) Housemate/Roommate
- (29) Roomer/Boarder
- (30) Other Non-Relative of Reference Person \_\_\_\_

-----  
-MOM1-

You have reported both [FIRST'S FIRST AND LAST NAMES]  
and [SECOND'S FIRST AND LAST NAME] are parents  
of [FIRST AND LAST NAME]

Is that correct?

- (1) No, change relationship to reference person code for  
[FIRST'S FIRST AND LAST NAME]
- (2) No, change relationship to reference person code for  
SECOND'S FIRST AND LAST NAME]
- (3) Yes, this is correct.

(One is natural mother, one is step-mother, for example)

—

-----  
-MOM2-

Please look at flashcard A.  
What is their relationship to?

- (21) Unmarried Partner
- (22) Child
- (23) Grandchild
- (24) Parent (Mother/Father)
- (25) Brother/Sister
- (26) Other Relative of Reference Person  
(Uncle, cousin, mother-in-law, father-in-law, etc.)
- (27) Foster Child
- (28) Housemate/Roommate
- (29) Roomer/Boarder
- (30) Other Non-Relative of Reference Person \_

---

-RPDAD-

I've recorded that [FIRST AND LAST NAME] is [FIRST AND LAST NAME]'S father. Is [FIRST AND LAST NAME] his biological, step, adopted or foster child?

- (1) Biological or natural
  - (2) Stepchild
  - (3) Adopted child
  - (4) Foster child
- 

---

-RPDAD2-

Is [FIRST AND LAST NAME] also his adopted child?

- (1) Yes
  - (2) No
- 

---

-RPMOM-

I've recorded that [FIRST AND LAST NAME] is [FIRST AND LAST NAME 's] mother. Is [FIRST AND LAST NAME] her biological, step, adopted or foster child?

- (1) Biological or natural
  - (2) Stepchild
  - (3) Adopted child
  - (4) Foster child
- 

---

-RPMOM2-

Is [FIRST AND LAST NAME] also her adopted child?

- (1) Yes
  - (2) No
-

-----  
-INTROCC-

Now I will briefly review a little information about  
the people who live here.

PRESS ENTER TO CONTINUE

—

-----  
-AGECHK-

I have listed that [FIRST AND LAST NAME] age is  
[CURRENT AGE]  
Is that correct?

- (1) Yes
  - (2) No
- 

-----  
-NUBDAY-

What is [FIRST AND LAST NAME]'s date of birth?

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

BIRTH MONTH

PREVIOUS ANSWER: [BIRTH MONTH]

—

DAY OF MONTH

PREVIOUS ANSWER: [BIRTH DAY]

—

BIRTH YEAR

PREVIOUS ANSWER: [BIRTH YEAR]

—

-----  
-DOB-

What is [FIRST AND LAST NAME]'s date of birth?

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

ENTER MONTH:     \_\_\_

ENTER DAY:        \_\_\_

ENTER 4 DIGIT YEAR:   \_\_\_

-----  
-DOBA-

Would you say [FIRST AND LAST NAME] is:

- (1) [COMPUTED AGE] years of age?
- (2) [COMPUTED AGE PLUS 1 YEAR MORE] years of age?
- (N) Neither is correct

—

-----  
-VERAGE-

That would make [FIRST NAME AND LAST NAME] [AGE].  
Is that correct?

- (1) Yes, age is correct
- (2) No, age is not correct

—

-----  
-AGEGES-

ENTER YOUR BEST ESTIMATE OF  
[FIRST AND LAST NAME] AGE:

—

---

-OLDMS-

Last time I recorded [FIRST AND LAST NAME]  
marital status as [MARITAL STATUS].  
Is that [HIS/HER] current marital status?

- (1) Yes
- (2) No

—

---

-OLDSP-

Last time I recorded that [FIRST AND LAST NAME] was  
married to [FIRST AND LAST NAME]. Is that currently correct?

- (1) Yes
- (2) No

—

---

-MS-

What is [FIRST AND LAST NAME]'s current Marital Status?

- (2) Married, SPOUSE ABSENT
- (3) Widowed
- (4) Divorced
- (5) Separated
- (6) Never married

—

---

-LNSP-

ENTER LINE NUMBER OF [FIRST AND LAST NAME] SPOUSE.  
ASK IF NECESSARY

- (N) No one listed

—

-----  
-SPSSX1- (DO NOT READ TO RESPONDENT UNLESS NECESSARY)

Is one of the following SEX entries incorrect?

LINE	PERSON	SEX
LINE	OTHER PERSON	SEX

- (1) To correct [PERSON NUMBER]'s SEX entry
- (2) To correct [SPOUSE]'s SEX entry
- (3) Neither SEX entry is incorrect

—

-----  
-SPSSX2-

You said [OTHER PERSON]  
is [FIRST AND LAST NAME]'s spouse.  
Is that correct?

- (1) Yes
- (2) No

—

-----  
-EVRWID-

HAS [FIRST AND LAST NAME] ever been widowed?

- (1) Yes
- (2) No

—

-----  
-EVRDIV-

HAS [FIRST AND LAST NAME] ever been divorced?

- (1) Yes
- (2) No

—

-----  
-AFEVER-

Did [FIRST AND LAST NAME] ever serve  
on active duty in the U.S. Armed Forces?

- (1) Yes
- (2) No

—

-----  
-AFWHEN-

When did [FIRST AND LAST NAME] serve on active duty?

ENTER AS MANY TIME PERIODS AS APPLY.  
ENTER (N) AFTER LAST REPORTED PERIOD.

FR PROMPT AFTER FIRST RESPONSE:

Did [FIRST AND LAST NAME] serve on active duty any other times?

- (1) [AUGUST 1990 TO PRESENT (INCLUDING PERSIAN GULF WAR)]
- (2) [SEPTEMBER 1980 TO JULY 1990]
- (3) [MAY 1975 TO AUGUST 1980]
- (4) [ VIETNAM ERA (AUG.'64 - APRIL '75)]
- (5) OTHER SERVICE (ALL OTHER PERIODS)]

\_AFSRV1 \_AFSRV2 \_AFSRV3 \_AFSRV4 \_AFSRV5

-----  
-AFNOW-

IS [FIRST AND LAST NAME]  
now on active duty in the Armed Forces?

- (1) Yes
- (2) No

—

-----  
-OLDED-

I have recorded that [FIRST AND LAST NAME]  
highest level of school completed or  
highest degree received is:  
[LEVEL OF SCHOOL COMPLETED]  
[PROGRAM COMPLETED]  
Is that still correct?

- (1) Yes
- (2) No

—

-----  
-EDUCA- SHOW FLASHCARD B

What is the highest level of school [FIRST AND LAST NAME]  
has completed or the highest degree received?

- (31) Less than 1st grade
- (32) 1st,2nd,3rd or 4th grade
- (33) 5th or 6th grade
- (34) 7th or 8th grade
- (35) 9th grade
- (36) 10th grade
- (37) 11th grade
- (38) 12th grade, no diploma
- (44) Bachelors degree  
(For example: BA, AB, BS)
- (45) Master's degree (For example:  
MA, MS, MEng, MEd, MSW, MBA)
- (46) Professional School Degree (For  
example: MD,DDS,DVM,LLB,JD)
- (47) Doctorate degree  
(For example: PhD, EdD)
- (39) HIGH SCHOOL GRADUATE - high school DIPLOMA  
or equivalent (For example: GED)
- (40) Some college but no degree
- (41) Diploma or certificate from a vocational,technical,  
trade or business school beyond the High School level
- (42) Associate degree in college - Occupational/vocational program
- (43) Associate degree in college - Academic program

-----  
-EDUCB-

HAS [FIRST AND LAST NAME] completed high school by  
means of a GED or other equivalency test or program?

- (1) Yes
- (2) No

—

-----  
-LNMOM-

Is [FIRST AND LAST NAME] mother a member of this household?

IF NO, ENTER (N)

IF YES, ENTER THE MOTHERS LINE NUMBER

—

-----  
-TYPMOM-

[PARENT'S FIRST AND LAST NAME] is the parent.

IS [FIRST AND LAST NAME] her  
biological, step, adopted or foster child?

- (1) Biological or natural
  - (2) Stepchild
  - (3) Adopted child
  - (4) Foster child
- 

-----  
-TYPMOM2-

IS [FIRST AND LAST NAME] also  
[PARENT'S FIRST AND LAST NAME]'s adopted child?

- (1) Yes
  - (2) No
- 

-----  
-LNDAD-

Is [FIRST AND LAST NAME] father a member of this household?

IF NO, ENTER (N)

IF YES, ENTER THE FATHERS LINE NUMBER

—

---

-TYPDAD-

[PARENT'S FIRST AND LAST NAME] is the parent.

IS [FIRST AND LAST NAME] his  
biological, step, adopted or foster child?

- (1) Biological or natural
- (2) Stepchild
- (3) Adopted child
- (4) Foster child

—

---

-TYPDAD2-

IS [FIRST AND LAST NAME] also  
[PARENT'S FIRST AND LAST NAME]'s adopted child?

- (1) Yes
- (2) No

—

---

-STEPDAD-

Is [FIRST AND LAST NAME] also his stepchild?

- (1) Yes
- (2) No

—

---

-STEPMOM-

Is [FIRST AND LAST NAME] also her stepchild?

- (1) Yes
- (2) No

—

-----  
-OLDGRD-

I have listed that [ADULT'S FIRST AND LAST NAME] is  
[FIRST AND LAST NAME] guardian.

Is that correct ?

- (1) Yes
- (2) No

—

-----  
-LNGD-

Who in this household is responsible for  
[FIRST AND LAST NAME]?

Enter (N) if not listed below.

—

-----  
-NEWRACE-

IF PERSONAL VISIT, SHOW FLASHCARD C

Which of the categories (on this card) best  
describes [FIRST AND LAST NAME'S] race?

IF TELEPHONE INTERVIEW, READ CATEGORIES TO RESPONDENT

- (1) White
- (2) Black
- (3) American Indian, Aleut, or Eskimo
- (4) Asian or Pacific Islander
- (5) Other Race

—

-----  
-OTHRAC-

Enter the specific race reported.

\_\_\_\_\_

-----  
-ORIGIN- IF PERSONAL VISIT, SHOW FLASHCARD D

What is [FIRST AND LAST NAME'S] origin or descent?

(READ CATEGORIES IF NECESSARY FOR TELEPHONE INTERVIEWS)

- |                     |                         |                               |
|---------------------|-------------------------|-------------------------------|
| (1) Canadian        | (20) Mexican            | (30) African-American or      |
| (2) Dutch           | (21) Mexican-American   | Afro-American                 |
| (3) English         | (22) Chicano            | (31) American Indian,         |
| (4) French          | (23) Puerto Rican       | Eskimo or Aleut               |
| (5) French-Canadian | (24) Cuban              | (32) Arab                     |
| (6) German          | (25) Central American   | (33) Asian                    |
| (7) Hungarian       | (26) South American     | (34) Pacific Islander         |
| (8) Irish           | (27) Dominican Republic | (35) West Indian              |
| (9) Italian         | (28) Other Hispanic     |                               |
| (10) Polish         |                         | (39) Another group not listed |
| (11) Russian        |                         |                               |
| (12) Scandinavian   |                         | (40) American                 |
| (13) Scotch-Irish   |                         |                               |
| (14) Scottish       |                         |                               |
| (15) Slovak         |                         |                               |
| (16) Welsh          |                         |                               |
| (17) Other European | —                       |                               |

-----  
-SSN-

What is [FIRST AND LAST NAME]

Social Security or Railroad Retirement Number?

(N) None -- Doesn't have an SSN or RRN

\_\_\_\_ - \_\_\_\_ - \_\_\_\_\_

-----  
-CBSSN-

This information is especially important to the survey.

If I were to call you later do you think I might be able to get the information then?

- (1) Yes
- (2) No

—

-----  
-CHANGE- FR NOTE: PLEASE VERIFY THE INFORMATION DISPLAYED IS CORRECT;  
REVIEW AND MAKE ANY CORRECTIONS AS NEEDED. IF ANY  
INFORMATION APPEARS TO BE INCORRECT, ASK:

I need to verify some of the information I have  
collected for READ ROSTER NAME....

(P) All correct - Proceed

OR Enter LINE NUMBER of person needing a CHANGE \_

PRESS "SHIFT-F6" TO DISPLAY FULL ROSTER IF NEEDED

-----  
-CHG\_WHAT- What change is needed for: [DEMOGRAPHIC ITEMS]

(M) Mistake -- no changes needed (4) Race

(2) Name

(5) Origin

(3) Educational attainment

(6) Social Security Number \_

PRESS "SHIFT-F6" TO DISPLAY FULL ROSTER IF NEEDED

-----  
-FIXNAME-

What is the name of the person living or staying  
here? Please include middle and maiden names.

PRESS ENTER IF NO MIDDLE OR MAIDEN NAME

FIRST NAME \_\_\_\_\_

MIDDLE NAME \_\_\_\_\_

LAST NAME \_\_\_\_\_

MAIDEN NAME \_\_\_\_\_

Has he/she ever gone by any other last name?

PRESS ENTER IF NO "OTHER" NAME

OTHER NAME \_\_\_\_\_

-----  
-FIXEDUC- [bold]SHOW FLASHCARD B

What is the highest level of school [FIRST AND LAST NAME]  
has completed or the highest degree he/she has received?

- (31) Less than 1st grade
- (32) 1st,2nd,3rd or 4th grade
- (33) 5th or 6th grade
- (34) 7th or 8th grade
- (35) 9th grade
- (36) 10th grade
- (37) 11th grade
- (38) 12th grade, no diploma
- (44) Bachelors degree  
(For example: BA, AB, BS)
- (45) Master's degree (For example:  
MA, MS, MEng, MEd, MSW, MBA)
- (46) Professional School Degree (For  
example: MD,DDS,DVM,LLB,JD)
- (47) Doctorate degree  
(For example: PhD, EdD)
- (39) HIGH SCHOOL GRADUATE - high school DIPLOMA  
or equivalent (For example: GED)
- (40) Some college but no degree
- (41) Diploma or certificate from a vocational,technical,  
trade or business school beyond the High School level
- (42) Associate degree in college - Occupational/vocational program
- (43) Associate degree in college - Academic program

-----  
-FIX\_ED\_B-

Has [FIRST AND LAST NAME] completed high school by  
means of a GED or other equivalency test or program?

- (1) Yes
  - (2) No
- 

-----  
-FIXRACE- SHOW FLASHCARD C

Which of the categories on this card best describes  
[FIRST AND LAST NAME'S] race?

- (1) White
  - (2) Black
  - (3) American Indian, Aleut, or Eskimo
  - (4) Asian or Pacific Islander
  - (5) Other Race
-

-----  
-FIX\_ORAC-

Enter the specific race reported.

\_\_\_\_\_

-----  
-FIXORIG- SHOW FLASHCARD D

Which of the categories on this card best describes  
[FIRST AND LAST NAME] origin or descent?

- |                     |                         |                               |
|---------------------|-------------------------|-------------------------------|
| (1) Canadian        | (20) Mexican            | (30) African-American or      |
| (2) Dutch           | (21) Mexican-American   | Afro-American                 |
| (3) English         | (22) Chicano            | (31) American Indian,         |
| (4) French          | (23) Puerto Rican       | Eskimo or Aleut               |
| (5) French-Canadian | (24) Cuban              | (32) Arab                     |
| (6) German          | (25) Central American   | (33) Asian                    |
| (7) Hungarian       | (26) South American     | (34) Pacific Islander         |
| (8) Irish           | (27) Dominican Republic | (35) West Indian              |
| (9) Italian         | (28) Other Hispanic     |                               |
| (10) Polish         |                         | (39) Another group not listed |
| (11) Russian        |                         |                               |
| (12) Scandinavian   |                         | (40) American                 |
| (13) Scotch-Irish   |                         |                               |
| (14) Scottish       |                         |                               |
| (15) Slovak         |                         |                               |
| (16) Welsh          |                         |                               |
| (17) Other European | _____                   |                               |

-----  
-FIXSSN-

What is [FIRST AND LAST NAME]  
Social Security or Railroad Retirement Number?

(N) None -- Doesn't have an SSN or RRN

\_\_\_\_ - \_\_\_\_ - \_\_\_\_\_

-----  
-CHG\_MORE- Are any more changes needed for: [DEMOGRAPHIC ITEMS]

- (1) Yes  
(2) No \_

---

-FALLOUT-

FR INSTRUCTION:

ALL HOUSEHOLD MEMBERS ELIGIBLE FOR INTERVIEW  
[NO LONGER LIVE IN THE HOUSEHOLD/ARE UNDER THE AGE OF  
15/ARE CURRENTLY SERVING IN THE ARMED FORCES]

THIS HOUSEHOLD IS NOW CLASSIFIED A  
TYPE C NONINTERVIEW.

IF THIS IS INCORRECT, DO THE FOLLOWING:

[RESTART THE CASE IN CASE MANAGEMENT/PRESS F1;BACKUP  
AND VERIFY AGE IN THE AGECHK SCREEN/ PRESS F1; CHANGE  
ARMED FORCES STATUS IN THE AFNOW SCREEN]

IF THIS INFORMATION IS CORRECT,  
PRESS ENTER TO CLOSE OUT THE CASE.

-

---

**Labor Force, Part 1 - Identifying Employers, Businesses Owned, etc.**

---

**-LFINTRO-**

These next questions are about [FIRST AND LAST NAME] work activities during the last four months, from [MONTH1] 1st until today, as shown on the calendar.

SHOW FLASHCARD E

\_\_\_\_\_

---

**-OLDJOB-**

Last time we recorded that [[FIRST AND LAST NAME] [ALSO] worked for [NAME OF EMPLOYER]. [DO/DOES] [HE/SHE] still work for [NAME OF EMPLOYER]?

- (1) Yes
  - (2) No
  - (N) Never had that job
- \_\_\_\_\_

---

**-LEAVJ-**

When did [FIRST AND LAST NAME] leave that job?

If the respondent left the job before [MONTH1] of the reference period, enter a (B).

Month: \_\_\_\_\_

Day: \_\_\_\_\_

---

**-W2ENDJMTH-**

What is your best estimate of the month when [FIRST AND LAST NAME] ended employment with [NAME OF EMPLOYER]?

If the respondent left the job before [MONTH1] of the reference period, enter a (B).

MONTH \_\_\_\_\_

-----  
-W2ENDJDY-

What is your best estimate of the day of the month when  
[FIRST AND LAST NAME] ended employment with  
[NAME OF EMPLOYER]?

DAY \_\_\_\_

-----  
-W2RSEND-

What is the main reason [HE/SHE] stopped working  
for [NAME OF EMPLOYER]?

- (1) On Layoff
- (2) Retirement or old age
- (3) Childcare problems
- (4) Other family/personal obligations
- (5) Own Illness
- (6) Own Injury
- (7) School/Training
- (8) Discharged/Fired
- (9) Employer Bankrupt
- (10) Employer sold business
- (11) Job was temporary and ended
- (12) Quit to take another job
- (13) Slack work or business conditions
- (14) Unsatisfactory work arrangements (hours, pay, etc.)
- (15) Quit for some other reason

\_\_\_\_

-----  
-W2WCYN1-

Between [MONTH1] 1st and today, did [HE/SHE]  
receive any money from workers' compensation as a result  
of any kind of job-related injury or illness from this  
job or any other job?

- (1) Yes
- (2) No

\_\_\_\_

-----  
-W2UECYN1-

Between [MONTH1] 1st and today, did [HE/SHE] receive any type of unemployment payments related to this job or any other job?

- (1) Yes
- (2) No

\_\_\_\_\_

-----  
-W2UECYNTP1-

What type was it?

ENTER (N) FOR NO MORE

- (1) Regular
- (2) Supplemental
- (3) Other, including union benefits

\_\_\_\_\_

-----  
-OLDBUS-

Last time we recorded that [FIRST AND LAST NAME] [ALSO] had the business [NAME OF BUSINESS]. [DO/DOES] [HE/SHE] still have that business?

- (1) Yes
- (2) No
- (N) Never had that business

\_\_\_\_\_

-----  
-LEAVB-

When did [FIRST AND LAST NAME] give up that business?

If the respondent left business before [MONTH1] of the reference period, enter a (B).

Month: \_\_\_\_\_

Day: \_\_\_\_\_

-----  
-W2ENDBMTH-

What is your best estimate of the last month when [FIRST AND LAST NAME] [WAS/WERE] self-employed in this business, professional practice, or farm?

If the respondent left business job before [MONTH1] of the reference period, enter a (B).

MONTH \_\_\_\_

-----  
-W2ENDBDY-

What is your best estimate of the last day when [FIRST AND LAST NAME] [WAS/WERE] self-employed in this business, professional practice, or farm?

DAY \_\_\_\_

-----  
-W2RENDB-

(BUSINESS = [NAME OF BUSINESS])

What is the main reason [HE/SHE] gave up or ended this business (professional practice or farm)?

- (1) Retirement or old age
- (2) Childcare Problems
- (3) Other Family/Personal Problems
- (4) Own Illness
- (5) Own Injury
- (6) School/Training
- (7) Went Bankrupt/Business Failed
- (8) Sold Business or Transferred Ownership
- (9) To start other business/take job
- (10) Season ended for a Seasonal Business
- (11) Quit for Some Other Reason

\_\_\_\_

-----  
-W2OENDB-

ENTER THE SPECIFIC "OTHER" REASON ENDED BUSINESS

\_\_\_\_\_

-----  
-W2WCYN2-

Between [MONTH1] 1st and today, did [HE/SHE] receive any money from workers' compensation as a result of any kind of job-related injury or illness?

- (1) Yes
- (2) No

—

-----  
-W2PDJBTHN-

In addition to [HIS/HER] work with ...(READ LIST ABOVE), did [FIRST AND LAST NAME] have at least one other paid job, either full or part time, at any time between [MONTH1] 1st and today?

- (1) Yes
- (2) No
- (3) Not sure or Don't know

—

-----  
-W2NOPDJB-

Did [FIRST AND LAST NAME] do any other work at all that earned some money?

- (1) Yes
- (2) No

—

-----  
-W2JBORSE-

Was that additional work for an employer or [WAS/WERE]  
[FIRST AND LAST NAME] self-employed at it or both?

- (1) Employer
  - (2) Self-Employed
  - (3) Both
  - (4) Not Sure or Don't know
- 

-----  
-W2UNPAID-

Did [FIRST AND LAST NAME] do any unpaid work in a  
family business or farm?

- (1) Yes
  - (2) No
- 

-----  
-W2EMPNUM-

How many employers did [FIRST AND LAST NAME]  
have between [MONTH1] 1st and today?

—

-----  
-PDJBTHN-

Did [FIRST AND LAST NAME] have at least one paid job, either full or  
part time, at anytime between [MONTH1] 1st and today?

[COUNT ACTIVE DUTY IN THE ARMED FORCES AS A PAID JOB]

- (1) Yes
  - (2) No
-

---

-NOPDJB-

Did [FIRST AND LAST NAME] do any work at all that earned some money?

- (1) Yes
- (2) No

—

---

-JBORSE-

Was that for an employer or [WAS/WERE] [FIRST AND LAST NAME] self-employed or did [HE/SHE] have some other arrangement?

(INTERVIEWER NOTE: Other arrangements include odd jobs, on-call work, day labor, one-time jobs, and informal arrangements like babysitting, lawn mowing, or leaf raking for neighbors.)

- (1) Employer
- (2) Self-Employed
- (3) Both
- (4) Some other arrangement
- (5) Not Sure or Don't know

—

---

-UNPAID-

Did [FIRST AND LAST NAME] do any unpaid work in a family business or farm?

- (1) Yes
- (2) No

—

-----  
-NOWRK-

What is the main reason [FIRST AND LAST NAME] did not work at a job or business between [MONTH1] 1st and today?

- (1) Temporarily unable to work because of an injury
  - (2) Temporarily unable to work because of an illness
  - (3) Unable to work because of chronic health condition or disability
  - (4) Retired
  - (5) Pregnancy/childbirth
  - (6) Taking care of children/other persons
  - (7) Going to school
  - (8) Unable to find work
  - (9) On layoff (temporary or indefinite)
  - (10) Not interested in working at a job
  - (11) Other
- \_\_\_\_\_

-----  
-ONOWRK-

ENTER THE SPECIFIC "OTHER" REASON DID NOT WORK

\_\_\_\_\_

-----  
-WCYN3-

Between [MONTH1] 1st and today, did [HE/SHE] receive any money from workers' compensation as a result of any kind of job-related injury or illness?

- (1) Yes
  - (2) No
- \_\_\_\_\_

-----  
-UECYN3-

Between [MONTH1] 1st and today, did [HE/SHE] receive any type of unemployment payments?

- (1) Yes
- (2) No

—

-----  
-UECYNTP3-

What type was it?  
ENTER (N) FOR NO MORE

- (1) State unemployment compensation
- (2) Supplemental unemployment benefits
- (3) Other (strike pay, union benefits, Trade Adjustment Act benefits, etc.)

—   —   —

-----  
-LAYOFF-

Did [FIRST AND LAST NAME] spend any time on layoff from a job since [MONTH1] 1st?

- (1) Yes
- (2) No

—

-----  
-LAYDT-

When [FIRST AND LAST NAME] [WAS/WERE] laid off, did [HIS/HER] employer give [HIM/HER] a date to return to work?

- (1) Yes
- (2) No

—

-----  
-LAY6M-

[WAS/WERE] [HE/SHE] given any indication  
that [HE/SHE] would be recalled to work within  
6 months of being laid off?

- (1) Yes
- (2) No

—

-----  
-LKWRK-

Did [FIRST AND LAST NAME] spend any time looking for work  
since [MONTH1] 1st?

- (1) Yes
- (2) No

—

-----  
-WKSLKG-

In which weeks [WAS/WERE] [FIRST AND LAST NAME]  
[LOOKING FOR WORK/ON LAYOFF FROM A JOB] ?

ENTER THE NUMBERS BESIDE THE WEEKS, EVEN IF ONLY ONE DAY  
OF THAT WEEK WAS SPENT LOOKING OR ON LAYOFF.

ENTER (A) IF ALL WEEKS.

ENTER (N) AFTER LAST REPORTED WEEK

[WEEK1]	[WEEK7]	[WEEK13]
[WEEK2]	[WEEK8]	[WEEK14]
[WEEK3]	[WEEK9]	[WEEK15]
[WEEK4]	[WEEK10]	[WEEK16]
[WEEK5]	[WEEK11]	[WEEK17]
[WEEK6]	[WEEK12]	[WEEK18]

— — — — —  
— — — — —  
— — — — —

-----  
-TAKJOB-

Could [FIRST AND LAST NAME] have started a job during any of those weeks if one had been offered or could [HE/SHE] have returned to work if [HE/SHE] had been recalled?

[OR]

Could [FIRST AND LAST NAME] have started a job during any of those weeks if one had been offered?

[OR]

Could [FIRST AND LAST NAME] have returned to work during any of those weeks if [HE/SHE] had been recalled?

- (1) Yes
- (2) No

—

-----  
-NOTAKE-

Why was that?

- (1) Waiting for a new job to begin
- (2) Own temporary illness
- (3) School
- (4) Other

—

-----  
-EMPNUM-

How many employers did [FIRST AND LAST NAME] have between [MONTH1] 1st and today?

—

-----  
-CONCHK1-

Did [FIRST AND LAST NAME] have a definite arrangement with one or more employers to work on an ongoing basis?

- (1) Yes
- (2) No
- (3) Not Sure or Don't Know

—

-----  
-EMPNUM2-

How many employers did [FIRST AND LAST NAME] have between [MONTH1] 1st and today?

—

-----  
-EMPNUM2A-

How many employers did [FIRST AND LAST NAME] have between [MONTH1] 1st and today?

Enter "N" for None.

—

-----  
-CONCHK2-

Did [FIRST AND LAST NAME] have a definite arrangement with any of [HIS/HER] [NUMBER OF EMPLOYERS] employers to work on an ongoing basis?

- (1) Yes
- (2) No
- (3) Not Sure or Don't Know

—

-----  
-WRKTYPE-

Did [FIRST AND LAST NAME] generally do the same type of work for [HIS/HER] [NUMBER OF JOBS] employers?

(READ IF NECESSARY: For example: construction work, private household work, sales, consulting.)

- (1) Yes
- (2) No

\_\_\_\_\_

-----  
-EMPNAM-

What is the name of [ONE OF THE EMPLOYERS/ANOTHER EMPLOYER] [FIRST AND LAST NAME] [HAD AT SOMETIME SINCE MONTH 1ST]?

\_\_\_\_\_

-----  
-STRTJB-

Did [FIRST AND LAST NAME] begin [HIS/HER] employment with [NAME OF EMPLOYER] at some time between [MONTH1] 1st and today?

- (1) Yes
- (2) No

\_\_\_\_\_

-----  
-STRTREFP-

Please tell me the month and day [FIRST AND LAST NAME] began.

MONTH: \_\_\_\_\_  
DAY: \_\_\_\_\_

-----  
-STRTBEFR-

Please tell me the year [FIRST AND LAST NAME] began.

YEAR: \_\_\_\_\_

-----  
-STRTMONJB-

And in what month was that?

MONTH: \_\_\_\_

-----  
-STRJTJR-

What is your BEST estimate of the year  
[FIRST AND LAST NAME] began?

YEAR \_\_\_\_

-----  
-STRTJMTH-

What is your BEST estimate of the month  
[FIRST AND LAST NAME] began?

MONTH \_\_\_\_

-----  
-STRTJDY-

What is your BEST estimate of the day of the month  
when [FIRST AND LAST NAME] began?

DAY \_\_\_\_

-----  
-BEFORE-

Was it before [MONTH1] 1st?

- (1) Yes
- (2) No

\_\_\_\_

-----  
-STLEMP-

[DO/DOES] [HE/SHE] still work for this employer?

(1) Yes

(2) No

\_\_\_\_

-----  
-ENDJB-

When did [HIS/HER] employment with  
[NAME OF EMPLOYER] end?

MONTH      \_\_\_\_

DAY         \_\_\_\_

-----  
-ENDJMTH-

What is your best estimate of the month  
when [FIRST AND LAST NAME] ended employment with  
[NAME OF EMPLOYER]?

MONTH      \_\_\_\_

-----  
-ENDJDY-

What is your best estimate of the day of the month when  
[FIRST AND LAST NAME] ended employment with  
[NAME OF EMPLOYER]?

DAY      \_\_\_\_

-----  
-RSEND-

What is the main reason [HE/SHE] stopped working for [NAME OF EMPLOYER]?

- (1) On Layoff
  - (2) Retirement or old age
  - (3) Childcare problems
  - (4) Other family/personal obligations
  - (5) Own Illness
  - (6) Own Injury
  - (7) School/Training
  - (8) Discharged/Fired
  - (9) Employer Bankrupt
  - (10) Employer sold business
  - (11) Job was temporary and ended
  - (12) Quit to take another job
  - (13) Slack work or business conditions
  - (14) Unsatisfactory work arrangements (hours, pay, etc.)
  - (15) Quit for some other reason
- 

-----  
-WCYN1-

Between [MONTH1] 1st and today, did [HE/SHE] receive any money from workers' compensation as a result of any kind of job-related injury or illness from this job or any other job?

- (1) Yes
  - (2) No
- 

-----  
-UECYN1-

Between [MONTH1] 1st and today, did [HE/SHE] receive any type of unemployment payments related to this job or any other job?

- (1) Yes
  - (2) No
-

-----  
-UECYNTP1-

What type was it?

ENTER (N) FOR NO MORE

- (1) Regular
- (2) Supplemental
- (3) Other, including union benefits

— — —

-----  
-W2ALLBUSNUM-

How many businesses did [FIRST AND LAST NAME] have,  
alone or jointly, between [MONTH1] 1st and today?

—

FR NOTE:  
CONSIDER A PROFESSIONAL PRACTICE OR A FARM  
TO BE A BUSINESS.

-----  
-ALLBUSNUM-

How many businesses did [FIRST AND LAST NAME]  
have, alone or jointly, between [MONTH1] 1st  
and today?

—

FR NOTE:  
CONSIDER A PROFESSIONAL PRACTICE OR A FARM  
TO BE A BUSINESS.

-----  
-ADVRTS-

Did [FIRST AND LAST NAME] use paid advertising  
for any of these businesses?

- (1) Yes
- (2) No

—

-----  
-POB-

Did [FIRST AND LAST NAME] maintain an office, store,  
or other place of business?

- (1) Yes
- (2) No

—

-----  
-CAPITAL-

Did [FIRST AND LAST NAME] use specialized equipment  
for any of these businesses?

- (1) Yes
- (2) No

—

-----  
-ALLBUS-

What is the name of [THE BUSINESS/PRACTICE/FARM]  
[OWNED BETWEEN MONTH1 1ST AND TODAY]?

\_\_\_\_\_

-----  
-REALBIZ-

Did [FIRST AND LAST NAME] take an active part in  
this business or did [HE/SHE] own it  
as an investment only?

- (1) Active participant
- (2) Both participant and investment
- (3) Investment only

—

-----  
-STRTBUS-

Did [FIRST AND LAST NAME] start [NAME OF BUSINESS]  
at some time between [MONTH1] 1st and today?

- (1) Yes
- (2) No

\_\_\_\_

-----  
-STRTBSRP-

Please tell me the month and day [FIRST AND LAST NAME]  
started this business.

MONTH: \_\_\_\_

DAY: \_\_\_\_

-----  
-STRTBSBF-

Please tell me the year [FIRST AND LAST NAME] started  
this business.

YEAR: \_\_\_\_

-----  
-STRTMONBS-

And in what month was that?

MONTH: \_\_\_\_

-----  
-STRTBYSR-

(BUSINESS = [NAME OF BUSINESS])

What is your BEST estimate of the year when  
[FIRST AND LAST NAME] started this business?

YEAR \_\_\_\_

-----  
-STRTBMTH-

(BUSINESS = [NAME OF BUSINESS])

What is your BEST estimate of the month  
when [FIRST AND LAST NAME] started this business?

MONTH     \_\_\_

-----  
-STRTBDY-

(BUSINESS = [NAME OF BUSINESS])

What is your BEST estimate of the day of the month  
when [FIRST AND LAST NAME] started this business?

DAY     \_\_\_

-----  
-BEFORE2-

Was it before [MONTH1] 1st?

- (1) Yes
- (2) No

\_\_\_

-----  
-BIZNOW-

[DO/DOES] [FIRST AND LAST NAME] still own this business?

- (1) Yes
- (2) No

\_\_\_

-----  
-ENDBS-

When was the last day that [FIRST AND LAST NAME]  
had this business?

MONTH     \_\_\_

DAY        \_\_\_

-----  
-ENDBMTH-

What is your best estimate of the last month  
when [FIRST AND LAST NAME] [WAS/WERE] self-employed in  
this business (professional practice/farm)?

MONTH     \_\_\_

-----  
-ENDBDY-

What is your best estimate of the last day when  
[FIRST AND LAST NAME] [WAS/WERE] self-employed in  
this business (professional practice/farm)?

DAY     \_\_\_

-----  
-RENDB-

(BUSINESS = [NAME OF BUSINESS])

What is the main reason [HE/SHE] gave up or ended  
this business (professional practice or farm)?

- (1) Retirement or old age
- (2) Childcare Problems
- (3) Other Family/Personal Problems
- (4) Own Illness
- (5) Own Injury
- (6) School/Training
- (7) Went Bankrupt/Business Failed
- (8) Sold Business or Transferred Ownership
- (9) To start other business/take job
- (10) Season ended for a Seasonal Business
- (11) Quit for Some Other Reason

\_\_\_

-----  
-OENDB-

ENTER THE SPECIFIC "OTHER" REASON ENDED BUSINESS

\_\_\_\_\_

-----  
-WCYN2-

Between [MONTH1] 1st and today, did [HE/SHE] receive any money from workers' compensation as a result of any kind of job-related injury or illness?

- (1) Yes
- (2) No

—

-----  
-LNGJOB-

For which of these [NUMBER OF EMPLOYERS] employers did [HE/SHE] work the most hours between [MONTH1] 1st and today?

—

-----  
-LNGJOB2-

For which of these [NUMBER OF JOBS] employers did [HE/SHE] work the next most hours between [MONTH1] 1st and today?

—

-----  
-INTRJ-

The next questions refer to [FIRST AND LAST NAME] employment with [NAME OF EMPLOYER].

PRESS ENTER TO CONTINUE

—

-----  
-JBDTY-

(EMPLOYER = [NAME OF EMPLOYER])

Did [HIS/HER] main activities or duties on the  
job with [NAME OF EMPLOYER] change between [MONTH1] 1st  
and the time [HE/SHE] left the job?

- (1) Yes
- (2) No

—

-----  
-JBDUTY-

(EMPLOYER = [NAME OF EMPLOYER])

Have [FIRST AND LAST NAME] main activities or duties on  
the job with [NAME OF EMPLOYER] changed since [MONTH1]?

- (1) Yes
- (2) No

—

-----  
-CLWRK-

ASK OR VERIFY

[IS/WAS] [NAME OF EMPLOYER]:

- (1) A Government organization (includes Armed Forces)
- (2) A Private, For Profit, Company
- (3) A Non-Profit Organization, including tax exempt  
and charitable organizations
- (4) A family business or farm

—

-----  
-FAMWRK-

[ARE/IS, WAS/WERE] [FIRST AND LAST NAME] paid for [HIS/HER] work in the family business or farm?

- (1) Yes
- (2) No

\_\_\_\_\_

-----  
-KINDG-

(EMPLOYER = [NAME OF EMPLOYER])

ASK OR VERIFY

[IS/WAS] that Federal Government, State Government, or Local Government or active-duty Armed Forces?

- (1) Federal (civilian only)
- (2) State
- (3) Local (County, City, Township)
- (4) Armed Forces (active duty only)

\_\_\_\_\_

-----  
-FNCGV-

(EMPLOYER = [NAME OF EMPLOYER])

What [IS/WAS] the main function or activity of the government organization that [FIRST AND LAST NAME] worked for?

\_\_\_\_\_

-----  
-KNDIN-

(EMPLOYER = [NAME OF EMPLOYER])

What [KIND OF BUSINESS/INDUSTRY/ORGANIZATION] [IS/WAS]:

\_\_\_\_\_

-----  
-TYPIN-

(EMPLOYER = [NAME OF EMPLOYER])

ASK OR VERIFY

[IS/WAS] it mainly --

- (1) Manufacturing
  - (2) Wholesale Trade
  - (3) Retail Trade
  - (4) Service
  - (5) Or Something Else?
- \_\_\_\_\_

-----  
-KNDWK-

(EMPLOYER = [NAME OF EMPLOYER])

What kind of work [ARE/IS] [HE/SHE][DOING FOR/DOING ON THIS JOB], that is, what [IS/WAS] [HIS/HER] occupation?

READ IF NECESSARY: For example: Bookkeeper, plumber, press operator

\_\_\_\_\_

-----  
-ACTVT-

(EMPLOYER = [NAME OF EMPLOYER])

What [ARE/WERE] [HIS/HER] usual activities or [DUTIES/DUTIES ON THIS JOB]?

READ IF NECESSARY: For example: Keeping account books, repairing pipes, operating printing press

\_\_\_\_\_

-----  
-JOBHRS-

(EMPLOYER = [NAME OF EMPLOYER])

During the weeks that [FIRST AND LAST NAME] worked between [DATE STARTED JOB] and [TIME LEFT JOB], how many hours per week did [HE/SHE] usually work at all [JOB-RELATED ACTIVITIES/ACTIVITIES FOR NAME OF EMPLOYER]?

\_\_\_\_\_

-----  
-PAYHR-

(EMPLOYER = [NAME OF EMPLOYER])

[ARE/IS, WAS/WERE] [HE/SHE] paid by the hour?

- (1) Yes
- (2) No

\_\_\_\_\_

-----  
-PYRAT-

(EMPLOYER = [NAME OF EMPLOYER])

What was [HIS/HER] regular hourly pay rate  
[AT THE END OF/AT THAT TIME]?

\_\_\_ Dollars and \_\_\_ Cents

-----  
-PYPER-

(EMPLOYER = [NAME OF EMPLOYER])

How often [ARE/IS, WAS/WERE] [HE/SHE] paid?

(READ CATEGORIES IF NECESSARY)

- (1) Once a week
- (2) Once every 2 weeks
- (3) Once a month
- (4) Twice a month
- (5) Unpaid in a family business or farm
- (6) On commission
- (7) Some other way

\_\_\_\_\_

-----  
-OTHPY-

(EMPLOYER = [NAME OF EMPLOYER])

SPECIFY THE "OTHER" PAY PERIOD

\_\_\_\_\_

-----  
-LSTPY-

(EMPLOYER = [NAME OF EMPLOYER])

On what date [WAS/WERE][FIRST AND LAST NAME] last paid?

(N) Not yet paid

MONTH        \_\_\_

DAY           \_\_\_

-----  
-UNION-

(EMPLOYER = [NAME OF EMPLOYER])

[ON THIS JOB] [ARE/IS, WAS/WERE] [FIRST AND LAST NAME]  
a member of a labor union or employee association  
like a union?

(1) Yes

(2) No

\_\_\_\_\_

-----  
-CNTRC-

(EMPLOYER = [NAME OF EMPLOYER])

[ARE/IS, WAS/WERE] [HE/SHE] covered by a union  
or employee association contract?

(1) Yes

(2) No

\_\_\_\_\_

-----  
-EMPLOC-

(ASK IF NECESSARY)

[DOES/DID] [NAME OF EMPLOYER] operate in  
more than one location?

- (1) Yes
- (2) No

—

-----  
-EMPSIZE-

About how many persons [ARE/WERE] employed by  
[EMPLOYER/LOCATION] [EMPLOYEE WORKS/WORKED]?

(READ CATEGORIES IF NECESSARY)

- (1) Under 25
- (2) 25 to 99
- (3) 100 to 499
- (4) 500 to 999
- (5) 1,000 or more

—

-----  
-BIGBUS-

NOTE TO FR: ANSWERS ARE LIMITED TO THE BUSINESSES DISPLAYED  
BELOW WHICH WERE OPERATED DURING THE REFERENCE PERIOD.

I recorded that [FIRST AND LAST NAME] had [NUMBER OF BUSINESSES] businesses between  
[MONTH1] 1st and the end of [MONTH4].

Which 2 of these businesses produced the highest earnings before expenses during this time period?

—    —

---

-INTRB-

The next questions refer to the business  
[NAME OF BUSINESS].

PRESS ENTER TO CONTINUE

—

---

-BSDTY-

(BUSINESS = [NAME OF BUSINESS])

Did [HIS/HER] main activities or duties of this  
business change between [MONTH1] 1st and the time  
[HE/SHE] left the business?

- (1) Yes
  - (2) No
- 

---

-BSDUTY-

(BUSINESS = [NAME OF BUSINESS])

Have [FIRST AND LAST NAME] main activities or duties for  
this business changed since [MONTH1] 1st?

- (1) Yes
  - (2) No
- 

---

-KNDBS-

(BUSINESS = [NAME OF BUSINESS])

What kind of business [IS/WAS] this?  
READ IF NECESSARY: What [DOES/DID] the  
business do or make?

\_\_\_\_\_

---

-TYPBS-

(BUSINESS = [NAME OF BUSINESS])

ASK OR VERIFY

[IS/WAS] [THIS/THIS BUSINESS] mainly --

- (1) Manufacturing
  - (2) Wholesale Trade
  - (3) Retail Trade
  - (4) Service
  - (5) Or Something Else?
- 

---

-OCCBS-

(BUSINESS = [NAME OF BUSINESS])

What kind of work [DO/DOES] [FIRST AND LAST NAME] do,  
that is, what [IS/WAS] [HIS/HER] occupation?

READ IF NECESSARY: For example: sales manager, dentist, farmer

\_\_\_\_\_

---

-DUTYB-

(BUSINESS = [NAME OF BUSINESS])

What [ARE/WERE] [HIS/HER] usual activities  
or duties in [THESE BUSINESSES/THIS BUSINESS]?

READ IF NECESSARY: For example: managing sales staff,  
repairing teeth, farming

\_\_\_\_\_

-----  
-HRSBS-

(BUSINESS = [NAME OF BUSINESS])

During the weeks [FIRST AND LAST NAME] worked between [DATE STARTED JOB] and [TIME LEFT JOB], how many hours per week did [FIRST AND LAST NAME] usually work AT ALL ACTIVITIES for [NAME OF BUSINESS]?

—

-----  
-GRSSB-

(BUSINESS = [NAME OF BUSINESS])

Do you think the earnings before expenses from [THIS BUSINESS/THESE BUSINESSES] were \$2500 or more over the [TIME/LAST 12 MONTHS] that [HE/SHE] [OWNED] [THE BUSINESS/THESE BUSINESSES]?

- (1) Yes
- (2) No

—

-----  
-GROSB-

(BUSINESS = [NAME OF BUSINESS])

Do you think that the earnings before expenses from [THIS BUSINESS/THESE BUSINESSES] will be \$2500 or more during the next 12 months?

- (1) Yes
- (2) No

—

-----  
-LSTBS-

BUSINESSES OWNED BY OTHER HOUSEHOLD MEMBERS

\*\* DO NOT READ TO RESPONDENT \*\*

Have questions about the number of employees, and whether or not the business is incorporated, already been answered by somebody for this business: [NAME OF BUSINESS]?

- (1) Yes
- (2) No

—

-----  
-EMPB-

(BUSINESS = [NAME OF BUSINESS])

Between [DATE STARTED JOB] and [TIME LEFT JOB], what was the maximum number of employees, including [FIRST AND LAST NAME], working for this business at any one time?

READ IF NECESSARY:

- (1) Under 25
- (2) 25 to 99
- (3) 100 to 499
- (4) 500 to 999
- (5) 1,000 or more

—

-----  
-INCPB-

(BUSINESS = [NAME OF BUSINESS])

[IS/WAS] this business incorporated?

- (1) Yes
- (2) No

—

-----  
-PROPB-

(BUSINESS = [NAME OF BUSINESS])

[DO/DOES] [FIRST AND LAST NAME] own this business [HIMSELF/HERSELF]  
or [IS/WAS] it a partnership?

- (1) Alone
- (2) Partnership

—

-----  
-HPRTB-

(BUSINESS = [NAME OF BUSINESS])

[IS/WAS] any other member of this household  
an owner or partner in this business?

- (1) Yes
- (2) No

—

-----  
-PARTB-

(BUSINESS = [NAME OF BUSINESS])

Who [IS/WAS] that?

- (N) No More

—    —    —

-----  
-SLRYB-

(BUSINESS = [NAME OF BUSINESS])

[DO/DOES/DID] [FIRST AND LAST NAME] draw a  
regular salary from this business?

- (1) Yes
- (2) No

—

-----  
-OINCB-

(BUSINESS = [NAME OF BUSINESS])

Did [FIRST AND LAST NAME] receive any [OTHER]  
income from this business between [MONTH1] 1st  
and the end of [MONTH4]?

(1) Yes

(2) No

—

-----  
-CONWКСWRK-

Please look at the calendar. In which weeks did  
[FIRST AND LAST NAME] work at a job or business or do  
any work at all for pay or profit?

ENTER THE NUMBERS OF THE WEEKS

ENTER (A) IF ALL WEEKS

ENTER (N) FOR NONE/NO MORE WEEKS TO ENTER

[WEEK1]	[WEEK7]	[WEEK13]
[WEEK2]	[WEEK8]	[WEEK14]
[WEEK3]	[WEEK9]	[WEEK15]
[WEEK4]	[WEEK10]	[WEEK16]
[WEEK5]	[WEEK11]	[WEEK17]
[WEEK6]	[WEEK12]	[WEEK18]

—	—	—	—	—	—
—	—	—	—	—	—
—	—	—	—	—	—

-----  
-FPAWOP-

HAND RESPONDENT THE CALENDAR

Now, consider ALL [HIS/HER] work  
[FROM ALL JOBS AND BUSINESSES]  
during this period.

Between [MONTH1] 1st and the end of [MONTH4],  
were there any full weeks, Sunday through Saturday,  
when [FIRST AND LAST NAME] did not work at all?

- (1) Yes
- (2) No

—

-----  
-FPAWAY-

Did [FIRST AND LAST NAME] get paid for ALL those weeks [HE/SHE]  
did not work?

- (1) Yes
- (2) No

—

-----  
-FPABWK-

Please look at the calendar. Which weeks [WAS/WERE]  
[FIRST AND LAST NAME] absent the whole week without pay?  
ENTER THE NUMBERS OF THE WEEKS ABSENT  
ENTER (A) IF ALL WEEKS  
ENTER (N) AFTER LAST WEEK IS ENTERED

[WEEK1]	[WEEK7]	[WEEK13]
[WEEK2]	[WEEK8]	[WEEK14]
[WEEK3]	[WEEK9]	[WEEK15]
[WEEK4]	[WEEK10]	[WEEK16]
[WEEK5]	[WEEK11]	[WEEK17]
[WEEK6]	[WEEK12]	[WEEK18]

—	—	—	—	—	—
—	—	—	—	—	—
—	—	—	—	—	—

-----  
-FPABRE-

What was the main reason [FIRST AND LAST NAME] [WAS/WERE] absent without pay during those weeks?

- (1) On layoff (temporary or indefinite)
  - (2) Slack work or business conditions
  - (3) Own injury
  - (4) Own illness/medical problems
  - (5) Pregnancy/childbirth
  - (6) Taking care of children
  - (7) On vacation/personal days
  - (8) Bad weather
  - (9) Labor dispute
  - (10) New job to begin within 30 days
  - (11) Participated in a job-sharing arrangement
  - (12) Other
- \_\_\_\_\_

-----  
-FPOTHR-

ENTER THE SPECIFIC "OTHER" REASON ABSENT WITHOUT PAY

\_\_\_\_\_

-----  
-WCYN4-

Did [HE/SHE] receive any money from workers' compensation as a result of any kind of job-related injury or illness?

- (1) Yes
  - (2) No
- \_\_\_\_\_

-----  
-UECYN4-

Did [HE/SHE] receive any type of unemployment payments?

- (1) Yes
  - (2) No
- \_\_\_\_\_

-----  
-UECYNTP4-

What type was it?

ENTER (N) FOR NO MORE

- (1) State unemployment compensation
- (2) Supplemental unemployment benefits
- (3) Other (strike pay, union benefits, Trade Adjustment Act benefits, etc)

— — —

-----  
-PPAWOP-

HAND RESPONDENT THE CALENDAR

Between [MONTH1] 1st and the end of [MONTH4], there were some weeks when [HE/SHE] did not have a job or business, and some weeks when [HE/SHE] did. During the weeks when [HE/SHE] DID have one, were there any FULL weeks, Sunday through Saturday, when [HE/SHE] did not work at all?

IF THE RESPONDENT NEEDS TO KNOW WHAT CALENDAR WEEKS TO CHOOSE FROM, READ THE RESPONDENT THE FOLLOWING WEEKS:

[WEEK1]	[WEEK2]	[WEEK3]
[WEEK4]	[WEEK5]	[WEEK6]
[WEEK7]	[WEEK8]	[WEEK9]
[WEEK10]	[WEEK11]	[WEEK12]
[WEEK13]	[WEEK14]	[WEEK15]
[WEEK16]	[WEEK17]	[WEEK18]

- (1) Yes
- (2) No

—

-----  
-PPAWAY-

Did [FIRST AND LAST NAME] get paid for ALL those weeks [HE/SHE] did not work?

- (1) Yes
- (2) No

—

-----  
-PPABWK-

Please look at the calendar. Which of these weeks [WAS/WERE]  
[HE/SHE] absent the whole week without pay?

ENTER THE NUMBERS OF THE WEEKS ABSENT

ENTER (A) IF ALL WEEKS

ENTER (N) AFTER LAST WEEK IS ENTERED

[WEEK1]	[WEEK2]	[WEEK3]
[WEEK4]	[WEEK5]	[WEEK6]
[WEEK7]	[WEEK8]	[WEEK9]
[WEEK10]	[WEEK11]	[WEEK12]
[WEEK13]	[WEEK14]	[WEEK15]
[WEEK16]	[WEEK17]	[WEEK18]

___	___	___	___	___	___
___	___	___	___	___	___
___	___	___	___	___	___

-----  
-PPABRE-

What was the main reason [FIRST AND LAST NAME] [WAS/WERE]  
absent without pay during those weeks?

- (1) On layoff (temporary or indefinite)
- (2) Slack work or business conditions
- (3) Own injury
- (4) Own illness/medical problems
- (5) Pregnancy/childbirth
- (6) Taking care of children
- (7) On vacation/personal days
- (8) Bad weather
- (9) Labor dispute
- (10) New job to begin within 30 days
- (11) Participated in a job-sharing arrangement
- (12) Other

\_\_\_

-----  
-WCYN5-

Did [HE/SHE] receive any money from workers' compensation as a result of any kind of job-related injury or illness?

- (1) Yes
- (2) No

\_\_\_\_\_

-----  
-UECYN5-

Did [HE/SHE] receive any type of unemployment payments?

- (1) Yes
- (2) No

\_\_\_\_\_

-----  
-UECYNTP5-

What type was it?  
ENTER (N) FOR NO MORE

- (1) State unemployment compensation
- (2) Supplemental unemployment benefits
- (3) Other (strike pay, union benefits, Trade Adjustment Act benefits, etc.)

\_\_\_\_\_

-----  
-PPLOOK-

Now let's talk about the weeks between [MONTH1] 1st and the end of [MONTH4] when [FIRST AND LAST NAME] did NOT have a job or a business.

During THOSE weeks, did [HE/SHE] spend any time on layoff from a job?

IF THE RESPONDENT NEEDS TO KNOW WHAT CALENDAR WEEKS TO CHOOSE FROM, READ THE RESPONDENT THE FOLLOWING WEEKS:

[WEEK1]	[WEEK2]	[WEEK3]
[WEEK4]	[WEEK5]	[WEEK6]
[WEEK7]	[WEEK8]	[WEEK9]
[WEEK10]	[WEEK11]	[WEEK12]
[WEEK13]	[WEEK14]	[WEEK15]
[WEEK16]	[WEEK17]	[WEEK18]

- (1) Yes
  - (2) No
- 

-----  
-PPLAYDT-

When [FIRST AND LAST NAME] [WAS/WERE] laid off, did [HIS/HER] employer give [HIM/HER] a date to return to work?

- (1) Yes
  - (2) No
- 

-----  
-PPLAY6M-

[WAS/WERE] [HE/SHE] given any indication that [HE/SHE] would be recalled to work within 6 months of being laid off?

- (1) Yes
  - (2) No
-

-----  
-PPLKWRK-

During the weeks when [HE/SHE] did not have a job or business, did [FIRST AND LAST NAME] spend any time looking for work?

[OR]

During those weeks did [FIRST AND LAST NAME] spend any time looking for work?

(1) Yes

(2) No

—

-----  
-PPLKWK-

In which of those weeks [WAS/WERE][FIRST AND LAST NAME] [LOOKING FOR WORK/ON LAYOFF FROM A JOB ]?

ENTER THE NUMBERS BESIDE THE WEEKS, EVEN IF ONLY ONE DAY OF THAT WEEK WAS SPENT LOOKING OR ON LAYOFF.

ENTER (A) IF ALL WEEKS

ENTER (N) AFTER LAST REPORTED WEEK

[WEEK1]	[WEEK2]	[WEEK3]
[WEEK4]	[WEEK5]	[WEEK6]
[WEEK7]	[WEEK8]	[WEEK9]
[WEEK10]	[WEEK11]	[WEEK12]
[WEEK13]	[WEEK14]	[WEEK15]
[WEEK16]	[WEEK17]	[WEEK18]

—	—	—	—	—	—
—	—	—	—	—	—
—	—	—	—	—	—

-----  
-PPTAKJOB-

Could [FIRST AND LAST NAME] have started a job during those weeks if one had been offered or could [HE/SHE] have returned to work if [HE/SHE] had been recalled?

[OR]

Could [FIRST AND LAST NAME] have started a job during any of those weeks if one had been offered?

[OR]

Could [FIRST AND LAST NAME] have returned to work during any of those weeks if [HE/SHE] had been recalled?

- (1) Yes
- (2) No

—

-----  
-PPNOTAKE-

Why was that?

- (1) Waiting for a new job to begin
- (2) Own temporary illness
- (3) School
- (4) Other

—

-----  
-NOTHER-

ENTER THE SPECIFIC "OTHER" REASON COULD NOT TAKE JOB

\_\_\_\_\_

-----  
-SOMWRK-

During the weeks that [FIRST AND LAST NAME] did not have a job or a business, did [HE/SHE] do any work at all that earned some money?

- (1) Yes
- (2) No

—

-----  
-MTHWRK-

In which of the months [MONTH1] through  
[MONTH4] did [HE/SHE] do that work?

ENTER (1) BY MONTH IF WORKED  
ENTER (0) BY MONTH IF NOT WORKED

[MONTH1]: \_\_\_\_  
[MONTH2]: \_\_\_\_  
[MONTH3]: \_\_\_\_  
[MONTH4]: \_\_\_\_

-----  
-WCYN6-

Did [HE/SHE] receive any money from workers' compensation  
as a result of any kind of job-related injury or illness?

- (1) Yes
- (2) No

\_\_\_\_\_

-----  
-UECYN6-

Did [HE/SHE] receive any type of unemployment  
payments?

- (1) Yes
- (2) No

\_\_\_\_\_

-----  
-UECYNTP6-

What type was it?  
ENTER (N) FOR NO MORE

- (1) State unemployment compensation
- (2) Supplemental unemployment benefits
- (3) Other (strike pay, union benefits, Trade  
Adjustment Act benefits, etc.)

\_\_\_\_\_

-----  
-PTWRK-

Now consider all [HIS/HER] work from [HIS/HER] businesses during this period.

[WEEKS WORKED],  
were there any weeks when [HE/SHE] worked less than 35 hours?

NOTE: INCLUDE HOURS WORKED AT ALL JOBS/BUSINESSES

- (1) Yes
- (2) No

—

-----  
-PTRESN-

I have recorded that there were weeks in which [FIRST AND LAST NAME] worked less than 35 hours. What was the main reason [HE/SHE] worked less than 35 hours in those weeks?

- (1) Could not find full-time job
- (2) Wanted to work part-time
- (3) Temporarily unable to work full-time because of injury
- (4) Temporarily unable to work full-time because of illness
- (5) Unable to work full-time because of chronic health condition/disability
- (6) Taking care of children/other persons
- (7) Full-time workweek is less than 35 hours
- (8) Slack work or material shortage
- (9) Participated in a job-sharing arrangement
- (10) On vacation
- (11) In school
- (12) Other

—

-----  
-PTRESNB-

What was the main reason [FIRST AND LAST NAME] worked less than 35 hours in those weeks?

- (1) Could not find full-time job
  - (2) Wanted to work part-time
  - (3) Temporarily unable to work full-time because of injury
  - (4) Temporarily unable to work full-time because of illness
  - (5) Unable to work full-time because of chronic health condition/disability
  - (6) Taking care of children/other persons
  - (7) Full time workweek is less than 35 hours
  - (8) Slack work or material shortage
  - (9) Participated in a job-sharing arrangement
  - (10) On vacation
  - (11) In school
  - (12) Other
- \_\_\_\_\_

-----  
-PTSPEC-

ENTER THE SPECIFIC "OTHER" REASON FOR PART TIME WORK

\_\_\_\_\_

-----  
-SITNOWCT-

ASK OR VERIFY

[DO/DOES] [HE/SHE] work at a job, a business, or something else to earn money NOW?

- (1) Yes
  - (2) No
  - (3) Not sure or Don't know
- \_\_\_\_\_

---

-SITNOW-

What best describes [HIS/HER] situation now?

READ ALL ANSWERS

- (1) Looking for work
  - (2) On layoff from a job
  - (3) Waiting for a new job to begin
  - (4) Retired
  - (5) Taking care of home and family (including pregnancy)
  - (6) In school
  - (7) Not able to work because of illness or disability
  - (8) Or something else?
- \_\_\_\_\_

---

-OTHSIT-

ENTER THE SPECIFIC "OTHER" SITUATION

\_\_\_\_\_

---

-LAYEMP-

What is the name of the employer from which  
[FIRST AND LAST NAME] [ARE/IS] on layoff?

\_\_\_\_\_

---

-DISABL-

[DO/DOES] [FIRST AND LAST NAME] have a physical,  
mental or other health condition that limits the  
kind or amount of work [HE/SHE] can do?

- (1) Yes
  - (2) No
  - (H) Help
- \_\_\_\_\_

-----  
-DISPREV-

Does [FIRST AND LAST NAME] health or condition prevent  
[HIM/HER] from working at a job or business?

- (1) Yes
- (2) No

—

-----  
-EVERET-

[HAVE/HAS] [HE/SHE] ever retired, for any reason,  
from a job or business [INCLUDING MILITARY RETIREMENT]?

- (1) Yes
- (2) No

—

**General Income, Part 1 - Identifying Sources of Income from Government Income Programs,  
Retirement Income Plans, and Other Income**

---

-OTHINT-

We have completed the questions on work status. Next are questions on the receipt of income from government programs, retirement plans, or other sources.

PRESS ENTER TO CONTINUE

—

---

-LMPNOW-

Did [FIRST AND LAST NAME] receive any severance pay or lump sum payments from a pension or retirement plan when [HE/SHE] left [HIS/HER] job(s)?

- (1) Yes
  - (2) No
- 
- 

-LMPFUTR-

[DO/DOES] [FIRST AND LAST NAME] ever expect to receive any such payments from that/these job(s)?

- (1) Yes
  - (2) No
-

-----  
-LUMPTYP-

What type of payment?

ENTER (N) FOR NONE/NO MORE

- (1) Lump sum from pension/retirement plan
- (2) Severance pay
- (3) Deferred payment(s) payable at some later date
- (4) Something else

\_\_\_1 \_\_\_2 \_\_\_3 \_\_\_4

-----  
-LMPELSE-

What kind of other payment was it?

\_\_\_

-----  
-VAYN-

Excluding regular military retirement pay,  
insurance proceeds, and GI Bill benefits,  
did [FIRST AND LAST NAME] receive any payments from  
the Department of Veterans Affairs (VA)?

- (1) Yes
- (2) No

\_\_\_

-----  
-PWVAYN-

Last time we recorded that [FIRST AND LAST NAME] received payments from the Department of Veterans Affairs (VA) other than regular military retirement pay, insurance proceeds and GI Bill benefits.

Did [FIRST AND LAST NAME] receive any of those payments at anytime between [ MONTH1 ] 1st and today?

- (1) Yes
- (2) No

—

-----  
-PWVAMTH-

In which month did [FIRST AND LAST NAME] last receive those payments from the Veterans Administration?

- (1) [PREVIOUS WAVE MONTH1]
- (2) [PREVIOUS WAVE MONTH2]
- (3) [PREVIOUS WAVE MONTH3]
- (4) [PREVIOUS WAVE MONTH4]
- (5) [MONTH1]
- (6) [MONTH2]
- (7) [MONTH3]
- (8) [MONTH4]
- (9) Other
- (N) Never Received

—

-----  
-SSYN-

Did [FIRST AND LAST NAME] receive any  
Social Security payments?

- (1) Yes
- (2) No

—

-----  
-SSCLDYN-

Did [FIRST AND LAST NAME] receive any  
Social Security payments on behalf of:  
READ NAMES OF CHILDREN

- (1) Yes (2) No

Did [FIRST AND LAST NAME] receive any Social  
Security payments for [SELF]

- (1) Yes (2) No

-----  
-PWSSYN-

Last time I recorded that [FIRST AND LAST NAME]  
received Social Security payments.

Did [FIRST AND LAST NAME] receive any  
Social Security payments at any time  
between [MONTH] 1st and today?

- (1) Yes
- (2) No

—

-----  
-PWSSCLDYN-

Last time I recorded that [FIRST AND LAST NAME] received  
Social Security [CHILD NAME]

At any time since [MONTH 1st], did [FIRST AND LAST NAME]  
receive any Social Security payments especially for:

READ NAMES OF CHILDREN

(1) Yes (2) No

Did [FIRST AND LAST NAME] receive any Social Security payments  
for [SELF]?

(1) Yes (2) No

-----  
-PWSSMTH-

In which month did [FIRST AND LAST NAME] last  
receive payments from Social Security?

(1) [PREVIOUS WAVE MONTH1]

(2) [PREVIOUS WAVE MONTH2]

(3) [PREVIOUS WAVE MONTH3]

(4) [PREVIOUS WAVE MONTH4]

(5) [MONTH5]

(6) [MONTH2]

(7) [MONTH3]

(8) [MONTH4]

(9) Other

(N) Never Received

—

-----  
-SSIYN-

Did [FIRST AND LAST NAME] receive any income  
from SSI, that is, a program called  
Supplemental Security Income?

(1) Yes

(2) No

—

-----  
-SSICLDYN-

Did [FIRST AND LAST NAME] receive any  
Supplemental Security Income (SSI) for:  
READ NAMES OF CHILDREN

(1) Yes (2) No

Did [FIRST AND LAST NAME] receive any income from Supplemental  
Security Income (SSI) for SELF?

(1) Yes (2) No

-----  
-PWSSIYN-

Last time I recorded that [FIRST AND LAST NAME]  
received Supplemental Security Income  
(SSI) payments.

Did [FIRST AND LAST NAME] receive any SSI  
payments at any time between [MONTH1]  
1st and today?

(1) Yes

(2) No

—

-----  
-PWSSICLDYN- Last time I recorded that [FIRST AND LAST NAME]  
received Supplemental Security Income, or SSI.

At any time since [PREVIOUS WAVE MONTH5 1st], did [FIRST AND LAST NAME]  
receive any Supplemental Security Income (SSI) for:  
READ NAMES OF CHILDREN

(1) Yes (2) No

Did [FIRST AND LAST NAME] receive any income from Supplemental  
Security Income (SSI) for [SELF]?

(1) Yes (2) No

-----  
-PWSSIMTH-

In which month did [FIRST AND LAST NAME] last receive Supplemental Security Income payments?

- (1) [PREVIOUS WAVE MONTH1]
  - (2) [PREVIOUS WAVE MONTH2]
  - (3) [PREVIOUS WAVE MONTH3]
  - (4) [PREVIOUS WAVE MONTH4]
  - (5) [MONTH1]
  - (6) [MONTH2]
  - (7) [MONTH3]
  - (8) [MONTH4]
  - (9) Other
  - (N) Never Received
- 

-----  
-STSSIYN-

Did [FIRST AND LAST NAME] also receive a SEPARATE SSI payment from the State or local welfare office?

- (1) Yes
  - (2) No
- 

-----  
-DSYN-

Earlier I recorded that [FIRST AND LAST NAME] [HAVE/HAS] a health condition which limits the kind or amount of work [FIRST AND LAST NAME] can do. Did [FIRST AND LAST NAME] receive any income because of [FIRST AND LAST NAME] health condition?

- (1) Yes
  - (2) No
-

-----  
-DSTYP-

What kind of income was that?

Anything else?

ENTER (N) FOR NO MORE

- (1) Workers' Compensation
- (2) Payments from a sickness, accident, or disability insurance policy purchased on your own
- (3) Employer disability payments
- (4) Pension from company or union including income from profit-sharing plans
- (5) Federal Civil Service or other Federal civilian employee pension
- (6) State government pension
- (7) Local government pension
- (8) U.S. Military retirement pay exclude payments from the Department of Veterans Affairs (VA)
- (9) U.S. Government Railroad Retirement
- (10) Black Lung payments
- (11) Other

\_\_\_1 \_\_\_2 \_\_\_3 \_\_\_4 \_\_\_5 \_\_\_6 \_\_\_7 \_\_\_8 \_\_\_9 \_\_\_10 \_\_\_11

-----  
-OTHRTYPE-

What was the specific "other" source of the income [FIRST AND LAST NAME] received because of [fill HIS/HER] health condition?

\_\_\_

-----  
-PWDSYN-

Last time we recorded that [FIRST AND LAST NAME]  
received income because of a health condition  
or disability from the following source(s).

[LIST OF HEALTH DISABILITIES]

Did [FIRST AND LAST NAME] receive income from any of  
these sources during the time period from  
MONTH1 up to today?

- (1) Yes
- (2) No

—

Which ones?

- (A) All sources listed
- (N) None/No more

\_\_\_1 \_\_\_2 \_\_\_3 \_\_\_4 \_\_\_5 \_\_\_6 \_\_\_7 \_\_\_8 \_\_\_9 \_\_\_10 \_\_\_11

-----  
-DISREC1-

In which month did [FIRST AND LAST NAME] last receive  
[LIST OF DISABILITY TYPE]

- (1) [PREVIOUS WAVE MONTH1]
- (2) [PREVIOUS WAVE MONTH2]
- (3) [PREVIOUS WAVE MONTH3]
- (4) [PREVIOUS WAVE MONTH4]
- (5) [MONTH1]
- (6) [MONTH2]
- (7) [MONTH3]
- (8) [MONTH4]
- (9) Other
- (N) Never Received

—

-----  
-DISYR1-

When did [FIRST AND LAST NAME] last receive  
[LIST OF DISABILITY TYPE]

MONTH: \_\_

YEAR: \_\_\_\_\_

-----  
-OTHDIS-

Did [FIRST AND LAST NAME] receive income from any  
other source during this time period because  
of a health condition?

(1) Yes

(2) No

\_\_\_\_\_

-----  
-ODISTYP-

What kind of income was that?  
Anything else?

(N) None/No more

- (1) Worker's Compensation
- (2) Payments from a sickness, accident, or disability insurance policy purchased on your own
- (3) Employer disability payments
- (4) Pension from company or union including income from profit-sharing plans
- (5) Federal Civil Service or other Federal civilian employee pension
- (6) State government pension
- (7) Local government pension
- (8) U.S. Military retirement pay excluding payments from the Department of Veterans Affairs (VA)
- (9) U.S. Government Railroad Retirement
- (10) Black Lung Payments
- (11) Other

\_\_\_1 \_\_\_2 \_\_\_3 \_\_\_4 \_\_\_5 \_\_\_6 \_\_\_7 \_\_\_8 \_\_\_9 \_\_\_10 \_\_\_11

-----  
-OTHRDIS-

What was the specific "other" source of the income [FIRST AND LAST NAME] received because of [HIS/HER] health condition?

\_\_\_

-----  
-RTYN-

Earlier I recorded that [FIRST AND LAST NAME] retired from a previous job.[DID/DOES] receive any [OTHER] retirement income?

- (1) Yes
- (2) No

\_\_\_

-----  
-RTTYP-

What kind of income was that?

Anything else?

ENTER (N) FOR NONE/NO MORE

- (1) Pension from company or union  
including income from profit-sharing plans
- (2) Federal Civil Service or other Federal civilian employee pension
- (3) State government pension
- (4) Local government pension
- (5) U.S. Military retirement pay exclude payments from the  
Department of Veterans Affairs (VA)
- (6) U.S. Government Railroad Retirement
- (7) National Guard or Reserve Forces retirement
- (8) Other

\_\_\_1 \_\_\_2 \_\_\_3 \_\_\_4 \_\_\_5 \_\_\_6 \_\_\_7 \_\_\_8

-----  
-RETOTHR-

What is the specific "other" source of the  
retirement income that [FIRST AND LAST NAME] received.

\_\_\_

-----  
-LIFEYN-

Did [FIRST AND LAST NAME] receive any REGULAR retirement  
income from a paid-up life insurance policy  
or any other annuities?

(1) Yes

(2) No

\_\_\_

-----  
-PWRTYN-

Last time we recorded that [FIRST AND LAST NAME] received retirement income from the following source(s).  
[TYPES OF RETIREMENT INCOME]

Did [FIRST AND LAST NAME] receive income from any of these sources during the time period from [MONTH1] up to today?

- (1) Yes
- (2) No

\_\_\_\_\_

Which ones?

- (A) All sources listed
- (N) None/No more

\_\_\_1 \_\_\_2 \_\_\_3 \_\_\_4 \_\_\_5 \_\_\_6 \_\_\_7 \_\_\_8

-----  
-RETREC1-

In which month did [FIRST AND LAST NAME] last receive [RETIREMENT TYPE]?

- (1) [PREVIOUS WAVE MONTH1]
- (2) [PREVIOUS WAVE MONTH2]
- (3) [PREVIOUS WAVE MONTH3]
- (4) [PREVIOUS WAVE MONTH4]
- (5) [MONTH1]
- (6) [MONTH2]
- (7) [MONTH3]
- (8) [MONTH4]
- (9) Other
- (N) Never Received

\_\_\_\_\_

-----  
-RETYR1-

When did [FIRST AND LAST NAME] last receive  
[RETIREMENT TYPE]?

MONTH: \_\_

YEAR: \_\_\_\_\_

-----  
-OTHRET-

Did [FIRST AND LAST NAME] receive retirement income  
from any other source during this time period?

(1) Yes

(2) No

\_\_\_\_\_

-----  
-ORETTYP-

What kind of income was that?  
Anything else?

(N) None/No more

- (1) Pension from company or union including income  
from profit-sharing plans
- (2) Federal Civil Service or other Federal civilian  
employee pension
- (3) State government pension
- (4) Local government pension
- (5) U.S. Military retirement pay - exclude payments from  
the Department of Veterans Affairs (VA)
- (6) U.S. Government Railroad Retirement
- (7) National Guard or Reserve Forces retirement
- (8) Other

\_\_ 1 \_\_ 2 \_\_ 3 \_\_ 4 \_\_ 5 \_\_ 6 \_\_ 7 \_\_ 8

-----  
-OTHRRET-

What was the specific "other" source of the retirement income [FIRST AND LAST NAME] received?

\_\_\_\_\_

-----  
-SRYN-

Did [FIRST AND LAST NAME] receive any income as a result of being a [WIDOW/WIDOWER]?

(1) Yes

(2) No

\_\_\_\_\_

-----  
-SRTYP- What kind of income was that?

Anything else?

ENTER (N) FOR NONE/NO MORE

- (1) Pension from company or union including income from profit-sharing plans
- (2) Veterans' compensation or pension
- (3) Federal Civil Service or other Federal civilian employee pension
- (4) U.S. Government Railroad Retirement
- (5) State government pension
- (6) Local government pension
- (7) Income from paid-up life insurance policies or annuities
- (8) U.S. Military retirement pay. Exclude payments from the Department of Veterans Affairs (VA)
- (9) Black Lung benefits
- (10) Worker's Compensation
- (11) Payments from estate or trust
- (12) National Guard or Reserve Forces retirement
- (13) Other

\_\_\_1 \_\_\_2 \_\_\_3 \_\_\_4 \_\_\_5 \_\_\_6 \_\_\_7 \_\_\_8 \_\_\_9 \_\_\_10 \_\_\_11 \_\_\_12 \_\_\_13

-----  
-SUROTH-

What was the specific "other" source of  
income [FIRST AND LAST NAME] received as a  
[WIDOW/WIDOWER]?

\_\_\_\_\_

-----  
-PWSRYN- Last time we recorded that [FIRST AND LAST NAME] received income  
as a result of being a [WIDOW/WIDOWER] from the following source(s).  
[TYPE OF INCOME LIST]

Did [FIRST AND LAST NAME] receive income from any of these  
sources during the time period from [MONTH1] up to today?

(1) Yes (2) No

Which ones? (A) All sources listed (N) None/No more

\_\_\_1 \_\_\_2 \_\_\_3 \_\_\_4 \_\_\_5 \_\_\_6 \_\_\_7 \_\_\_8 \_\_\_9 \_\_\_10 \_\_\_11 \_\_\_12 \_\_\_13

-----  
-SURREC1-

In which month did [FIRST AND LAST NAME] last receive  
[INCOME TYPE]?

- (1) [PREVIOUS WAVE MONTH1]
  - (2) [PREVIOUS WAVE MONTH2]
  - (3) [PREVIOUS WAVE MONTH3]
  - (4) [PREVIOUS WAVE MONTH4]
  - (5) [MONTH1]
  - (6) [MONTH2]
  - (7) [MONTH3]
  - (8) [MONTH4]
  - (9) Other
  - (N) Never Received
- \_\_\_\_\_

-----  
-SURYR1-

When did [FIRST AND LAST NAME] last receive  
[INCOME TYPE]?

MONTH: \_\_

YEAR: \_\_\_\_\_

-----  
-OTHSUR-

Did [FIRST AND LAST NAME] receive income from  
any other source during this time period  
as a result of being a [WIDOW/WIDOWER]?

(1) Yes

(2) No

\_\_\_\_\_

-----  
-OSURTYP- What kind of income was that?

Anything else?

- (1) Pension from company or union including income from profit-sharing plans
- (2) Veterans' compensation or pension
- (3) Federal Civil Service or other Federal civilian employee pension
- (4) U.S. Government Railroad Retirement
- (5) State government pension
- (6) Local government pension
- (7) Income from paid-up life insurance policies or annuities
- (8) U.S. Military retirement pay. Exclude payments from the Department of Veterans Affairs (VA)
- (9) Black Lung benefits
- (10) Worker's Compensation
- (11) Payments from estate or trust
- (12) National Guard or Reserve Forces retirement
- (13) Other
- (N) None/No more

\_\_\_1 \_\_\_2 \_\_\_3 \_\_\_4 \_\_\_5 \_\_\_6 \_\_\_7 \_\_\_8 \_\_\_9 \_\_\_10 \_\_\_11 \_\_\_12 \_\_\_13

-----  
-SUROTHR-

What was the specific "other" source of income  
[FIRST AND LAST NAME] received as a [WIDOW/WIDOWER]?

\_\_\_\_\_

-----  
-FCCYN-

Did [FIRST AND LAST NAME] receive any foster  
child care?

- (1) Yes
  - (2) No
- \_\_\_\_\_

-----  
-PWFCYN-

Last time I recorded that [FIRST AND LAST NAME] received  
Foster Child Care payments.

Did [FIRST AND LAST NAME] receive any Foster Child Care  
payments at any time between [MONTH1] and today?

- (1) Yes
  - (2) No
- \_\_\_\_\_

-----  
-PWFCMTH-

In which month did [FIRST AND LAST NAME] last receive Foster Child Care payments?

- (1) [PREVIOUS WAVE MONTH1]
  - (2) [PREVIOUS WAVE MONTH2]
  - (3) [PREVIOUS WAVE MONTH3]
  - (4) [PREVIOUS WAVE MONTH4]
  - (5) [MONTH1]
  - (6) [MONTH2]
  - (7) [MONTH3]
  - (8) [MONTH4]
  - (9) Other
  - (N) Never Received
- \_\_\_\_\_

-----  
-FCCYR1-

When did [FIRST AND LAST NAME] last receive Foster Child Care payments?

MONTH: \_\_\_\_

YEAR: \_\_\_\_\_

-----  
-CSAGREE-

Have support payments ever been court ordered or informally agreed to for [CHILD NAME]?

- (1) Yes
  - (2) No
- \_\_\_\_\_

-----  
-CSYN-

Did [FIRST AND LAST NAME] receive any kind of financial support payments from the [CHILD's] other parent?

- (1) Yes
- (2) No

—

-----  
-PWCSYN-

Last time I recorded that [FIRST AND LAST NAME] received Child Support payments.

Did [FIRST AND LAST NAME] receive any Child Support payments at any time between [MONTH1] and today?

- (1) Yes
- (2) No

—

-----  
-PWCSMTH-

In which month did [FIRST AND LAST NAME] last receive Child Support payments?

- (1) [PREVIOUS WAVE MONTH1]
- (2) [PREVIOUS WAVE MONTH2]
- (3) [PREVIOUS WAVE MONTH3]
- (4) [PREVIOUS WAVE MONTH4]
- (5) [MONTH1]
- (6) [MONTH2]
- (7) [MONTH3]
- (8) [MONTH4]
- (9) Other
- (N) Never Received

—

-----  
-CSYR1-

When did [FIRST AND LAST NAME] last receive  
Child Support payments?

MONTH: \_\_

YEAR: \_\_\_\_

-----  
-ALIYN-

Did [FIRST AND LAST NAME] receive any  
alimony payments?

(1) Yes

(2) No

\_\_\_

-----  
-PWALIYN-

Last time I recorded that [FIRST AND LAST NAME] received  
Alimony payments.

Did [FIRST AND LAST NAME] receive any Alimony  
payments at any time between [MONTH1] and today?

(1) Yes

(2) No

\_\_\_

-----  
-PWALIMTH-

In which month did [FIRST AND LAST NAME] last receive Alimony payments?

- (1) [PREVIOUS WAVE MONTH1]
  - (2) [PREVIOUS WAVE MONTH2]
  - (3) [PREVIOUS WAVE MONTH3]
  - (4) [PREVIOUS WAVE MONTH4]
  - (5) [MONTH1]
  - (6) [MONTH2]
  - (7) [MONTH3]
  - (8) [MONTH4]
  - (9) Other
  - (N) Never Received
- 

-----  
-ALIYR1-

When did [FIRST AND LAST NAME] last receive Alimony payments?

MONTH: \_\_

YEAR: \_\_\_\_

-----  
-FSYN-

[WAS/WERE] [FIRST AND LAST NAME] [OR HIS/HER/YOUR WIFE/HUSBAND] authorized to receive food stamps?

- (1) Yes
  - (2) No
-

-----  
-PWFSYN-

Last time I recorded that [FIRST AND LAST NAME] [OR HIS/HER/YOUR WIFE/HUSBAND] [WAS/WERE] authorized to receive Food Stamps.

Did [FIRST AND LAST NAME] receive any Food Stamps at any time between MONTH1 and today?

- (1) Yes
- (2) No

\_\_\_\_\_

-----  
-PWFSMTH-

In which month did [FIRST AND LAST NAME] last receive Food Stamps?

- (1) [PREVIOUS WAVE MONTH1]
- (2) [PREVIOUS WAVE MONTH2]
- (3) [PREVIOUS WAVE MONTH3]
- (4) [PREVIOUS WAVE MONTH4]
- (5) [MONTH1]
- (6) [MONTH2]
- (7) [MONTH3]
- (8) [MONTH4]
- (9) Other
- (N) Never Received

\_\_\_\_\_

-----  
-FSYR1-

When did [FIRST AND LAST NAME] last receive Food Stamps?

MONTH: \_\_\_\_

YEAR: \_\_\_\_\_

-----  
-WICYN-

[ARE/IS] [FIRST AND LAST NAME] on WIC, the Womens, Infants, and Children's nutrition program?

- (1) Yes
- (2) No

—

-----  
-PWWICYN-

Last time I recorded that [FIRST AND LAST NAME] [ WAS/WERE] on WIC, the Womens, Infants, and Children's nutrition program.

[WAS/WERE] [FIRST AND LAST NAME] on WIC at any time between [MONTH1] and today?

- (1) Yes
- (2) No

—

-----  
-PWWICMTH-

In which month did [FIRST AND LAST NAME] last receive WIC benefits?

- (1) [PREVIOUS WAVE MONTH1]
- (2) [PREVIOUS WAVE MONTH2]
- (3) [PREVIOUS WAVE MONTH3]
- (4) [PREVIOUS WAVE MONTH4]
- (5) [MONTH1]
- (6) [MONTH2]
- (7) [MONTH3]
- (8) [MONTH4]
- (9) Other
- (N) Never Received

—

-----  
-WICYR1-

When did [FIRST AND LAST NAME] last receive  
WIC benefits?

MONTH: \_\_

YEAR: \_\_\_\_

-----  
-PATYN-

Did [FIRST AND LAST NAME] receive any welfare or public  
assistance payments?

(1) Yes

(2) No

\_\_\_

-----  
-PATYP-

Did HE/SHE receive:

READ ALL CATEGORIES. ENTER (N) FOR NONE/NO MORE

(1) Public Assistance Payments-formerly known as AFDC or ADC

(2) General Assistance or General Relief

(3) Energy Assistance Program

(4) Other

\_\_\_1 \_\_\_2 \_\_\_3 \_\_\_4

-----  
-PWADCYN-

Last time I recorded that [FIRST AND LAST NAME] received public assistance payments formerly know as AFDC or ADC?

Did [FIRST AND LAST NAME] receive any such assistance at any time between [MONTH1] and today?

NOTE FOR FR: DO NOT INCLUDE ANY ENERGY ASSISTANCE

- (1) Yes
- (2) No

—

-----  
-PWADCMTH-

In which month did [FIRST AND LAST NAME] last receive AFDC?

- (1) [PREVIOUS WAVE MONTH1]
- (2) [PREVIOUS WAVE MONTH2]
- (3) [PREVIOUS WAVE MONTH3]
- (4) [PREVIOUS WAVE MONTH4]
- (5) [MONTH1]
- (6) [MONTH2]
- (7) [MONTH3]
- (8) [MONTH4]
- (9) Other
- (N) Never Received

—

-----  
-ADCYR1-

When did [FIRST AND LAST NAME] last receive  
this assistance?

MONTH: \_\_

YEAR: \_\_\_\_

-----  
-PWGAYN-

Last time I recorded that [FIRST AND LAST NAME][OR HIS/HER/YOUR WIFE/HUSBAND]  
received General Assistance.

Did [FIRST AND LAST NAME] receive any General Assistance  
at any time between [ MONTH1] and today?

- (1) Yes
- (2) No

\_\_\_\_\_

-----  
-PWGAMTH-

In which month did [FIRST AND LAST NAME] last receive  
General Assistance?

- (1) [PREVIOUS WAVE MONTH1]
- (2) [PREVIOUS WAVE MONTH2]
- (3) [PREVIOUS WAVE MONTH3]
- (4) [PREVIOUS WAVE MONTH4]
- (5) [MONTH1]
- (6) [MONTH2]
- (7) [MONTH3]
- (8) [MONTH4]
- (9) Other
- (N) Never Received

\_\_\_\_\_

-----  
-GAYR1-

When did [FIRST AND LAST NAME] last receive  
General Assistance?

MONTH: \_\_

YEAR: \_\_\_\_

-----  
-PWEAYN-

Last time I recorded that [FIRST AND LAST NAME] [OR HIS/HER/YOUR  
WIFE/HUSBAND] received Energy Assistance.

Did [FIRST AND LAST NAME] receive any Energy Assistance  
at any time between [ MONTH1] and today?

- (1) Yes
- (2) No

\_\_\_\_\_

-----  
-PWEAMTH-

In which month did [FIRST AND LAST NAME] last receive Energy Assistance?

- (1) [PREVIOUS WAVE MONTH1]
- (2) [PREVIOUS WAVE MONTH2]
- (3) [PREVIOUS WAVE MONTH3]
- (4) [PREVIOUS WAVE MONTH4]
- (5) [MONTH1]
- (6) [MONTH2]
- (7) [MONTH3]
- (8) [MONTH4]
- (9) Other
- (N) Never Received

\_\_\_\_\_

-----  
-EAYR1-

When did [FIRST AND LAST NAME] last receive  
Energy Assistance?

MONTH: \_\_

YEAR: \_\_\_\_\_

-----  
-PATYP2-

Since MONTH1 1st, did [FIRST AND LAST NAME]  
[OR HIS/HER/YOUR WIFE/HUSBAND] receive any:  
ENTER (N) FOR NONE/NO MORE

- (1) [Public Assistance payments formerly know as AFDC or ADC]
- (2) [General Assistance or General Relief]
- (3) [Energy Assistance]
- (4) Other

\_\_1 \_\_2 \_\_3 \_\_4

-  
-----  
-PAOTHR-

What was the specific "other" source of  
public assistance income?

\_\_\_\_\_

-----  
-PSSTHRU-

Did [FIRST AND LAST NAME] receive ANY  
child support as a bonus or pass thru  
from a public assistance agency?

- (1) Yes
- (2) No

\_\_\_\_\_

-----  
-PWPSYN-

Last time I recorded that [FIRST AND LAST NAME] received child support as a bonus or pass thru from a public assistance agency?

Did [FIRST AND LAST NAME] receive any Pass Thru Child Support payments of this type at any time between [MONTH1] and today?

- (1) Yes
- (2) No

—

-----  
-PWPSMTH-

In which month did [FIRST AND LAST NAME] last receive pass thru child support payments?

- (1) [PREVIOUS WAVE MONTH1]
- (2) [PREVIOUS WAVE MONTH2]
- (3) [PREVIOUS WAVE MONTH3]
- (4) [PREVIOUS WAVE MONTH4]
- (5) [MONTH1]
- (6) [MONTH2]
- (7) [MONTH3]
- (8) [MONTH4]
- (9) Other
- (N) Never Received

—

-----  
-PSYR1-

When did [FIRST AND LAST NAME] last receive pass thru child support payments?

MONTH: \_\_\_\_

YEAR: \_\_\_\_\_

-----  
-NOINC-

Did [FIRST AND LAST NAME] receive any non-job income from some source we have not covered, such as financial help from someone outside this household, payments from the government, or anything else?

- (1) Yes
- (2) No

\_\_\_\_\_

-----  
-INCLIST- I have recorded that, between [MONTH1 1st] and today, [FIRST AND LAST NAME] had the following sources of non-job income: (READ NAMES OF INCOME SOURCES)  
PRESS "SHIFT-F6" TO ACCESS INCOME SOURCES LISTED IN BOX BELOW. PRESS "SHIFT-F6" AGAIN TO RETURN TO THIS POINT.

Have I listed anything that SHOULD NOT be there?

- (1) Yes
- (2) No \_\_\_\_\_

-----  
-ERRSRC-

Which of these?

(N) None/No more

\_\_\_1 \_\_\_2 \_\_\_3  
\_\_\_4 \_\_\_5 \_\_\_6

-----  
-ANYOTH-

Did [FIRST AND LAST NAME] receive income from any source, such as financial help from someone outside the household, payments from the government, or any other program income?

NOTE TO FR: DO NOT ANSWER 'YES' FOR ANY TYPES OF ASSET-BASED INCOME, WHICH WILL BE COVERED IN THE NEXT SECTION.

- (1) Yes
- (2) No

—

-----  
-OTHSRCE- PRESS "SHIFT-F6" TO ACCESS INCOME SOURCES LISTED IN BOX BELOW. PRESS "SHIFT-F6" AGAIN TO RETURN TO THIS POINT.

What kind of income did [FIRST AND LAST NAME] receive?  
ENTER NUMERIC CODE OF INCOME SOURCE REPORTED

ANYTHING ELSE?  
(N) None/No more

\_\_1 \_\_2 \_\_3 \_\_4

## Assets, Part 1 - Identifying Ownership of Income Producing Assets

---

-ASSTINT-

These next questions are about assets that provide income.

PRESS "ENTER" TO CONTINUE

---

-A2- During our last visit, we recorded that you owned, either alone or jointly, the following assets:

[LIST OF ASSET TYPES]

PRESS "ENTER" TO CONTINUE

---

-ASSET1- During the period from [Month 1] through today, did you own, either alone or jointly, any of the following: (SHOW FLASHCARD F) READ EACH CATEGORY. ASSETS IN REVERSE VIDEO INDICATE OWNED IN PREVIOUS WAVE.

(1) Yes (2) No (N) No Assets

[LIST OF ASSET TYPES]

---

-OTHFIN- Enter the "other financial investment"

-----

---

-ASETDRAW-

Have you received any lump sum or regular distribution payments from your [IRA OR KEOUGH ACCOUNTS/401K OR THRIFT PLAN] since [MONTH1] 1ST?

- (1) Lump Sum
  - (2) Regular Distributions
  - (3) Both
  - (4) No, no payments received
-

**Labor Force, Part 2 - Income Received from Jobs/Businesses**

---

-PYRCV-

The next questions are about the income [FIRST AND LAST NAME] received [FROM ANY JOBS OR BUSINESSES].

The questions ask about [HIS/HER] gross income BEFORE any deductions for taxes, health insurance, and so on. [PLEASE INCLUDE MILITARY CASH HOUSING ALLOWANCES AND ANY OTHER] [SPECIAL TYPES OF MILITARY PAY]

PRESS ENTER TO CONTINUE

—

---

-P1M4-

Each time [HE/SHE] [WAS/WERE] paid by [HIS/HER JOB OR BUSINESS] in [MONTH4], how much did [HE/SHE] receive BEFORE deductions?

- (P) Proceed to enter one or more gross amounts for the month [RESPONDENT REPORTS AN ANNUAL SALARY]
- (C) Calculate - Respondent reports hourly wages and hours worked

—

ENTER GROSS AMOUNTS RECEIVED IN [MONTH4] OR (N) FOR NONE. (AFTER LAST REPORTED AMOUNT ASK --)  
Anything else? Any tips, bonuses, overtime pay, or commissions?

- (ENTER (N) AFTER LAST REPORTED AMOUNT)
- (S) Same as last amount entered

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

-----  
-FOLLOW4-

Is that the total for the month or the amount of a single payment?

- (1) Total for the month
- (2) Amount of a single payment

\_\_\_\_\_

-----  
-MOREPAY4-

Please tell me the other payments you received in [MONTH4] from [HIS/HER JOB OR BUSINESS].

ENTER (N) FOR NONE OR NO MORE.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

-----  
-MTOT4VER-

NOTE TO INTERVIEWER - DO NOT READ

The total amount reported for [MONTH4], [TOTAL PAYMENT AMOUNT], is unusually large.

If the amount is correct, enter P to proceed.

If the amount is incorrect, hit F1 to back up and correct it.

(P) Proceed

\_\_\_\_\_

-----  
-CALC41-

ENTER PAY RATE AND TOTAL HOURS WORKED AT THAT RATE IN MONTH

PAY RATE:    \_\_\_ Dollars and \_\_\_ Cents

TOTAL HOURS WORKED AT THIS RATE IN THE MONTH:  \_\_\_

IF NEEDED, ENTER SECOND PAY RATE AND TOTAL HOURS AT THAT RATE IN THE MONTH (ENTER (N) IF SECOND PAY RATE IS NOT NEEDED)

PAY RATE:    \_\_\_ Dollars and \_\_\_ Cents

TOTAL HOURS WORKED AT THIS RATE IN THE MONTH:  \_\_\_

-----  
-CALC41VR-

That comes to [CALCULATED MONTHLY PAY].

Does that sound about right?

IF CORRECT ENTER P TO PROCEED

IF NOT CORRECT HIT F1 TO BACK UP AND MAKE CORRECTIONS

(P) Proceed

\_\_\_

-----  
-MORPAY41-

I have recorded that [HIS/HER] earnings for [MONTH4] are:

[EARNINGS FOR PAY PERIOD1]

[NOTE1]

[NOTE2]

Did [FIRST AND LAST NAME] receive any other pay in [MONTH4] from [NAME OF EMPLOYER]?

(1) Yes

(2) No

\_\_\_

-----  
-CALC42-

ENTER PAY RATE AND TOTAL HOURS WORKED AT THAT RATE IN MONTH

PAY RATE: \_\_\_ Dollars and \_\_\_ Cents

TOTAL HOURS WORKED AT THIS RATE IN THE MONTH: \_\_\_

IF NEEDED, ENTER SECOND PAY RATE AND TOTAL HOURS AT THAT RATE IN THE MONTH

(ENTER (N) IF SECOND PAY RATE IS NOT NEEDED)

PAY RATE: \_\_\_ Dollars and \_\_\_ Cents

TOTAL HOURS WORKED AT THIS RATE IN THE MONTH: \_\_\_

-----  
-CALC42VR-

That comes to [MONTHLY PAY].

Does that sound about right?

IF CORRECT ENTER P TO PROCEED

IF NOT CORRECT HIT F1 TO BACK UP AND MAKE CORRECTIONS

(P) Proceed

\_\_\_

-----  
-MORPAY42-

I have recorded that [HIS/HER] earnings for [MONTH4]  
are:

[EARNINGS FOR PAY PERIOD1]

[EARNINGS FOR PAY PERIOD2]

Did [FIRST AND LAST NAME] receive any other pay in  
[MONTH4] from [NAME OF EMPLOYER]?

(1) Yes

(2) No

\_\_\_

-----  
-CALC43-

ENTER PAY RATE AND TOTAL HOURS WORKED AT THAT RATE IN MONTH

PAY RATE: \_\_\_ Dollars and \_\_\_ Cents

TOTAL HOURS WORKED AT THIS RATE IN THE MONTH: \_\_\_

IF NEEDED, ENTER SECOND PAY RATE AND TOTAL HOURS AT THAT RATE IN THE MONTH

(ENTER (N) IF SECOND PAY RATE IS NOT NEEDED)

PAY RATE: \_\_\_ Dollars and \_\_\_ Cents

TOTAL HOURS WORKED AT THIS RATE IN THE MONTH: \_\_\_

-----  
-CALC43VR-

That comes to [MONTHLY PAY].

Does that sound about right?

IF CORRECT ENTER (P) TO PROCEED

IF NOT CORRECT HIT F1 TO BACK UP AND MAKE CORRECTIONS

(P) Proceed

\_\_\_

-----  
-MORPAY43-

I have recorded that [HIS/HER] earnings for [MONTH4]  
are:

[EARNINGS FOR PAY PERIOD1]

[EARNINGS FOR PAY PERIOD2]

[EARNINGS FOR PAY PERIOD3]

[NOTE1]

[NOTE2]

Did [FIRST AND LAST NAME] receive any other pay in  
[MONTH4] from [NAME OF EMPLOYER]?

(1) Yes

(2) No

\_\_\_

-----  
-CALC44-

ENTER PAY RATE AND TOTAL HOURS WORKED AT THAT RATE IN MONTH

PAY RATE: \_\_\_ Dollars and \_\_\_ Cents

TOTAL HOURS WORKED AT THIS RATE IN THE MONTH: \_\_\_

IF NEEDED, ENTER SECOND PAY RATE AND TOTAL HOURS AT THAT RATE IN THE MONTH

(ENTER (N) IF SECOND PAY RATE IS NOT NEEDED)

PAY RATE: \_\_\_ Dollars and \_\_\_ Cents

TOTAL HOURS WORKED AT THIS RATE IN THE MONTH: \_\_\_

-----  
-CALC44VR-

That comes to [MONTHLY PAY].

Does that sound about right?

IF CORRECT ENTER (P) TO PROCEED

IF NOT CORRECT HIT F1 TO BACK UP AND MAKE CORRECTIONS

(P) Proceed

\_\_\_

-----  
-MORPAY44-

I have recorded that [HIS/HER] earnings for [MONTH4]  
are:

[EARNINGS FOR PAY PERIOD1]

[EARNINGS FOR PAY PERIOD2]

[EARNINGS FOR PAY PERIOD3]

[EARNINGS FOR PAY PERIOD4]

[NOTE1]

[NOTE2]

Did [FIRST AND LAST NAME] receive any other pay in  
[MONTH4] from [NAME OF EMPLOYER]?

(1) Yes

(2) No

\_\_\_

-----  
-CALC45-

ENTER PAY RATE AND TOTAL HOURS WORKED AT THAT RATE IN MONTH

PAY RATE: \_\_\_ Dollars and \_\_\_ Cents

TOTAL HOURS WORKED AT THIS RATE IN THE MONTH: \_\_\_

IF NEEDED, ENTER SECOND PAY RATE AND TOTAL HOURS AT THAT RATE IN THE MONTH

(ENTER (N) IF SECOND PAY RATE IS NOT NEEDED)

PAY RATE: \_\_\_ Dollars and \_\_\_ Cents

TOTAL HOURS WORKED AT THIS RATE IN THE MONTH: \_\_\_

-----  
-CALC45VR-

That comes to [MONTHLY PAY].

Does that sound about right?

IF CORRECT ENTER (P) TO PROCEED

IF NOT CORRECT HIT F1 TO BACK UP AND MAKE CORRECTIONS

(P) Proceed

\_\_\_

-----  
-PAYTMS4-

(NOTE TO INTERVIEWER - DO NOT READ)

Based on the PAY PERIOD and the DATE LAST PAID,  
the respondent should have been paid [NUMBER OF PAYDAYS] times  
in [MONTH4].

Probe for additional payments.

If additional amounts are reported, back up (F1) to  
enter additional amounts.

If there are no additional amounts, enter P to proceed.

(P) Proceed

\_\_\_

-----  
-ANAMT-

ENTER THE AMOUNT EARNED PER YEAR

\_\_\_\_\_

-----  
-P1M3-

Each time [HE/SHE] [WAS/WERE] paid by [HIS/HER JOB OR BUSINESS] in [MONTH3], how much did [HE/SHE] receive BEFORE deductions?

(P) Proceed to enter one or more gross amounts for the month

(C) Calculate - Respondent reports hourly wages and hours worked

\_\_\_\_\_

ENTER GROSS AMOUNTS RECEIVED IN [MONTH3] OR (N) FOR NONE.  
(AFTER LAST REPORTED AMOUNT ASK --)

Anything else? Any tips, bonuses, overtime pay, or commissions?

(ENTER (N) AFTER LAST REPORTED AMOUNT)

(S) Same as last amount entered

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

-----  
-FOLLOW3-

Is that the total for the month or the amount of a single payment?

(1) Total for the month

(2) Amount of a single payment

\_\_\_\_\_

-----  
-MOREPAY3-

Please tell me the other payments you received in  
[MONTH3] from [HIS/HER JOB OR BUSINESS].

ENTER (N) FOR NONE OR NO MORE.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

-----  
-MTOT3VER-

NOTE TO INTERVIEWER - DO NOT READ

The total amount reported for [MONTH3],  
[TOTAL PAYMENT AMOUNT],  
is unusually large.

If the amount is correct, enter P to proceed.  
If the amount is incorrect, hit F1 to back up and correct it.

(P) Proceed

\_\_\_\_\_

-----  
-CALC31-

ENTER PAY RATE AND TOTAL HOURS WORKED AT THAT RATE IN MONTH

PAY RATE: \_\_\_\_ Dollars and \_\_\_\_ Cents  
TOTAL HOURS WORKED AT THIS RATE IN THE MONTH: \_\_\_\_

IF NEEDED, ENTER SECOND PAY RATE AND TOTAL HOURS AT THAT RATE IN THE  
MONTH  
(ENTER (N) IF SECOND PAY RATE IS NOT NEEDED)

PAY RATE: \_\_\_\_ Dollars and \_\_\_\_ Cents  
TOTAL HOURS WORKED AT THIS RATE IN THE MONTH: \_\_\_\_

-----  
-CALC31VR-

That comes to [MONTHLY PAY].  
Does that sound about right?

IF CORRECT ENTER (P) TO PROCEED  
IF NOT CORRECT HIT F1 TO BACK UP AND MAKE CORRECTIONS

(P) Proceed

—

-----  
-MORPAY31-

I have recorded that [HIS/HER] earnings for [MONTH3]  
are:

[EARNINGS FOR MONTH3]

[NOTE1]

[NOTE2]

Did [FIRST AND LAST NAME] receive any other pay in  
[MONTH3] from [NAME OF EMPLOYER]?

- (1) Yes
- (2) No

—

-----  
-CALC32-

ENTER PAY RATE AND TOTAL HOURS WORKED AT THAT RATE IN MONTH

PAY RATE: \_\_\_ Dollars and \_\_\_ Cents

TOTAL HOURS WORKED AT THIS RATE IN THE MONTH: \_\_\_

IF NEEDED, ENTER SECOND PAY RATE AND TOTAL HOURS AT THAT RATE IN THE  
MONTH

(ENTER (N) IF SECOND PAY RATE IS NOT NEEDED)

PAY RATE: \_\_\_ Dollars and \_\_\_ Cents

TOTAL HOURS WORKED AT THIS RATE IN THE MONTH: \_\_\_

-----  
-CALC32VR-

That comes to [MONTHLY PAY].

Does that sound about right?

IF CORRECT ENTER (P) TO PROCEED

IF NOT CORRECT HIT F1 TO BACK UP AND MAKE CORRECTIONS

(P) Proceed

—

-----  
-MORPAY32-

I have recorded that [HIS/HER] earnings for [MONTH3]  
are:

[EARNINGS FOR PAY PERIOD1]

[EARNINGS FOR PAY PERIOD2]

[NOTE1]

[NOTE2]

Did [FIRST AND LAST NAME] receive any other pay in  
[MONTH3] from [NAME OF EMPLOYER]?

(1) Yes

(2) No

—

-----  
-CALC33-

ENTER PAY RATE AND TOTAL HOURS WORKED AT THAT RATE IN MONTH

PAY RATE: \_\_\_ Dollars and \_\_\_ Cents

TOTAL HOURS WORKED AT THIS RATE IN THE MONTH: \_\_\_

IF NEEDED, ENTER SECOND PAY RATE AND TOTAL HOURS AT THAT RATE IN THE MONTH

(ENTER (N) IF SECOND PAY RATE IS NOT NEEDED)

PAY RATE: \_\_\_ Dollars and \_\_\_ Cents

TOTAL HOURS WORKED AT THIS RATE IN THE MONTH: \_\_\_

-----  
-CALC33VR-

That comes to [MONTHLY PAY].

Does that sound about right?

IF CORRECT ENTER (P) TO PROCEED

IF NOT CORRECT HIT F1 TO BACK UP AND MAKE CORRECTIONS

(P) Proceed

\_\_\_

-----  
-MORPAY33-

I have recorded that [HIS/HER] earnings for [MONTH3]  
are:

[EARNINGS FOR PAY PERIOD1]

[EARNINGS FOR PAY PERIOD2]

[EARNINGS FOR PAY PERIOD3]

[EARNINGS FOR PAY PERIOD4]

[NOTE1]

[NOTE2]

Did [FIRST AND LAST NAME] receive any other pay in  
[MONTH3] from [NAME OF EMPLOYER]?

(1) Yes

(2) No

\_\_\_

-----  
-CALC34-

ENTER PAY RATE AND TOTAL HOURS WORKED AT THAT RATE IN MONTH

PAY RATE: \_\_\_ Dollars and \_\_\_ Cents

TOTAL HOURS WORKED AT THIS RATE IN THE MONTH: \_\_\_

IF NEEDED, ENTER SECOND PAY RATE AND TOTAL HOURS AT THAT RATE IN THE MONTH

(ENTER (N) IF SECOND PAY RATE IS NOT NEEDED)

PAY RATE: \_\_\_ Dollars and \_\_\_ Cents

TOTAL HOURS WORKED AT THIS RATE IN THE MONTH: \_\_\_

-----  
-CALC34VR-

That comes to [MONTHLY PAY].

Does that sound about right?

IF CORRECT ENTER (P) TO PROCEED

IF NOT CORRECT HIT F1 TO BACK UP AND MAKE CORRECTIONS

(P) Proceed

\_\_\_

-----  
-MORPAY34-

I have recorded that [HIS/HER] earnings for [MONTH3]  
are:

[EARNINGS FOR PAY PERIOD1]

[EARNINGS FOR PAY PERIOD2]

[EARNINGS FOR PAY PERIOD3]

[NOTE1]

[NOTE2]

Did [FIRST AND LAST NAME] receive any other pay in  
[MONTH3] from [NAME OF EMPLOYER]?

(1) Yes

(2) No

\_\_\_

-----  
-CALC35-

ENTER PAY RATE AND TOTAL HOURS WORKED AT THAT RATE IN MONTH

PAY RATE: \_\_\_ Dollars and \_\_\_ Cents

TOTAL HOURS WORKED AT THIS RATE IN THE MONTH: \_\_\_

IF NEEDED, ENTER SECOND PAY RATE AND TOTAL HOURS AT THAT RATE IN THE MONTH

(ENTER (N) IF SECOND PAY RATE IS NOT NEEDED)

PAY RATE: \_\_\_ Dollars and \_\_\_ Cents

TOTAL HOURS WORKED AT THIS RATE IN THE MONTH: \_\_\_  
-----

-CALC35VR-

That comes to [MONTHLY PAY].

Does that sound about right?

IF CORRECT ENTER (P) TO PROCEED

IF NOT CORRECT HIT F1 TO BACK UP AND MAKE CORRECTIONS

(P) Proceed  
  
\_\_\_\_\_  
-----

-PAYTMS3-

(NOTE TO INTERVIEWER - DO NOT READ)

Based on the PAY PERIOD and the DATE LAST PAID,  
the respondent should have been paid [NUMBER OF PAY DAYS] times  
in [MONTH3].

Probe for additional payments.

If additional amounts are reported, back up (F1) to  
enter additional amounts.

If there are no additional amounts, enter P to proceed.

(P) Proceed  
  
\_\_\_\_\_  
-----

-----  
-P1M2-

Each time [HE/SHE] [WAS/WERE] paid by [HIS/HER JOB OR BUSINESS] in [MONTH2], how much did [HE/SHE] receive BEFORE deductions?

- (P) Proceed to enter one or more gross amounts for the month
- (C) Calculate - Respondent reports hourly wages and hours worked

\_\_\_\_\_

ENTER GROSS AMOUNTS RECEIVED IN [MONTH2] OR (N) FOR NONE.  
(AFTER LAST REPORTED AMOUNT ASK --)

Anything else? Any tips, bonuses, overtime pay, or commissions?

(ENTER (N) AFTER LAST REPORTED AMOUNT)

- (S) Same as last amount entered

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

-----  
-FOLLOW2-

Is that the total for the month or the amount of a single payment?

- (1) Total for the month
- (2) Amount of a single payment

\_\_\_\_\_

-----  
-MOREPAY2-

Please tell me the other payments you received in [MONTH2] from [HIS/HER JOB OR BUSINESS].

ENTER (N) FOR NONE OR NO MORE.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

-----  
-MTOT2VER-

NOTE TO INTERVIEWER - DO NOT READ

The total amount reported for [MONTH2],  
[TOTAL PAYMENT AMOUNT], is unusually large.

If the amount is correct, enter P to proceed.  
If the amount is incorrect, hit F1 to back up and correct it.

(P) Proceed

\_\_\_\_\_

-----  
-CALC21-

ENTER PAY RATE AND TOTAL HOURS WORKED AT THAT RATE IN MONTH

PAY RATE: \_\_\_\_ Dollars and \_\_\_\_ Cents  
TOTAL HOURS WORKED AT THIS RATE IN THE MONTH: \_\_\_\_

IF NEEDED, ENTER SECOND PAY RATE AND TOTAL HOURS AT THAT RATE IN THE  
MONTH  
(ENTER (N) IF SECOND PAY RATE IS NOT NEEDED)

PAY RATE: \_\_\_\_ Dollars and \_\_\_\_ Cents  
TOTAL HOURS WORKED AT THIS RATE IN THE MONTH: \_\_\_\_

-----  
-CALC21VR-

That comes to [MONTHLY PAY].  
Does that sound about right?

IF CORRECT ENTER (P) TO PROCEED  
IF NOT CORRECT HIT F1 TO BACK UP AND MAKE CORRECTIONS

(P) Proceed

\_\_\_\_\_

-----  
-MORPAY21-

I have recorded that [HIS/HER] earnings for [MONTH2]  
are:  
[EARNINGS FOR MONTH2]

[NOTE1]  
[NOTE2]

Did [FIRST AND LAST NAME] receive any other pay in  
[MONTH2] from [NAME OF EMPLOYER]?

- (1) Yes
- (2) No

\_\_\_\_\_

-----  
-CALC22-

ENTER PAY RATE AND TOTAL HOURS WORKED AT THAT RATE IN MONTH

PAY RATE: \_\_\_\_ Dollars and \_\_\_\_ Cents  
TOTAL HOURS WORKED AT THIS RATE IN THE MONTH: \_\_\_\_

IF NEEDED, ENTER SECOND PAY RATE AND TOTAL HOURS AT THAT RATE IN THE  
MONTH  
(ENTER (N) IF SECOND PAY RATE IS NOT NEEDED)

PAY RATE: \_\_\_\_ Dollars and \_\_\_\_ Cents  
TOTAL HOURS WORKED AT THIS RATE IN THE MONTH: \_\_\_\_

-----  
-CALC22VR-

That comes to [MONTHLY PAY].  
Does that sound about right?

IF CORRECT ENTER (P) TO PROCEED  
IF NOT CORRECT HIT F1 TO BACK UP AND MAKE CORRECTIONS

(P) Proceed

\_\_\_\_\_

-----  
-MORPAY22-

I have recorded that [HIS/HER] earnings for [MONTH2]  
are:

[EARNINGS FOR PAY PERIOD1]  
[EARNINGS FOR PAY PERIOD2]

[NOTE1]  
[NOTE2]

Did [FIRST AND LAST NAME] receive any other pay in  
[MONTH2] from [NAME OF EMPLOYER]?

- (1) Yes
- (2) No

\_\_\_\_\_

-----  
-CALC23-

ENTER PAY RATE AND TOTAL HOURS WORKED AT THAT RATE IN MONTH

PAY RATE: \_\_\_\_ Dollars and \_\_\_\_ Cents  
TOTAL HOURS WORKED AT THIS RATE IN THE MONTH: \_\_\_\_

IF NEEDED, ENTER SECOND PAY RATE AND TOTAL HOURS AT THAT RATE IN THE  
MONTH  
(ENTER (N) IF SECOND PAY RATE IS NOT NEEDED)

PAY RATE: \_\_\_\_ Dollars and \_\_\_\_ Cents  
TOTAL HOURS WORKED AT THIS RATE IN THE MONTH: \_\_\_\_

-----  
-CALC23VR-

That comes to [MONTHLY PAY].  
Does that sound about right?

IF CORRECT ENTER (P) TO PROCEED  
IF NOT CORRECT HIT F1 TO BACK UP AND MAKE CORRECTIONS

(P) Proceed

\_\_\_\_\_

-----  
-MORPAY23-

I have recorded that [HIS/HER] earnings for [MONTH2]  
are:

[EARNINGS FOR PAY PERIOD1]

[EARNINGS FOR PAY PERIOD2]

[EARNINGS FOR PAY PERIOD3]

[NOTE1]

[NOTE2]

Did [FIRST AND LAST NAME] receive any other pay in  
[MONTH2] from [NAME OF EMPLOYER]?

(1) Yes

(2) No

\_\_\_\_

-----  
-CALC24-

ENTER PAY RATE AND TOTAL HOURS WORKED AT THAT RATE IN MONTH

PAY RATE: \_\_\_\_ Dollars and \_\_\_\_ Cents

TOTAL HOURS WORKED AT THIS RATE IN THE MONTH: \_\_\_\_

IF NEEDED, ENTER SECOND PAY RATE AND TOTAL HOURS AT THAT RATE IN THE  
MONTH

(ENTER (N) IF SECOND PAY RATE IS NOT NEEDED)

PAY RATE: \_\_\_\_ Dollars and \_\_\_\_ Cents

TOTAL HOURS WORKED AT THIS RATE IN THE MONTH: \_\_\_\_

-----  
-CALC24VR-

That comes to [MONTHLY PAY].

Does that sound about right?

IF CORRECT ENTER (P) TO PROCEED

IF NOT CORRECT HIT F1 TO BACK UP AND MAKE CORRECTIONS

(P) Proceed

\_\_\_\_

-----  
-MORPAY24-

I have recorded that [HIS/HER] earnings for [MONTH2]  
are:

[EARNINGS FOR PAY PERIOD1]  
[EARNINGS FOR PAY PERIOD2]  
[EARNINGS FOR PAY PERIOD3]  
[EARNINGS FOR PAY PERIOD4]

[NOTE1]  
[NOTE2]

Did [FIRST AND LAST NAME] receive any other pay in  
[MONTH2] from [FIRST AND LAST NAME]?

- (1) Yes
- (2) No

\_\_\_\_\_

-----  
-CALC25-

ENTER PAY RATE AND TOTAL HOURS WORKED AT THAT RATE IN MONTH

PAY RATE: \_\_\_\_ Dollars and \_\_\_\_ Cents

TOTAL HOURS WORKED AT THIS RATE IN THE MONTH: \_\_\_\_

IF NEEDED, ENTER SECOND PAY RATE AND TOTAL HOURS AT THAT RATE IN THE  
MONTH

(ENTER (N) IF SECOND PAY RATE IS NOT NEEDED)

PAY RATE: \_\_\_\_ Dollars and \_\_\_\_ Cents

TOTAL HOURS WORKED AT THIS RATE IN THE MONTH: \_\_\_\_

-----  
-CALC25VR-

That comes to [MONTHLY PAY].

Does that sound about right?

IF CORRECT ENTER (P) TO PROCEED

IF NOT CORRECT HIT F1 TO BACK UP AND MAKE CORRECTIONS

(P) Proceed

—

-----  
-PAYTMS2-

(NOTE TO INTERVIEWER - DO NOT READ)

Based on the PAY PERIOD and the DATE LAST PAID,  
the respondent should have been paid [NUMBER OF PAY DAYS] times  
in [MONTH2].

Probe for additional payments.

If additional amounts are reported, back up (F1) to  
enter additional amounts.

If there are no additional amounts, enter P to proceed.

(P) Proceed

—

-----  
-P1M1-

Each time [HE/SHE] [WAS/WERE] paid by [HIS/HER JOB OR BUSINESS] in [MONTH1], how much did [HE/SHE] receive BEFORE deductions?

- (P) Proceed to enter one or more gross amounts for the month
- (C) Calculate - Respondent reports hourly wages and hours worked

\_\_\_\_\_  
ENTER GROSS AMOUNTS RECEIVED IN [MONTH1] OR (N) FOR NONE.  
(AFTER LAST REPORTED AMOUNT ASK --)

Anything else? Any tips, bonuses, overtime pay, or commissions?

- (ENTER (N) AFTER LAST REPORTED AMOUNT)
- (S) Same as last amount entered

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

-----  
-FOLLOW1-

Is that the total for the month or the amount of a single payment?

- (1) Total for the month
- (2) Amount of a single payment

\_\_\_\_\_

-----  
-MOREPAY1-

Please tell me the other payments you received in [MONTH1] from [HIS/HER JOB OR BUSINESS].

ENTER (N) FOR NONE OR NO MORE.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

-----  
-MTOT1VER-

NOTE TO INTERVIEWER - DO NOT READ

The total amount reported for [MONTH1],  
[TOTAL PAYMENT AMOUNT],  
is unusually large.

If the amount is correct, enter P to proceed.  
If the amount is incorrect, hit F1 to back up and correct it.

(P) Proceed

—

-----  
-CALC11-

ENTER PAY RATE AND TOTAL HOURS WORKED AT THAT RATE IN MONTH

PAY RATE: \_\_\_ Dollars and \_\_\_ Cents  
TOTAL HOURS WORKED AT THIS RATE IN THE MONTH: \_\_\_

IF NEEDED, ENTER SECOND PAY RATE AND TOTAL HOURS AT THAT RATE IN THE  
MONTH  
(ENTER (N) IF SECOND PAY RATE IS NOT NEEDED)

PAY RATE: \_\_\_ Dollars and \_\_\_ Cents  
TOTAL HOURS WORKED AT THIS RATE IN THE MONTH: \_\_\_

-----  
-CALC11VR-

That comes to [MONTHLY PAY].  
Does that sound about right?

IF CORRECT ENTER (P) TO PROCEED  
IF NOT CORRECT HIT F1 TO BACK UP AND MAKE CORRECTIONS

(P) Proceed

—

-----  
-MORPAY11-

I have recorded that [HIS/HER] earnings for [MONTH1]  
are:

[EARNINGS FOR MONTH1]

[NOTE1]

[NOTE2]

Did [FIRST AND LAST NAME] receive any other pay in  
[MONTH1] from [NAME OF EMPLOYER]?

(1) Yes

(2) No

\_\_\_\_\_

-----  
-CALC12-

ENTER PAY RATE AND TOTAL HOURS WORKED AT THAT RATE IN MONTH

PAY RATE: \_\_\_\_ Dollars and \_\_\_\_ Cents

TOTAL HOURS WORKED AT THIS RATE IN THE MONTH: \_\_\_\_

IF NEEDED, ENTER SECOND PAY RATE AND TOTAL HOURS AT THAT RATE IN THE  
MONTH

(ENTER (N) IF SECOND PAY RATE IS NOT NEEDED)

PAY RATE: \_\_\_\_ Dollars and \_\_\_\_ Cents

TOTAL HOURS WORKED AT THIS RATE IN THE MONTH: \_\_\_\_

-----  
-CALC12VR-

That comes to [MONTHLY PAY].

Does that sound about right?

IF CORRECT ENTER (P) TO PROCEED

IF NOT CORRECT HIT F1 TO BACK UP AND MAKE CORRECTIONS

(P) Proceed

\_\_\_\_\_

-----  
-MORPAY12-

I have recorded that [HIS/HER] earnings for [MONTH1]  
are:

[EARNINGS FOR PAY PERIOD1]  
[EARNINGS FOR PAY PERIOD2]

[NOTE1]  
[NOTE2]

Did [FIRST AND LAST NAME] receive any other pay in  
[MONTH1] from [NAME OF EMPLOYER]?

- (1) Yes
- (2) No

\_\_\_\_\_

-----  
-CALC13-

ENTER PAY RATE AND TOTAL HOURS WORKED AT THAT RATE IN MONTH

PAY RATE: \_\_\_\_ Dollars and \_\_\_\_ Cents  
TOTAL HOURS WORKED AT THIS RATE IN THE MONTH: \_\_\_\_

IF NEEDED, ENTER SECOND PAY RATE AND TOTAL HOURS AT THAT RATE IN THE  
MONTH  
(ENTER (N) IF SECOND PAY RATE IS NOT NEEDED)

PAY RATE: \_\_\_\_ Dollars and \_\_\_\_ Cents  
TOTAL HOURS WORKED AT THIS RATE IN THE MONTH: \_\_\_\_

-----  
-CALC13VR-

That comes to [MONTHLY PAY].  
Does that sound about right?

IF CORRECT ENTER (P) TO PROCEED  
IF NOT CORRECT HIT F1 TO BACK UP AND MAKE CORRECTIONS

(P) Proceed

\_\_\_\_\_

-----  
-MORPAY13-

I have recorded that [HIS/HER] earnings for [MONTH1]  
are:

[EARNINGS FOR PAY PERIOD1]  
[EARNINGS FOR PAY PERIOD2]  
[EARNINGS FOR PAY PERIOD3]

[NOTE1]  
[NOTE2]

Did [FIRST AND LAST NAME] receive any other pay in  
[MONTH1] from [NAME OF EMPLOYER]?

- (1) Yes
- (2) No

\_\_\_\_\_

-----  
-CALC14-

ENTER PAY RATE AND TOTAL HOURS WORKED AT THAT RATE IN MONTH

PAY RATE: \_\_\_\_ Dollars and \_\_\_\_ Cents  
TOTAL HOURS WORKED AT THIS RATE IN THE MONTH: \_\_\_\_

IF NEEDED, ENTER SECOND PAY RATE AND TOTAL HOURS AT THAT RATE IN THE  
MONTH  
(ENTER (N) IF SECOND PAY RATE IS NOT NEEDED)

PAY RATE: \_\_\_\_ Dollars and \_\_\_\_ Cents  
TOTAL HOURS WORKED AT THIS RATE IN THE MONTH: \_\_\_\_

-----  
-CALC14VR-

That comes to [MONTHLY PAY].  
Does that sound about right?

IF CORRECT ENTER (P) TO PROCEED  
IF NOT CORRECT HIT F1 TO BACK UP AND MAKE CORRECTIONS

(P) Proceed

\_\_\_\_\_

-----  
-MORPAY14-

I have recorded that [HIS/HER] earnings for [MONTH1]  
are:

[EARNINGS FOR PAY PERIOD1]  
[EARNINGS FOR PAY PERIOD2]  
[EARNINGS FOR PAY PERIOD3]  
[EARNINGS FOR PAY PERIOD4]

[NOTE1]  
[NOTE2]

Did [FIRST AND LAST NAME] receive any other pay in  
[MONTH1] from [NAME OF EMPLOYER]?

- (1) Yes
- (2) No

\_\_\_\_

-----  
-CALC15-

ENTER PAY RATE AND TOTAL HOURS WORKED AT THAT RATE IN MONTH

PAY RATE: \_\_\_\_ Dollars and \_\_\_\_ Cents  
TOTAL HOURS WORKED AT THIS RATE IN THE MONTH: \_\_\_\_

IF NEEDED, ENTER SECOND PAY RATE AND TOTAL HOURS AT THAT RATE IN THE  
MONTH  
(ENTER (N) IF SECOND PAY RATE IS NOT NEEDED)

PAY RATE: \_\_\_\_ Dollars and \_\_\_\_ Cents  
TOTAL HOURS WORKED AT THIS RATE IN THE MONTH: \_\_\_\_

-----  
-CALC15VR-

That comes to [MONTHLY PAY].  
Does that sound about right?

IF CORRECT ENTER (P) TO PROCEED  
IF NOT CORRECT HIT F1 TO BACK UP AND MAKE CORRECTIONS

(P) Proceed

\_\_\_\_

---

-PAYTMS1-

(NOTE TO INTERVIEWER - DO NOT READ)

Based on the PAY PERIOD and the DATE LAST PAID,  
the respondent should have been paid [NUMBER OF PAY DAYS] times  
in [MONTH1].

Probe for additional payments.

If additional amounts are reported, back up (F1) to  
enter additional amounts.

If there are no additional amounts, enter P to proceed.

(P) Proceed

—

---

-TAKEHOME-

Just to be sure -- were the amounts you gave me for  
[MONTH4], [MONTH3], [MONTH2], [MONTH1]  
[HIS/HER] take-home pay, or were they [HIS/HER] gross  
pay BEFORE any taxes and other deductions were taken out?

- (1) Take-home pay (net, after deductions)
- (2) Gross (total) pay (before deductions)
- (3) Other

—

---

-GETGROSS-

This survey needs to get people's gross income amounts. Do you  
know [HIS/HER] gross pay amounts?

- (1) Yes
- (2) No

—

-----  
-GETRECS-

[THIS SURVEY NEEDS TO GET PEOPLE'S GROSS INCOME AMOUNTS.]

Do you have records available, such as pay stubs, that would show the gross amounts?

- (1) Yes
- (2) No

\_\_\_\_\_

-----  
-GROSSPAYM4-

What were the gross pay amounts in [MONTH4]?

ENTER (S) FOR SAME AMOUNT  
ENTER (N) AFTER ENTERING LAST AMOUNT

Old net amount(s):	New Gross amount(s):
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

-----  
-ALLGROSSM4-

\*\* DO NOT READ TO RESPONDENT \*\*

Are all amounts for [MONTH4] now GROSS amounts?

- (1) Yes, all amounts are gross
- (2) No, some net amounts remain

\_\_\_\_\_

-----  
-GROSSPAYM3-

What were the gross pay amounts in [MONTH3]?

ENTER (S) FOR SAME AMOUNT

ENTER (N) AFTER ENTERING LAST AMOUNT

Old net amount(s):      New Gross amount(s):

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

-----  
-ALLGROSSM3-

\*\* DO NOT READ TO RESPONDENT \*\*

Are all amounts for [MONTH3] now GROSS amounts?

(1) Yes, all amounts are gross

(2) No, some net amounts remain

\_\_\_\_\_

-----  
-GROSSPAYM2-

What were the gross pay amounts in [MONTH2]?

ENTER (S) FOR SAME AMOUNT

ENTER (N) AFTER ENTERING LAST AMOUNT

Old net amount(s):              New Gross amount(s):

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

-----  
-ALLGROSSM2-

\*\* DO NOT READ TO RESPONDENT \*\*

Are all amounts for [MONTH2] now GROSS amounts?

- (1) Yes, all amounts are gross
- (2) No, some net amounts remain

\_\_\_\_\_

-----  
-GROSSPAYM1-

What were the gross pay amounts in [MONTH1]?

ENTER (S) FOR SAME AMOUNT  
ENTER (N) AFTER ENTERING LAST AMOUNT

Old net amount(s):	New Gross amount(s):
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

-----  
-ALLGROSSM1-

\*\* DO NOT READ TO RESPONDENT \*\*

Are all amounts for [MONTH1] now GROSS amounts?

- (1) Yes, all amounts are gross
- (2) No, some net amounts remain

\_\_\_\_\_

---

-CALLGROS-

If I were to call back later, would you be able to obtain a pay stub or some other record that shows [HIS/HER] [REMAINING] gross pay amounts?

- (1) Yes
  - (2) No
- 

---

-CBPY1-

It is very important that we collect information about income amounts that is as complete and accurate as possible. If I were to call back later, would you or someone else be able to provide me with this information?

- (1) Yes
  - (2) No
- 

---

-ADINCSRCE- Let me review all the income sources you reported.

Earlier I recorded you received income from--  
PRESS "SHIFT-F6" TO ACCESS INCOME SOURCES LISTED  
IN BOX BELOW. PRESS "SHIFT-F6" AGAIN TO RETURN  
TO THIS POINT. THEN PRESS "ENTER" TO CONTINUE

-----  
-ADINCSRCE2-

The next part of the interview is about those sources of income from [MONTH1] through the end of [MONTH 4].

Since accuracy is so important to this survey, I would like you to refer to any records that you have, such as receipts or stubs that come with checks, or bank statements, or anything else that would indicate the exact amount of money you received.

Could you please get those records now?

GIVE RESPONDENT A CHANCE TO GET RECORDS.

PRESS "ENTER" TO CONTINUE

-----  
-BM4-

The next few questions are about [HIS/HER] income from:  
[HIS/HER JOBS OR BUSINESSES]

What was the total amount of income [FIRST AND LAST NAME] received from [HIS/HER JOBS OR BUSINESSES] in the month of [MONTH4]?

(ENTER UP TO 5 SEPARATE AMOUNTS FOR THE MONTH)

(N) None/No more      (S) Same as last amount entered

\_\_\_    \_\_\_    \_\_\_    \_\_\_    \_\_\_

How much did [HE/SHE] receive from [THE JOBS AND/OR BUSINESSES] in [MONTH3]?

\_\_\_    \_\_\_    \_\_\_    \_\_\_    \_\_\_

And in [MONTH2]?

\_\_\_    \_\_\_    \_\_\_    \_\_\_    \_\_\_

And in [MONTH1]?

\_\_\_    \_\_\_    \_\_\_    \_\_\_    \_\_\_

-----  
-CBB-

It is very important that we collect information about income amounts that is as complete and accurate as possible. If I were to call back later, would you or someone else be able to provide me with this information?

- (1) Yes
- (2) No

\_\_\_\_\_

-----  
-LSTB-

(DO NOT READ TO RESPONDENT)

SEE BELOW FOR BUSINESSES OWNED BY OTHER HOUSEHOLD MEMBERS

Have you asked another person in this household about the net profit or loss from [ALL BUSINESSES]?

- (1) Yes
- (2) No

\_\_\_\_\_

-----  
-PRFTB-

For [ALL BUSINESSES], what is your best estimate of the net profit or loss, that is, the difference between gross receipts and expenses, between [MONTH1] 1st and the end of [MONTH4]?

ENTER (P) FOR PROFIT OR (L) FOR LOSS AND THEN ENTER AMOUNT  
ENTER (P),(1) IF BROKE EVEN

\_\_\_\_\_ (Profit or Loss)  
\_\_\_\_\_ (Amount)

-----  
-MOONLITE-

[INCOME IN ADDITION TO THE JOBS/BUSINESSES]

(1) Yes

(2) No

\_\_\_\_\_

-----  
-MLM4-

(JOB/BUSINESS = additional work)

What was the total amount of income [FIRST AND LAST NAME] received from this work in the month of [MONTH4]?

(ENTER UP TO 5 INDIVIDUAL AMOUNTS FOR THE MONTH)

(N) None/No more

(S) Same as last amount entered

\_\_\_\_\_

What was it in [MONTH3]?

\_\_\_\_\_

What was it in [MONTH2]?

\_\_\_\_\_

What was it in [MONTH1]?

\_\_\_\_\_

-----  
-LFREC-

\*\* DO NOT READ TO RESPONDENT \*\*

Did the respondent use any records to answer any Labor Force Earnings questions?

(1) Yes

(2) No

\_\_\_\_\_

**General Income, Part 2 - Amount Received from Incomes Reported in  
General Income, Part 1**

---

-AMTS-

Earlier I recorded that [FIRST AND LAST NAME] received  
[INCOME TYPE LISTED]

PRESS ENTER TO CONTINUE

---

-RESNSS-

What is the reason [FIRST AND LAST NAME] [ARE/IS] getting  
[INCOME TYPE LISTED]

Any other reason?

READ ALL CATEGORIES AND SELECT THE MOST APPROPRIATE  
ENTER (N) IF NO SECOND REASON

- (1) Retired?
- (2) Disabled?
- (3) Widowed or surviving child?
- (4) Spouse or dependent child?
- (5) Some other reason?

\_\_\_ 1 \_\_\_ 2

---

-JNTSSYN-

Did [FIRST AND LAST NAME] receive  
SOCIAL SECURITY  
jointly with [HIS/HER] spouse?

- (1) Yes
- (2) No

\_\_\_

---

-DIRECT-

Does [HIS/HER]  
SOCIAL SECURITY  
payment come in the mail or is it direct deposited  
into an account?

- (1) Comes in the mail
- (2) Direct deposited

\_\_\_\_\_

---

-COLSS- SHOW FLASHCARD G

Please look at this flashcard and tell me which  
color ENVELOPE [FIRST AND LAST NAME'S] check comes in.

- (1) Blue
- (2) Buff
- (4) Other

\_\_\_\_\_

---

-WHENSS-

Are [ HIS/HER] payments usually received on the  
first of the month or the third?

- (1) First
- (2) Third
- (3) Other

\_\_\_\_\_

---

-VETTYP-

What type of Veterans payments did [HE/SHE] receive?

- (1) Service-connected disability compensation
- (2) Survivor Benefits
- (3) Veteran's Pension
- (4) Other Veteran's Payments

\_\_\_\_\_

-----  
-VAQUES-

[ARE/IS] [FIRST AND LAST NAME] required to fill out an annual income questionnaire in order to receive a VA pension?

- (1) Yes
- (2) No

\_\_\_\_\_

-----  
-AFSRVDIE-

Earlier I recorded that [FIRST AND LAST NAME] received income as a widow/widower.

Did [ HIS/HER] late spouse die while in the service or from a service-related injury?

- (1) Yes
- (2) No

\_\_\_\_\_

-----  
-AFDCMTH-

[HAVE/HAS] [FIRST AND LAST NAME] received any public assistance payments so far in [MONTH5]?

- (1) Yes
- (2) No

\_\_\_\_\_

In [MONTH4]? \_\_\_\_\_

In [MONTH3]? \_\_\_\_\_

In [MONTH2]? \_\_\_\_\_

In [MONTH1]? \_\_\_\_\_

-----  
-YSTOP21-

What set of circumstances caused [FIRST AND LAST NAME]  
to stop receiving  
[INCOME TYPE LISTED]  
in [MONTH4]?

- (1) Became ineligible because of increased income
- (2) Became ineligible because of family changes  
(family member left, over age limit, etc.)
- (3) Still eligible but could not/chose not to collect
- (4) Other, specify

\_\_\_\_\_

-----  
-OTHSPS21-

What reason was that?

\_\_\_\_\_

-----  
-YBEG21- What set of circumstances led [FIRST AND LAST NAME] to apply for  
[INCOME TYPE LISTED]  
in [MONTH4]? Anything else?

MARK ALL THAT APPLY; ENTER "N" AFTER LAST RESPONSE NOTE TO FR: THE FIRST  
RESPONSE "NEEDED THE MONEY" IS NOT ACCEPTABLE AS THE ONLY RESPONSE,  
YOU MUST PROBE FOR A SECOND REASON

- (1) Needed the money
- (2) Pregnancy/birth of child
- (3) Began receiving for another dependent (e.g. grandchild)
- (4) Separated or divorced from spouse/partner
- (5) Loss of job/wages/other income (own or partner's)
- (6) Loss of other support income
- (7) Just learned about the program
- (8) Just got around to applying
- (9) Became disabled
- (10) Other, specify

\_\_\_ 1 \_\_\_ 2 \_\_\_ 3 \_\_\_ 4 \_\_\_ 5 \_\_\_ 6 \_\_\_ 7 \_\_\_ 8 \_\_\_ 9 \_\_\_ 10

-----  
-OTHSPB21-

What reason was that?

\_\_\_\_\_

-----  
-YSTOP22-

What set of circumstances caused [FIRST AND LAST NAME]  
to stop receiving  
[INCOME TYPE LISTED]  
in [MONTH3]?

- (1) Became ineligible because of increased income
  - (2) Became ineligible because of family changes  
(family member left, over age limit, etc.)
  - (3) Still eligible but could not/chose not to collect
  - (4) Other, specify
- \_\_\_\_\_

-----  
-OTHSPS22-

What reason was that?

\_\_\_\_\_

-----  
-YBEG22- What set of circumstances led [FIRST AND LAST NAME] to apply for  
[INCOME TYPE LISTED]  
in [MONTH3]? Anything else?

MARK ALL THAT APPLY; ENTER "N" AFTER LAST RESPONSE NOTE TO FR: THE FIRST  
RESPONSE "NEEDED THE MONEY" IS NOT ACCEPTABLE AS THE ONLY RESPONSE,  
YOU MUST PROBE FOR A SECOND REASON

- (1) Needed the money
- (2) Pregnancy/birth of child
- (3) Began receiving for another dependent (e.g. grandchild)
- (4) Separated or divorced from spouse/partner
- (5) Loss of job/wages/other income (own or partner's)
- (6) Loss of other support income
- (7) Just learned about the program
- (8) Just got around to applying
- (9) Became disabled
- (10) Other, specify

\_\_\_ 1 \_\_\_ 2 \_\_\_ 3 \_\_\_ 4 \_\_\_ 5 \_\_\_ 6 \_\_\_ 7 \_\_\_ 8 \_\_\_ 9 \_\_\_ 10

-----  
-OTHSPB22-

What reason was that?

\_\_\_\_\_

-----  
-YSTOP23-

What set of circumstances caused [FIRST AND LAST NAME]  
to stop receiving  
[INCOME TYPE LISTED]  
in [MONTH2]?

- (1) Became ineligible because of increased income
- (2) Became ineligible because of family changes  
(family member left, over age limit, etc.)
- (3) Still eligible but could not/chose not to collect
- (4) Other, specify

\_\_\_\_\_

-----  
-OTHSPS23-

What reason was that?

\_\_\_\_\_

-----  
-YBEG23- What set of circumstances led [FIRST AND LAST NAME] to apply for  
[INCOME TYPE LISTED]  
in [MONTH2]? Anything else?

MARK ALL THAT APPLY; ENTER "N" AFTER LAST RESPONSE NOTE TO FR: THE FIRST  
RESPONSE "NEEDED THE MONEY" IS NOT ACCEPTABLE AS THE ONLY RESPONSE,  
YOU MUST PROBE FOR A SECOND REASON

- (1) Needed the money
- (2) Pregnancy/birth of child
- (3) Began receiving for another dependent (e.g. grandchild)
- (4) Separated or divorced from spouse/partner
- (5) Loss of job/wages/other income (own or partner's)
- (6) Loss of other support income
- (7) Just learned about the program
- (8) Just got around to applying
- (9) Became disabled
- (10) Other, specify

\_\_\_ 1 \_\_\_ 2 \_\_\_ 3 \_\_\_ 4 \_\_\_ 5 \_\_\_ 6 \_\_\_ 7 \_\_\_ 8 \_\_\_ 9 \_\_\_ 10

-----  
-OTHSPB23-

What reason was that?

\_\_\_\_\_

-----  
-YBEG220- What set of circumstances led [FIRST AND LAST NAME] to apply for  
[INCOME TYPE LISTED]  
in [MONTH1]? Anything else?

MARK ALL THAT APPLY; ENTER "N" AFTER LAST RESPONSE NOTE TO FR: THE FIRST  
RESPONSE "NEEDED THE MONEY" IS NOT ACCEPTABLE AS THE ONLY RESPONSE,  
YOU MUST PROBE FOR A SECOND REASON]

- (1) Needed the money
- (2) Pregnancy/birth of child
- (3) Began receiving for another dependent (e.g. grandchild)
- (4) Separated or divorced from spouse/partner
- (5) Loss of job/wages/other income (own or partner's)
- (6) Loss of other support income
- (7) Just learned about the program
- (8) Just got around to applying
- (9) Became disabled
- (10) Other, specify

\_\_\_1 \_\_\_2 \_\_\_3 \_\_\_4 \_\_\_5 \_\_\_6 \_\_\_7 \_\_\_8 \_\_\_9 \_\_\_10

-----  
-OTHSP220-

What reason was that?

\_\_\_\_\_

-----  
-ADCAMT15- How much did [FIRST AND LAST NAME] receive from Public  
Assistance Payments not including food stamps --

ENTER (N) FOR NONE/NO MORE. ENTER (S) FOR SAME AS PREVIOUS AMOUNT.

Month 4

\_\_\_\_\_

Month 3

\_\_\_\_\_

Month 2

\_\_\_\_\_

Month 1

\_\_\_\_\_

-----  
-CHCK4-

NOTE TO FR -----  
THE AMOUNT ENTERED  
IS UNUSUALLY LARGE.

(1) BACKUP AND CORRECT  
(P) Proceed

\_\_\_\_\_

-----  
-CHCK3-

NOTE TO FR -----  
THE AMOUNT ENTERED  
IS UNUSUALLY LARGE.

(1) BACKUP AND CORRECT  
(P) Proceed

\_\_\_\_\_

-----  
-CHCK2-

NOTE TO FR -----  
THE AMOUNT ENTERED-  
IS UNUSUALLY LARGE.

(1) BACKUP AND CORRECT  
(P) Proceed

\_\_\_\_\_

-----  
-CHCK1-

NOTE TO FR -----  
THE AMOUNT ENTERED  
IS UNUSUALLY LARGE.

(1) BACKUP AND CORRECT  
(P) Proceed

\_\_\_\_\_

-----  
-AFDCAMT4-

How much did [FIRST AND LAST NAME] receive from Public  
Assistance Payments in [MONTH4]?  
ENTER (N) FOR NONE/NO MORE AFTER LAST AMOUNT

\_\_\_\_ 1  
\_\_\_\_ 2  
\_\_\_\_ 3  
\_\_\_\_ 4  
\_\_\_\_ 5

-----  
-BIGINC4-

NOTE TO FR -----

THE AMOUNT ENTERED -  
IS UNUSUALLY LARGE.

PRESS (1) TO BACK UP AND CORRECT IT IF IT IS IN ERROR OR  
(P) TO PROCEED.

(1) BACKUP AND CORRECT

(P) Proceed

\_\_\_\_\_

-----  
-CSAGCY4-

How much child support was collected by the agency in  
[HIS/HER] behalf in [MONTH4]?

(N) None

\_\_\_\_\_

-----  
-PASSAMT4-

How much pass through child support payment  
did [FIRST AND LAST NAME] receive in [MONTH4]?

(N) None

\_\_\_\_\_

-----  
-AFDCAMT3-

How much did [FIRST AND LAST NAME] receive from Public Assistance Payments in [MONTH3]?  
ENTER (N) FOR NONE/NO MORE AFTER LAST AMOUNT

- \_\_\_ 1
- \_\_\_ 2
- \_\_\_ 3
- \_\_\_ 4
- \_\_\_ 5

-----  
-BIGINC3-

NOTE TO FR -----  
THE AMOUNT ENTERED - INDEX:,  
IS UNUSUALLY LARGE.  
PRESS (1) TO BACK UP AND CORRECT IT IF IT IS IN ERROR OR  
(P) TO PROCEED.

- (1) BACKUP AND CORRECT
- (P) Proceed

\_\_\_

-----  
-CSAGCY3-

How much child support was collected by the agency in [HIS/HER] behalf in [MONTH3]?

- (N) None

\_\_\_

-----  
-PASSAMT3-

How much pass through child support payment  
did [FIRST AND LAST NAME] receive in [MONTH3]?

(N) None

\_\_\_\_\_

-----  
-AFDCAMT2-

How much did [FIRST AND LAST NAME] receive from Public  
Assistance Payments in [MONTH2]?

ENTER (N) FOR NONE/NO MORE AFTER LAST AMOUNT

\_\_\_\_ 1  
\_\_\_\_ 2  
\_\_\_\_ 3  
\_\_\_\_ 4  
\_\_\_\_ 5

-----  
-BIGINC2-

NOTE TO FR -----

THE AMOUNT ENTERED

IS UNUSUALLY LARGE.

PRESS (1) TO BACK UP AND CORRECT IT IF IT IS IN ERROR OR  
(P) TO PROCEED.

(1) BACKUP AND CORRECT

(P) Proceed

\_\_\_\_\_

-----  
-CSAGCY2-

How much child support was collected by the agency in  
[HIS/HE]R behalf in [MONTH2]?

(N) None

\_\_\_\_\_

-----  
-PASSAMT2-

How much pass through child support payment  
did [FIRST AND LAST NAME] receive in [MONTH2]?

(N) None

\_\_\_\_\_

-----  
-AFDCAMT1-

How much did [FIRST AND LAST NAME] receive from Public  
Assistance Payments in [MONTH1]?

ENTER (N) FOR NONE/NO MORE AFTER LAST AMOUNT

\_\_\_\_ 1  
\_\_\_\_ 2  
\_\_\_\_ 3  
\_\_\_\_ 4  
\_\_\_\_ 5

-----  
-BIGINC1-

NOTE TO FR -----

THE AMOUNT ENTERED -  
IS UNUSUALLY LARGE.

PRESS (1) TO BACK UP AND CORRECT IT IF IT IS IN ERROR OR  
(P) TO PROCEED.

(1) BACKUP AND CORRECT

(P) Proceed

\_\_\_\_\_

-----  
-CSAGCY1-

How much child support was collected by the agency in  
[HIS/HER] behalf in [MONTH1]?

(N) None

\_\_\_\_\_

-----  
-PASSAMT1-

How much of pass through child support payment  
did [FIRST AND LAST NAME] receive in [MONTH1]?

(N) None

\_\_\_\_\_

-----  
-AFDCCOV- Who [DID/DOES], [FIRST AND LAST NAME] Public  
Assistance payment cover?

ENTER LINE NUMBER OF PERSON COVERED

ENTER (N) FOR NO ONE/NO MORE

ENTER (A) FOR ALL

\_\_\_1 \_\_\_2 \_\_\_3 \_\_\_4 \_\_\_5 \_\_\_6 \_\_\_7 \_\_\_8 \_\_\_9 \_\_\_10

\_\_\_11 \_\_\_12 \_\_\_13 \_\_\_14 \_\_\_15 \_\_\_16 \_\_\_17 \_\_\_18 \_\_\_19 \_\_\_20

-----  
-WICMNTH-

[HAVE/HAS] [FIRST AND LAST NAME] received any WIC  
in [MONTH5]?

- (1) Yes
- (2) No

\_\_\_\_\_

In [MONTH4]? \_\_\_\_\_

In [MONTH3]? \_\_\_\_\_

In [MONTH2]? \_\_\_\_\_

In [MONTH1]? \_\_\_\_\_

-----  
-WYSTOP21-

What set of circumstances caused [FIRST AND LAST NAME]  
to stop receiving  
[INCOME TYPE LISTED]  
in [MONTH4]?

- (1) Became ineligible because of increased income
- (2) Became ineligible because of family changes  
(family member left, over age limit, etc.)
- (3) Still eligible but could not/chose not to collect
- (4) Other, specify

\_\_\_\_\_

-----  
-OTHSWS21-

What reason was that?

\_\_\_\_ 1  
\_\_\_\_ 2

-----  
-WYBEG21- What set of circumstances led [FIRST AND LAST NAME] to apply for  
[INCOME TYPE LISTED]  
in [MONTH4]? Anything else?

MARK ALL THAT APPLY; ENTER "N" AFTER LAST RESPONSE NOTE TO FR: THE FIRST  
RESPONSE "NEEDED THE MONEY" IS NOT ACCEPTABLE AS THE ONLY RESPONSE,  
YOU MUST PROBE FOR A SECOND REASON

- (1) Needed the money
- (2) Pregnancy/birth of child
- (3) Began receiving for another dependent (e.g. grandchild)
- (4) Separated or divorced from spouse/partner
- (5) Loss of job/wages/other income (own or partner's)
- (6) Loss of other support income
- (7) Just learned about the program
- (8) Just got around to applying
- (9) Became disabled
- (10) Other, specify

\_\_\_ 1 \_\_\_ 2 \_\_\_ 3 \_\_\_ 4 \_\_\_ 5 \_\_\_ 6 \_\_\_ 7 \_\_\_ 8 \_\_\_ 9 \_\_\_ 10

-----  
-OTHSWB21-

What reason was that?

\_\_\_\_\_

-----  
-WYSTOP22-

What set of circumstances caused [FIRST AND LAST NAME]  
to stop receiving  
[INCOME TYPE LISTED]  
in [MONTH3]?

- (1) Became ineligible because of increased income
- (2) Became ineligible because of family changes  
(family member left, over age limit, etc.)
- (3) Still eligible but could not/chose not to collect
- (4) Other, specify

\_\_\_\_\_

-----  
-OTHSWS22-

What reason was that?

\_\_\_\_\_

-----  
-WYBEG22- What set of circumstances led [FIRST AND LAST NAME] to apply for  
[INCOME TYPE LISTED]  
in [MONTH3]? Anything else?

MARK ALL THAT APPLY; ENTER "N" AFTER LAST RESPONSE NOTE TO FR: THE FIRST  
RESPONSE "NEEDED THE MONEY" IS NOT ACCEPTABLE AS THE ONLY RESPONSE,  
YOU MUST PROBE FOR A SECOND REASON

- (1) Needed the money
- (2) Pregnancy/birth of child
- (3) Began receiving for another dependent (e.g. grandchild)
- (4) Separated or divorced from spouse/partner
- (5) Loss of job/wages/other income (own or partner's)
- (6) Loss of other support income
- (7) Just learned about the program
- (8) Just got around to applying
- (9) Became disabled
- (10) Other, specify

\_\_\_ 1 \_\_\_ 2 \_\_\_ 3 \_\_\_ 4 \_\_\_ 5 \_\_\_ 6 \_\_\_ 7 \_\_\_ 8 \_\_\_ 9 \_\_\_ 10

-----  
-OTHSWB22-

What reason was that?

---

-----  
-WYSTOP23-

What set of circumstances caused [FIRST AND LAST NAME]  
to stop receiving  
[INCOME TYPE LISTED]  
in [MONTH2]?

- (1) Became ineligible because of increased income
  - (2) Became ineligible because of family changes  
(family member left, over age limit, etc.)
  - (3) Still eligible but could not/chose not to collect
  - (4) Other, specify
- 

-----  
-OTHSWS23-

What reason was that?

---

-----  
-WYBEG23- What set of circumstances led [FIRST AND LAST NAME] to apply for  
[INCOME TYPE LISTED]  
in [MONTH2]? Anything else?

MARK ALL THAT APPLY; ENTER "N" AFTER LAST RESPONSE NOTE TO FR: THE FIRST  
RESPONSE "NEEDED THE MONEY" IS NOT ACCEPTABLE AS THE ONLY RESPONSE,  
YOU MUST PROBE FOR A SECOND REASON

- (1) Needed the money
- (2) Pregnancy/birth of child
- (3) Began receiving for another dependent (e.g. grandchild)
- (4) Separated or divorced from spouse/partner
- (5) Loss of job/wages/other income (own or partner's)
- (6) Loss of other support income
- (7) Just learned about the program
- (8) Just got around to applying
- (9) Became disabled
- (10) Other, specify

\_\_\_ 1 \_\_\_ 2 \_\_\_ 3 \_\_\_ 4 \_\_\_ 5 \_\_\_ 6 \_\_\_ 7 \_\_\_ 8 \_\_\_ 9 \_\_\_ 10

-----  
-OTHSWB23-

What reason was that?

\_\_\_\_\_

-----  
-WYBEG220- What set of circumstances led [FIRST AND LAST NAME] to apply for  
[INCOME TYPE LISTED]  
in [MONTH1]? Anything else?

MARK ALL THAT APPLY; ENTER "N" AFTER LAST RESPONSE NOTE TO FR: THE FIRST  
RESPONSE "NEEDED THE MONEY" IS NOT ACCEPTABLE AS THE ONLY RESPONSE,  
YOU MUST PROBE FOR A SECOND REASON

- (1) Needed the money
- (2) Pregnancy/birth of child
- (3) Began receiving for another dependent (e.g. grandchild)
- (4) Separated or divorced from spouse/partner
- (5) Loss of job/wages/other income (own or partner's)
- (6) Loss of other support income
- (7) Just learned about the program
- (8) Just got around to applying
- (9) Became disabled
- (10) Other, specify

\_\_\_1 \_\_\_2 \_\_\_3 \_\_\_4 \_\_\_5 \_\_\_6 \_\_\_7 \_\_\_8 \_\_\_9 \_\_\_10

-----  
-OTSPW220-

What reason was that?

\_\_\_\_\_

-----  
-WICPER-

Who[DO/DOES] WIC cover ?

ENTER LINE NUMBER OF PERSON COVERED

ENTER (N) FOR NO ONE/NO MORE

ENTER (A) FOR ALL

\_\_\_1 \_\_\_2 \_\_\_3 \_\_\_4 \_\_\_5 \_\_\_6 \_\_\_7 \_\_\_8 \_\_\_9 \_\_\_10

\_\_\_11 \_\_\_12 \_\_\_13 \_\_\_14 \_\_\_15 \_\_\_16 \_\_\_17 \_\_\_18 \_\_\_19 \_\_\_20

-----  
-FSMTHYN-

Did [FIRST AND LAST NAME] receive Food Stamps  
in [MONTH5]?

- (1) Yes
- (2) No

\_\_\_\_\_

In [MONTH4]? \_\_\_\_\_

In [MONTH3]? \_\_\_\_\_

In [MONTH2]? \_\_\_\_\_

In [MONTH1]? \_\_\_\_\_

-----  
-FYSTOP21-

What set of circumstances caused [FIRST AND LAST NAME]  
to stop receiving  
[INCOME TYPE LISTED]  
in [MONTH4]?

- (1) Became ineligible because of increased income
- (2) Became ineligible because of family changes  
(family member left, over age limit, etc.)
- (3) Still eligible but could not/chose not to collect
- (4) Other, specify

\_\_\_\_\_

-----  
-OTHSFS21-

What reason was that?

\_\_\_\_\_

-----  
-FYBEG21- What set of circumstances led [FIRST AND LAST NAME] to apply for  
[INCOME TYPE LISTED]  
in [MONTH4]? Anything else?

MARK ALL THAT APPLY; ENTER "N" AFTER LAST RESPONSE NOTE TO FR: THE FIRST  
RESPONSE "NEEDED THE MONEY" IS NOT ACCEPTABLE AS THE ONLY RESPONSE,  
YOU MUST PROBE FOR A SECOND REASON

- (1) Needed the money
- (2) Pregnancy/birth of child
- (3) Began receiving for another dependent (e.g. grandchild)
- (4) Separated or divorced from spouse/partner
- (5) Loss of job/wages/other income (own or partner's)
- (6) Loss of other support income
- (7) Just learned about the program
- (8) Just got around to applying
- (9) Became disabled
- (10) Other, specify

\_\_\_ 1 \_\_\_ 2 \_\_\_ 3 \_\_\_ 4 \_\_\_ 5 \_\_\_ 6 \_\_\_ 7 \_\_\_ 8 \_\_\_ 9 \_\_\_ 10

-----  
-OTHSFB21-

What reason was that?

\_\_\_\_\_

-----  
-FYSTOP22-

What set of circumstances caused [FIRST AND LAST NAME]  
to stop receiving  
[INCOME TYPE LISTED]  
in [MONTH3]?

- (1) Became ineligible because of increased income
- (2) Became ineligible because of family changes  
(family member left, over age limit, etc.)
- (3) Still eligible but could not/chose not to collect
- (4) Other, specify

\_\_\_\_\_

-----  
-OTHSFS22-

What reason was that?

\_\_\_\_\_

-----  
-FYBEG22- What set of circumstances led [FIRST AND LAST NAME] to apply for  
[INCOME TYPE LISTED]  
in [MONTH3]? Anything else?

MARK ALL THAT APPLY; ENTER "N" AFTER LAST RESPONSE NOTE TO FR: THE FIRST  
RESPONSE "NEEDED THE MONEY" IS NOT ACCEPTABLE AS THE ONLY RESPONSE,  
YOU MUST PROBE FOR A SECOND REASON

- (1) Needed the money
- (2) Pregnancy/birth of child
- (3) Began receiving for another dependent (e.g. grandchild)
- (4) Separated or divorced from spouse/partner
- (5) Loss of job/wages/other income (own or partner's)
- (6) Loss of other support income
- (7) Just learned about the program
- (8) Just got around to applying
- (9) Became disabled
- (10) Other, specify

\_\_\_ 1 \_\_\_ 2 \_\_\_ 3 \_\_\_ 4 \_\_\_ 5 \_\_\_ 6 \_\_\_ 7 \_\_\_ 8 \_\_\_ 9 \_\_\_ 10

-----  
-OTHSFB22-

What reason was that?

\_\_\_\_\_

-----  
-FYSTOP23-

What set of circumstances caused [FIRST AND LAST NAME]  
to stop receiving  
[INCOME TYPE LISTED]  
in [MONTH2]?

- (1) Became ineligible because of increased income
  - (2) Became ineligible because of family changes  
(family member left, over age limit, etc.)
  - (3) Still eligible but could not/chose not to collect
  - (4) Other, specify
- \_\_\_\_\_

-----  
-OTHSFS23-

What reason was that?

\_\_\_\_\_

-----  
-FYBEG23- What set of circumstances led [FIRST NAME LAST NAME] to apply for  
[INCOME TYPE LISTED]  
in [MONTH2]? Anything else?

MARK ALL THAT APPLY; ENTER "N" AFTER LAST RESPONSE NOTE TO FR: THE FIRST  
RESPONSE "NEEDED THE MONEY" IS NOT ACCEPTABLE AS THE ONLY RESPONSE,  
YOU MUST PROBE FOR A SECOND REASON

- (1) Needed the money
- (2) Pregnancy/birth of child
- (3) Began receiving for another dependent (e.g. grandchild)
- (4) Separated or divorced from spouse/partner
- (5) Loss of job/wages/other income (own or partner's)
- (6) Loss of other support income
- (7) Just learned about the program
- (8) Just got around to applying
- (9) Became disabled
- (10) Other, specify

\_\_\_ 1 \_\_\_ 2 \_\_\_ 3 \_\_\_ 4 \_\_\_ 5 \_\_\_ 6 \_\_\_ 7 \_\_\_ 8 \_\_\_ 9 \_\_\_ 10

-----  
-OTHSFB23-

What reason was that?

---

-----  
-FYBEG220- What set of circumstances led [FIRST AND LAST NAME] to apply for  
[INCOME TYPE LISTED]  
in [MONTH1]? Anything else?

MARK ALL THAT APPLY; ENTER "N" AFTER LAST RESPONSE NOTE TO FR: THE FIRST  
RESPONSE "NEEDED THE MONEY" IS NOT ACCEPTABLE AS THE ONLY RESPONSE,  
YOU MUST PROBE FOR A SECOND REASON

- (1) Needed the money
- (2) Pregnancy/birth of child
- (3) Began receiving for another dependent (e.g. grandchild)
- (4) Separated or divorced from spouse/partner
- (5) Loss of job/wages/other income (own or partner's)
- (6) Loss of other support income
- (7) Just learned about the program
- (8) Just got around to applying
- (9) Became disabled
- (10) Other, specify

\_\_\_1 \_\_\_2 \_\_\_3 \_\_\_4 \_\_\_5 \_\_\_6 \_\_\_7 \_\_\_8 \_\_\_9 \_\_\_10

-----  
-OTSPF220-

What reason was that?

\_\_\_\_\_

-----  
-FSAMT15- What was the amount of Food Stamps [FIRST AND LAST NAME]  
received in:

ENTER (N) FOR NONE/NO MORE. ENTER (S) FOR SAME AS PREVIOUS AMOUNT

Month 4

\_\_\_\_\_

Month 3

\_\_\_\_\_

Month 2

\_\_\_\_\_

Month 1

\_\_\_\_\_

-----  
-BIGFS4-

NOTE TO FR -----

THE AMOUNT ENTERED -  
IS UNUSUALLY LARGE.

(1) BACKUP AND CORRECT

(P) Proceed

—

-----  
-BIGFS3-

NOTE TO FR -----

THE AMOUNT ENTERED -  
IS UNUSUALLY LARGE.

(1) BACKUP AND CORRECT

(P) Proceed

—

-----  
-BIGFS2-

NOTE TO FR -----  
THE AMOUNT ENTERED -  
IS UNUSUALLY LARGE.

- (1) BACKUP AND CORRECT
  - (P) Proceed
- 

-----  
-BIGFS1-

NOTE TO FR -----  
THE AMOUNT ENTERED  
IS UNUSUALLY LARGE.

- (1) BACKUP AND CORRECT
  - (P) Proceed
- 

-----  
-FSPER- Who [DID/DOES] [FIRST AND LAST NAME]

Food Stamps cover?  
ENTER LINE NUMBER OF PERSON COVERED  
ENTER (N) FOR NO ONE/NO MORE. ENTER (A) FOR ALL

\_\_\_ 1 \_\_\_ 2 \_\_\_ 3 \_\_\_ 4 \_\_\_ 5 \_\_\_ 6 \_\_\_ 7 \_\_\_ 8 \_\_\_ 9 \_\_\_ 10  
\_\_\_ 11 \_\_\_ 12 \_\_\_ 13 \_\_\_ 14 \_\_\_ 15 \_\_\_ 16 \_\_\_ 17 \_\_\_ 18 \_\_\_ 19 \_\_\_ 20

-----  
-CSMTH-

[HAVE/HAS] [FIRST AND LAST NAME] received any  
Child Support payments in  
[MONTH5]?

(1) Yes

(2) No

\_\_\_\_\_

In [MONTH4]? \_\_\_\_\_

In [MONTH3]? \_\_\_\_\_

In [MONTH2]? \_\_\_\_\_

In [MONTH1]? \_\_\_\_\_

-----  
-CSAMT15-

What was the amount of child support [FIRST AND LAST NAME] received:

ENTER (N) FOR NONE/NO MORE. ENTER (S) FOR SAME AS PREVIOUS AMOUNT.

Month 4

\_\_\_\_\_

Month 3

\_\_\_\_\_

Month 2

\_\_\_\_\_

Month 1

\_\_\_\_\_

---

-BIGCS4-

NOTE TO FR -----  
THE AMOUNT ENTERED  
IS UNUSUALLY LARGE.  
(1) BACKUP AND CORRECT  
(P) Proceed

---

---

-BIGCS3-

NOTE TO FR -----  
THE AMOUNT ENTERED  
IS UNUSUALLY LARGE.  
  
(1) BACKUP AND CORRECT  
(P) Proceed

---

---

-BIGCS2-

NOTE TO FR -----  
THE AMOUNT ENTERED -  
IS UNUSUALLY LARGE.  
  
(1) BACKUP AND CORRECT  
(P) Proceed

---

---

-BIGCS1-

NOTE TO FR -----  
THE AMOUNT ENTERED -  
IS UNUSUALLY LARGE.  
  
(1) BACKUP AND CORRECT  
(P) Proceed

---

-----  
-MNTHYN-

[HAVE/HAS] [FIRST AND LAST NAME] received any

[INCOME TYPE LISTED]

in [MONTH5]?

(1) Yes

(2) No

\_\_\_\_\_

In [MONTH4]? \_\_\_\_\_

In [MONTH3]? \_\_\_\_\_

In [MONTH2]? \_\_\_\_\_

In [MONTH1]? \_\_\_\_\_

-----  
-MYSTOP21-

What set of circumstances caused [FIRST AND LAST NAME]  
to stop receiving:

[INCOME TYPE LISTED]

in [MONTH4]?

(1) Became ineligible because of increased income

(2) Became ineligible because of family changes  
(family member left, over age limit, etc.)

(3) Still eligible but could not/chose not to collect

(4) Other, specify

\_\_\_\_\_

-----  
-OTHSMS21-

What reason was that?

\_\_\_\_\_

-----  
-MYBEG21L- What set of circumstances led [FIRST AND LAST NAME] to apply for

[INCOME TYPE LISTED]

in [MONTH4]? Anything else?

MARK ALL THAT APPLY; ENTER "N" AFTER LAST RESPONSE NOTE TO FR: THE FIRST RESPONSE "NEEDED THE MONEY" IS NOT ACCEPTABLE AS THE ONLY RESPONSE, YOU MUST PROBE FOR A SECOND REASON

- (1) Needed the money
- (2) Pregnancy/birth of child
- (3) Began receiving for another dependent (e.g. grandchild)
- (4) Separated or divorced from spouse/partner
- (5) Loss of job/wages/other income (own or partner's)
- (6) Loss of other support income
- (7) Just learned about the program
- (8) Just got around to applying
- (9) Became disabled
- (10) Other, specify

\_\_\_ 1 \_\_\_ 2 \_\_\_ 3 \_\_\_ 4 \_\_\_ 5 \_\_\_ 6 \_\_\_ 7 \_\_\_ 8 \_\_\_ 9 \_\_\_ 10

-----  
-MYBEG21S- What set of circumstances led [FIRST AND LAST NAME] to apply for  
[INCOME TYPE LISTED]

in [MONTH4]? Anything else?

MARK ALL THAT APPLY; ENTER "N" AFTER LAST RESPONSE

NOTE TO FR: THE FIRST RESPONSE "NEEDED THE MONEY" IS NOT ACCEPTABLE AS THE ONLY RESPONSE, YOU MUST PROBE FOR A SECOND REASON

- (1) Needed the money
- (2) Became disabled/blind
- (3) Over 65
- (4) Other, specify

\_\_\_ 1 \_\_\_ 2 \_\_\_ 3 \_\_\_ 4

-----  
-OTHSMB21-

What reason was that?

\_\_\_\_\_

-----  
-MYSTOP22-

What set of circumstances caused [FIRST AND LAST NAME]  
to stop receiving  
[INCOME TYPE LISTED]  
in [MONTH3]?

- (1) Became ineligible because of increased income
  - (2) Became ineligible because of family changes  
(family member left, over age limit, etc.)
  - (3) Still eligible but could not/chose not to collect
  - (4) Other, specify
- \_\_\_\_\_

-----  
-OTHSMS22-

What reason was that?

\_\_\_\_\_

-----  
-MYBEG22L- What set of circumstances led [FIRST AND LAST NAME] to apply for  
[INCOME TYPE LISTED]  
in [MONTH3]? Anything else?

MARK ALL THAT APPLY; ENTER "N" AFTER LAST RESPONSE NOTE TO FR: THE FIRST  
RESPONSE "NEEDED THE MONEY" IS NOT ACCEPTABLE AS THE ONLY RESPONSE,  
YOU MUST PROBE FOR A SECOND REASON

- (1) Needed the money
- (2) Pregnancy/birth of child
- (3) Began receiving for another dependent (e.g. grandchild)
- (4) Separated or divorced from spouse/partner
- (5) Loss of job/wages/other income (own or partner's)
- (6) Loss of other support income
- (7) Just learned about the program
- (8) Just got around to applying
- (9) Became disabled
- (10) Other, specify

\_\_\_ 1 \_\_\_ 2 \_\_\_ 3 \_\_\_ 4 \_\_\_ 5 \_\_\_ 6 \_\_\_ 7 \_\_\_ 8 \_\_\_ 9 \_\_\_ 10

-----  
-MYBEG22S- What set of circumstances led [FIRST AND LAST NAME] to apply for  
[INCOME TYPE LISTED]  
in [MONTH3]? Anything else?

MARK ALL THAT APPLY; ENTER "N" AFTER LAST RESPONSE

NOTE TO FR: THE FIRST RESPONSE "NEEDED THE MONEY" IS NOT ACCEPTABLE  
AS THE ONLY RESPONSE, YOU MUST PROBE FOR A SECOND REASON

- (1) Needed the money
- (2) Became disabled/blind
- (3) Over 65
- (4) Other, specify

\_\_\_ 1 \_\_\_ 2 \_\_\_ 3 \_\_\_ 4

-----  
-OTHSMB22-

What reason was that?

-----  
-0

-----  
-MYSTOP23-

What set of circumstances caused [FIRST AND LAST NAME]  
to stop receiving  
[INCOME TYPE LISTED]  
in [MONTH2]?

- (1) Became ineligible because of increased income
  - (2) Became ineligible because of family changes  
(family member left, over age limit, etc.)
  - (3) Still eligible but could not/chose not to collect
  - (4) Other, specify
- \_\_\_\_\_

-----  
-OTHSMS23-

What reason was that?

\_\_\_\_\_

-----  
-MYBEG23L- What set of circumstances led [FIRST AND LAST NAME] to apply for

[INCOME TYPE LISTED]

in [MONTH2]? Anything else?

MARK ALL THAT APPLY; ENTER "N" AFTER LAST RESPONSE NOTE TO FR: THE FIRST RESPONSE "NEEDED THE MONEY" IS NOT ACCEPTABLE AS THE ONLY RESPONSE, YOU MUST PROBE FOR A SECOND REASON

- (1) Needed the money
- (2) Pregnancy/birth of child
- (3) Began receiving for another dependent (e.g. grandchild)
- (4) Separated or divorced from spouse/partner
- (5) Loss of job/wages/other income (own or partner's)
- (6) Loss of other support income
- (7) Just learned about the program
- (8) Just got around to applying
- (9) Became disabled
- (10) Other, specify

\_\_\_ 1 \_\_\_ 2 \_\_\_ 3 \_\_\_ 4 \_\_\_ 5 \_\_\_ 6 \_\_\_ 7 \_\_\_ 8 \_\_\_ 9 \_\_\_ 10

-----  
-MYBEG23S- What set of circumstances led [FIRST AND LAST NAME] to apply for

[INCOME TYPE LISTED]

in [MONTH2]? Anything else?

MARK ALL THAT APPLY; ENTER "N" AFTER LAST RESPONSE NOTE TO FR: THE FIRST RESPONSE "NEEDED THE MONEY" IS NOT ACCEPTABLE AS THE ONLY RESPONSE, YOU MUST PROBE FOR A SECOND REASON

- (1) Needed the money
- (2) Became disabled/blind
- (3) Over 65
- (4) Other, specify

\_\_\_ 1 \_\_\_ 2 \_\_\_ 3 \_\_\_ 4

-----  
-OTHSMB23-

What reason was that?

\_\_\_\_\_

-----  
-MYBEG220L- What set of circumstances led [FIRST AND LAST NAME] to apply for

[INCOME TYPE LISTED]

in [MONTH1]? Anything else?

MARK ALL THAT APPLY; ENTER "N" AFTER LAST RESPONSE NOTE TO FR: THE FIRST RESPONSE "NEEDED THE MONEY" IS NOT ACCEPTABLE AS THE ONLY RESPONSE, YOU MUST PROBE FOR A SECOND REASON

- (1) Needed the money
- (2) Pregnancy/birth of child
- (3) Began receiving for another dependent (e.g. grandchild)
- (4) Separated or divorced from spouse/partner
- (5) Loss of job/wages/other income (own or partner's)
- (6) Loss of other support income
- (7) Just learned about the program
- (8) Just got around to applying
- (9) Became disabled
- (10) Other, specify

\_\_\_1 \_\_\_2 \_\_\_3 \_\_\_4 \_\_\_5 \_\_\_6 \_\_\_7 \_\_\_8 \_\_\_9 \_\_\_10

-----  
-MYBEG220S- What set of circumstances led [FIRST AND LAST NAME] to apply for

[INCOME TYPE LISTED]

in [MONTH1]? Anything else?

MARK ALL THAT APPLY; ENTER "N" AFTER LAST RESPONSE

NOTE TO FR: THE FIRST RESPONSE "NEEDED THE MONEY" IS NOT ACCEPTABLE  
AS THE ONLY RESPONSE, YOU MUST PROBE FOR A SECOND REASON

- (1) Needed the money
- (2) Became disabled/blind
- (3) Over 65
- (4) Other, specify

\_\_\_1 \_\_\_2 \_\_\_3 \_\_\_4

-----  
-OTSPM220-

What reason was that?

\_\_\_\_\_

-----  
-MNTHAMT15- For each payment, please report the total amount

How much [INCOME TYPE LISTED]  
did [FIRST AND LAST NAME] receive?

ENTER (N) FOR NONE/NO MORE. ENTER (S) FOR SAME AS PREVIOUS AMOUNT.

Month 4

\_\_\_\_\_

Month 3

\_\_\_\_\_

Month 2

\_\_\_\_\_

Month 1

\_\_\_\_\_

-----  
-BIGAMT4-

NOTE TO FR -----  
THE AMOUNT ENTERED,  
IS UNUSUALLY LARGE.

(1) BACKUP AND CORRECT  
(P) Proceed

\_\_\_\_\_

-----  
-BIGAMT3-

NOTE TO FR -----  
THE AMOUNT ENTERED -  
IS UNUSUALLY LARGE.

(1) BACKUP AND CORRECT  
(P) Proceed

\_\_\_\_\_

-----  
-BIGAMT2-

NOTE TO FR -----  
THE AMOUNT ENTERED -  
IS UNUSUALLY LARGE.

- (1) BACKUP AND CORRECT
  - (P) Proceed
- \_\_\_\_\_

-----  
-BIGAMT1-

NOTE TO FR -----  
THE AMOUNT ENTERED -  
IS UNUSUALLY LARGE.

- (1) BACKUP AND CORRECT
  - (P) Proceed
- \_\_\_\_\_

-----  
-ROLLOVR1-

Did [FIRST AND LAST NAME] re-invest or "roll over" any of the  
money into an IRA or some other kind of retirement plan?

- (1) Yes
  - (2) No
- \_\_\_\_\_

-----  
-ROLLOVR2-

[DO/DOES] [FIRST AND LAST NAME] plan to re-invest or  
"roll over" any of the money?

- (1) Yes
  - (2) No
- \_\_\_\_\_

-----  
-ROLLAMT-

How much [DO/DOES FIRST AND LAST NAME] "roll over" into an other RETIREMENT account?

ENTER (A) FOR ALL

\_\_\_\_\_

-----  
-TMCOV- Who did these [INCOME TYPE LISTED] payments cover?

ENTER LINE NUMBER OF PERSON COVERED

ENTER (N) FOR NO ONE/NO MORE.

ENTER (A) FOR ALL

\_\_\_\_1 \_\_\_\_2 \_\_\_\_3 \_\_\_\_4 \_\_\_\_5 \_\_\_\_6 \_\_\_\_7 \_\_\_\_8 \_\_\_\_9 \_\_\_\_10

\_\_\_\_11 \_\_\_\_12 \_\_\_\_13 \_\_\_\_14 \_\_\_\_15 \_\_\_\_16 \_\_\_\_17 \_\_\_\_18 \_\_\_\_19 \_\_\_\_20

-----  
-KDMTHYN-

Were any [INCOME TYPE LISTED] payments received for [FIRST AND LAST NAME] children in [MONTH5]?

(1) Yes

(2) No

\_\_\_\_5  
In [MONTH4]? \_\_\_\_4

In [MONTH3]? \_\_\_\_3

In [MONTH2]? \_\_\_\_2

In [MONTH1]? \_\_\_\_1

-----  
-KIDAMT15- For each payment, please report the total amount

How much [INCOME TYPE LISTED]  
was received:

ENTER (N) FOR NONE/NO MORE. ENTER (S) FOR SAME AS PREVIOUS AMOUNT.[n]

Month 4

\_\_\_\_\_

Month 3

\_\_\_\_\_

Month 2

\_\_\_\_\_

Month 1

\_\_\_\_\_

-----  
-BIGKAMT4-

NOTE TO FR -----  
THE AMOUNT ENTERED  
IS UNUSUALLY LARGE.  
(P) TO PROCEED.

(1) BACKUP AND CORRECT  
(P) Proceed

\_\_\_\_\_

-----  
-BIGKAMT3-

NOTE TO FR -----  
THE AMOUNT ENTERED  
IS UNUSUALLY LARGE.

(1) BACKUP AND CORRECT  
(P) Proceed

\_\_\_\_\_

-----  
-BIGKAMT2-

NOTE TO FR -----  
THE AMOUNT ENTERED,  
IS UNUSUALLY LARGE.

(1) BACKUP AND CORRECT  
(P) Proceed

\_\_\_\_\_

-----  
-BIGKAMT1-

NOTE TO FR -----  
THE AMOUNT ENTERED  
IS UNUSUALLY LARGE.

(1) BACKUP AND CORRECT  
(P) Proceed

\_\_\_\_\_

-----  
-SSKIDCOV- Who did these [INCOME TYPE LISTED]

payments cover?  
ENTER LINE NUMBER OF PERSON COVERED  
ENTER (N) FOR NO ONE/NO MORE  
ENTER (A) FOR ALL

\_\_\_ 1 \_\_\_ 2 \_\_\_ 3 \_\_\_ 4 \_\_\_ 5 \_\_\_ 6 \_\_\_ 7 \_\_\_ 8 \_\_\_ 9 \_\_\_ 10

\_\_\_ 11 \_\_\_ 12 \_\_\_ 13 \_\_\_ 14 \_\_\_ 15 \_\_\_ 16 \_\_\_ 17 \_\_\_ 18 \_\_\_ 19 \_\_\_ 20

-----  
-GINCRECUSE-

\*\* DO NOT READ TO RESPONDENT \*\*

Did respondent use any records when reporting  
the amount of income received from:  
[INCOME TYPE LISTED]

- (1) Yes
- (2) No

\_\_\_\_\_

**Assets, Part 2 - Income Received from Assets Owned**

-----  
-ASSTINTRO1-

Now I am going to ask about any interest earned  
from assets from [MONTH1] 1st to the end of [MONTH4].

[EXCLUDE ANY ASSETS THAT YOU HOLD AS PART OF YOUR IRA/KEOGH/401K/THRIFT  
SAVINGS RETIREMENT PLAN]

PRESS "ENTER" TO CONTINUE

\_\_\_\_\_

-----  
-JT-

Did you own your [ASSET TYPE REPORTED]  
jointly with your spouse?

(1) Yes

(2) No

\_\_\_\_\_

-----  
-JTINT- (REFERENCE PERIOD = [MONTH1] 1ST TO THE END OF [MONTH 4])

What is the total amount of interest earned on these jointly held [ASSET TYPE REPORTED]?

ENTER (A) FOR ALTERNATIVE ANNUAL REPORTING

ENTER (N) FOR NONE/NO MORE

-----.--      -----.--      -----.--  
-----.--      -----.--      -----.--  
-----.--      -----.--      -----.--  
-----.--      -----.--      -----.--

-----  
-AJTINT-

ENTER THE INTEREST AMOUNT EARNED PER YEAR [ASSET TYPE REPORTED]

-----.--

-----  
-JTAMT-

What is the average amount that you and your spouse had  
in these jointly held [ASSET TYPE REPORTED]?

-----.--

-----  
-JCAT1B- FR NOTE: ASSET IS [ASSET TYPE REPORTED]

Is it:

- (1) Less than \$500
- (2) \$500 to \$1,000
- (3) \$1,001 to \$5,000
- (4) More than \$5,000

—

-----  
-JCAT2B- FR NOTE: ASSET IS: [ASSET TYPE REPORTED]

Is it:

- (1) Less than \$ 1,000
- (2) \$1,000 to \$ 5,000
- (3) \$5,001 to \$10,000
- (4) More than \$10,000

—

-----  
-OAST-

Besides any [ASSET TYPE REPORTED]

owned jointly with your spouse, did they have any in their own name?

- (1) Yes
- (2) No

—

-----  
-OINT-

(REFERENCE PERIOD = [MONTH 1] 1ST TO THE END OF [MONTH 4])

What is the total amount of interest you earned

on your [ASSET TYPE REPORTED]?

ENTER (A) FOR ALTERNATIVE ANNUAL REPORTING

ENTER (N) FOR NONE/NO MORE

-----  
-----  
-----  
-----  
-----

-----  
-AOINT-

ENTER THE INTEREST AMOUNT EARNED PER YEAR

-----

-----  
-OAMT-

What is the average amount that you had in these  
[ASSET TYPE REPORTED]?

-----

-----  
-OCAT1B- FR NOTE: ASSET IS :[ASSET TYPE REPORTED]

Is it:

- (1) Less than \$500
- (2) \$500 to \$1,000
- (3) \$1,001 to \$5,000
- (4) More than \$5,000

-----

-----  
-OCAT2B- FR NOTE: ASSET IS: [ASSET TYPE REPORTED]

Is it:

- (1) Less than \$1000
- (2) \$1,000 to \$5,000
- (3) \$5,001 to \$10,000
- (4) More than \$10,000

-----

-----  
-CBINT-

If I were to call back later would you be able to  
provide me with the INTEREST amount earned from:

[LIST OF ASSET TYPES WITH NO INTEREST REPORT]

- (1) Yes
- (2) No

-----

-----  
-ANYCHK-

(REFERENCE PERIOD = [MONTH 1] 1ST TO THE END OF [MONTH 4])

Earlier you told me you owned... [ASSET TYPE REPORTED].

Did you receive any dividend checks?

[INCLUDE CHECKS MADE OUT JOINTLY TO YOU AND YOUR SPOUSE]

(1) Yes

(2) No

\_\_\_\_\_

-----  
-JTDIV-

(REFERENCE PERIOD = [MONTH 1] 1ST TO THE END OF [MONTH 4])

How much was received in dividend checks made out  
jointly to you and spouse?

ENTER (A) FOR ALTERNATIVE ANNUAL REPORTING

ENTER (N) FOR NONE/NO MORE

-----  
-----  
-----

-----  
-AJTDIV-

ENTER THE DIVIDEND AMOUNT EARNED PER YEAR

-----

-----  
-ODIV-

(REFERENCE PERIOD = [Month 1] 1ST TO THE END OF [Month 4])

How much did you receive in dividend checks  
in your name only?

ENTER (A) FOR ALTERNATIVE ANNUAL REPORTING  
ENTER (N) FOR NONE/NO MORE

-----	-----	-----
-----	-----	-----
-----	-----	-----
-----	-----	-----

-----  
-AODIV-

ENTER THE DIVIDEND AMOUNT EARNED PER YEAR

-----

-----  
-OTHDIV-

Did you earn any dividends that were  
credited against a margin account or automatically  
reinvested?

(1) Yes

(2) No

\_\_\_\_\_

-----  
-JAMTDV-

(REFERENCE PERIOD = [Month 1] 1ST TO THE END OF [Month 4])

How much of these kinds of dividends did you  
earn jointly with your spouse ?

ENTER (A) FOR ALTERNATIVE ANNUAL REPORTING  
ENTER (N) FOR NONE/NO MORE

-----	-----	-----
-----	-----	-----
-----	-----	-----
-----	-----	-----

-----  
-AJAMTDV-

ENTER THE DIVIDEND AMOUNT EARNED PER YEAR

-----

-----  
-OAMTDV-

(REFERENCE PERIOD = [Month 1] 1ST TO THE END OF [Month 4])

How much of these kinds of dividends did you  
earn in your name only?

ENTER (A) FOR ALTERNATIVE ANNUAL REPORTING  
ENTER (N) FOR NONE/NO MORE

-----	-----	-----
-----	-----	-----
-----	-----	-----
-----	-----	-----

-----  
-AOAMTDV-

ENTER THE DIVIDEND AMOUNT EARNED PER YEAR

-----

-----  
-CBDIV-

If I were to call back later would you be able  
to provide me with the DIVIDEND amount earned from

[ASSET TYPE REPORTED]

(1) Yes

(2) No

\_\_\_\_\_

-----  
-JNTRNT-

(REFERENCE PERIOD = [Month 1] 1ST TO THE END OF [Month 4])

Earlier you told me that you owned some rental property.  
Did you receive any rental income from property  
owned jointly by you and your spouse ?

(1) Yes

(2) No

\_\_\_\_\_

-----  
-JARNT-

(REFERENCE PERIOD = [Month 1] 1ST TO THE END OF [Month 4])

How much was received in gross rent from this property?

ENTER (N) FOR NONE/NO MORE

-----

-----

-----

-----

-----  
-JACLR-

(REFERENCE PERIOD = [Month 1] 1ST TO THE END OF [Month 4])

What was your net income or loss after expenses?

(ENTER LOSS AS A NEGATIVE AMOUNT)

ENTER (N) FOR NONE/NO MORE

-----  
-----  
-----  
-----

-----  
-OWNRNT-

(REFERENCE PERIOD = [Month 1] 1ST TO THE END OF [Month 4])

Did you receive rental income from property  
owned entirely in your own name?

(1) Yes

(2) No

—

-----  
-OARNT-

(REFERENCE PERIOD = [Month 1] 1ST TO THE END OF [Month 4])

How much was received in gross rent from all properties?

ENTER (N) FOR NONE/NO MORE

-----  
-----  
-----  
-----

-----  
-OACLR-

(REFERENCE PERIOD = [Month 1] 1ST TO THE END OF [Month 4])

What was your net income or loss after expenses?  
(ENTER LOSS AS A NEGATIVE AMOUNT)

ENTER (N) FOR NONE/NO MORE

-----  
-----  
-----  
-----

-----  
-JRNT2-

(REFERENCE PERIOD = [Month 1] 1ST TO THE END OF [Month 4])

Did you receive any rental income from property  
owned jointly with others [NOT INCLUDING PROPERTY OWNED ENTIRELY BY YOU  
AND YOUR SPOUSE]?

- (1) Yes
- (2) No

\_\_\_\_\_

-----  
-JACLR2-

(REFERENCE PERIOD = [Month 1] 1ST TO THE END OF [Month 4])

What was your share of the net income  
or loss after expenses on this property?  
(ENTER LOSS AS A NEGATIVE AMOUNT)

ENTER (N) FOR NONE/NO MORE

-----  
-----  
-----  
-----

-----  
-MRTJNT-

(REFERENCE PERIOD = [Month 1] 1ST TO THE END OF [Month 4])

Earlier you said you held a mortgage.

Do you own this jointly with your spouse?

(1) Yes

(2) No

—

-----  
-MIJNT-

(REFERENCE PERIOD = [Month 1] 1ST TO THE END OF [Month 4])

How much interest was paid to you and your spouse by the borrower?

ENTER (N) FOR NONE/NO MORE

-----

-----

-----

-----

-----  
-MRTOWN-

[BESIDES THESE JOINTLY HELD MORTGAGES,]

did you hold any mortgages in your own name?

(1) Yes

(2) No

—

-----  
-MIOWN-

(REFERENCE PERIOD = [Month 1] 1ST TO THE END OF [Month 4])

How much interest was paid to you by the borrower?

ENTER (N) FOR NONE/NO MORE

-----  
-----  
-----  
-----

-----  
-RNDUP1-

(REFERENCE PERIOD = [Month 1] 1ST TO THE END OF [Month 4])

Earlier you said you had income from royalties.  
How much did you receive from these royalties?  
If income is shared, count only your share.

ENTER (N) FOR NONE/NO MORE

-----  
-----  
-----  
-----

-----  
-RNDUP2-

(REFERENCE PERIOD = [Month 1] 1ST TO THE END OF [Month 4])

Earlier you said that you had investment(s):

[NAMES OF BUSINESSES RESPONDENT]

HAS INVESTED IN, WITHOUT BEING ACTIVELY INVOLVED IN  
MANAGEMENT]

[NAMES OF "OTHER FINANCIAL INVESTMENTS" MENTIONED EARLIER]

How much did you receive from these investments?

If income shared, count only your share.

(ENTER LOSS AS A NEGATIVE AMOUNT)

ENTER (N) FOR NONE/NO MORE

-----

-----

-----

-----

-----  
-ASTRECUSE-

\*\* DO NOT READ TO RESPONDENT \*\*

Did respondent use any records  
to answer any Asset questions?

(1) Yes

(2) No

—

## Health Insurance

---

-HLTHINT-

Now I'm going to ask you about health insurance.

**PRESS "ENTER" TO CONTINUE**

---

-MCARE-

**(SHOW FLASHCARD H)**

At any time between [FIRST MONTH OF REFERENCE PERIOD] 1st and today  
[WAS/WERE] [NAME OF PERSON/YOU] covered by Medicare?

- (1) Yes
  - (2) No
- 

-CARETHEN-

In which months [WAS/WERE] [NAME OF PERSON/YOU]  
covered by Medicare?

- (1) Yes
- (2) No

- In this month?
  - In [FOURTH MONTH OF REFERENCE PERIOD]?
  - In [THIRD MONTH OF REFERENCE PERIOD]?
  - In [SECOND MONTH OF REFERENCE PERIOD]?
  - In [FIRST MONTH OF REFERENCE PERIOD]?
- 

-MCNUMB-

May I see [YOUR/HIS/HER] Medicare card to record the  
claim number and type of coverage?

**FLASHCARD H PROVIDES EXAMPLES OF MEDICARE CARDS  
WHICH IS TO BE SHOWN TO THE RESPONDENT.**

- (N) Card Not Available
- (A) Railroad Retirement Card (**FR: DO NOT RECORD NUMBER**)

---

-MCBACK-

If I were to call later would you be able to provide me with [YOUR/HIS/HER] Medicare number?

- (1) Yes
- (2) No

---

-CAIDNOW-

[Last time I recorded that [NAME OF PERSON/YOU] [WAS/WERE] covered by [Medicaid/OTHER NAME FOR MEDICAID.]]

At any time between [FIRST MONTH OF REFERENCE PERIOD] 1st and the end of [FOURTH MONTH OF REFERENCE PERIOD] [WAS/WERE] [NAME OF PERSON/YOU] covered by Medicaid [which you may also know as OTHER NAME FOR MEDICAID]?

- (1) Yes
- (2) No

---

-CAIDOTH-

Last time I recorded that [NAME OF PERSON/YOU] [WAS/WERE] covered by a public assistance medical program.

At any time between [FIRST MONTH OF REFERENCE PERIOD] 1st and the end of [FOURTH MONTH OF REFERENCE PERIOD] [WAS/WERE] [NAME OF PERSON/YOU] covered by any other public assistance program that pays for medical care?

- (1) Yes
- (2) No

---

-CAIDNM-

May I see [YOUR/HIS/HER] Medicaid [/OTHER NAME FOR MEDICAID] card to verify the name of the medical program?

**NAMES OF CHILDREN COVERED MAY BE LISTED ON THE CARD OF THE PRIMARY RECIPIENT.**

(N) Card Not Available

(1) Verified to be a Medicaid[/OTHER NAME FOR MEDICAID] card.

---

-KIDCOV-

How about [YOUR/HIS/HER] [child/children] [Were/Was] **\*\*\*READ NAME(S) LISTED BELOW\*\*\*** covered by Medicaid[/OTHER NAME FOR MEDICAID] or some other public assistance medical program at any time between [FIRST MONTH OF REFERENCE PERIOD] 1st and today?

(1) Yes      (2) No

---

-CAIDKIDS-

**PARENT IS [FIRST AND LAST NAME OF PERSON]**

Which of [YOUR/HIS/HER] children [WAS/WERE] covered by Medicaid[/OTHER NAME FOR MEDICAID]?

**ENTER "N" FOR NO MORE**

\_\_\_\_\_  
\_\_\_\_\_

---

-CDMNTH-

In which months [WAS/WERE] [NAME OF PERSON/YOU/YOUR] [and YOUR/HIS/HER]  
[covered/child covered/children covered]--

**READ EACH ANSWER CATEGORY**

- (1) Yes
- (2) No

- \_\_\_ In [MONTH OF INTERVIEW]?
- \_\_\_ In [FOURTH MONTH OF REFERENCE PERIOD]?
- \_\_\_ In [THIRD MONTH OF REFERENCE PERIOD]?
- \_\_\_ In [SECOND MONTH OF REFERENCE PERIOD]?
- \_\_\_ In [FIRST MONTH OF REFERENCE PERIOD]?

---

-HIVER-

Earlier I recorded that for some, or all, of the time from [FIRST MONTH OF REFERENCE PERIOD]  
1st through today [NAME OF PERSON/YOU] [WAS/WERE] covered by a health insurance plan held  
in the name of [FIRST AND LAST NAME OF PERSON]. Is that correct?

- (1) Yes
- (2) No

---

-H4MNTH-

[Last time I recorded that [NAME OF PERSON/YOU] [WAS/WERE] [covered by health insurance/covered by health insurance held in the name of/NOT covered by health insurance/covered by Medicare.]]

[Other than Medicaid/OTHER NAME FOR MEDICAID/Other than Medicare we just talked about/Other than the medical assistance program] [and Medicare we just talked about/we just talked about/and Medicare/we just talked about and Medicare] [ARE/IS] [YOU/NAME OF PERSON] covered by [any other] health insurance--**READ EACH ANSWER CATEGORY**

(1) Yes (2) No (N) NONE OF THESE MONTHS

In this month?

[WAS/WERE] [YOU/HE/SHE] covered in [FOURTH MONTH OF REFERENCE PERIOD]?

In [THIRD MONTH OF REFERENCE PERIOD]?

In [SECOND MONTH OF REFERENCE PERIOD]?

In [FIRST MONTH OF REFERENCE PERIOD]?

---

-CBHINS-

If I were to call back later would it be possible for me to get this information?

(1) Yes

(2) No

---

-HIOWN-

During any time from [FIRST MONTH OF REFERENCE PERIOD] 1st through today, did [NAME OF PERSON/YOU] also have health insurance in [YOUR/HIS/HER] own name?

(1) Yes

(2) No

---

-HIOWNER-

[IS/WAS] [YOUR/HIS/HER] health insurance coverage in [YOUR/HIS/HER] own name or [ARE/WERE/WAS] [YOU/HE/SHE] covered as a family member on someone else's plan?

- (1) Plan in own name
- (2) Covered by someone else's plan
- (3) Both

---

-HIHOLDR-

Who had the health insurance plan that covered [NAME OF PERSON/YOU]?

**ENTER THE LINE NUMBER OF THE PERSON**

- (N) No one currently living here

---

-HEMPLY-

[Let's talk about the plan in [YOUR/HIS/HER/that person's] [name/own name.]  
Was the health insurance obtained through--

**READ ANSWER CATEGORIES**

- (1) [YOUR/HIS/HER/that person's] current employer or work
- (2) [YOUR/HIS/HER/that person's] former employer
- (3) [YOUR/HIS/HER/that person's] union
- (4) CHAMPUS
- (5) CHAMPVA
- (6) Or the Military/VA health care
- (7) Privately purchased
- (8) Or in some other way

---

-HICOST-

[DOES/DID] [that person's/YOUR/HIS/HER] [current employer/former employer/union] pay all, part, or none of the premium of the plan?

- (1) All
- (2) Part
- (3) None

---

-HIPERS-

Other than [NAME OF PERSON/YOU], who else was covered by this plan?

**(ENTER LINE NUMBERS OF PERSONS COVERED)**  
**ENTER "N" AFTER LAST LINE NUMBER IS ENTERED.**

- (A) All household members
- (N) No one in the household/No more

\_\_\_ \_\_\_ \_\_\_ \_\_\_ \_\_\_ \_\_\_ \_\_\_ \_\_\_  
\_\_\_ \_\_\_ \_\_\_ \_\_\_ \_\_\_ \_\_\_ \_\_\_ \_\_\_

---

-HIOTHR-

During the period from [FIRST MONTH OF REFERENCE PERIOD] 1st through the end of [LAST MONTH OF REFERENCE PERIOD], did this plan also cover anyone who did NOT live in this household?

- (1) Yes
- (2) No

---

-HIWHO-

Who, OUTSIDE this household, did the plan cover?

**ENTER "1" FOR EACH YES THAT APPLIES.**  
**ENTER "2" FOR EACH NO THAT APPLIES.**

- \_\_\_ Spouse/Partner
- \_\_\_ Children 18 years of age or older
- \_\_\_ Children under 18 years old
- \_\_\_ Others

---

-H1KDCOV-

Was [FIRST AND LAST NAME OF PERSON] covered by a health insurance plan [other than Medicaid] at any time between [FIRST MONTH OF REFERENCE PERIOD] 1st and today?

- (1) Yes
- (2) No

---

-H2KDCOV-

Which children if any were covered by a health insurance plan [other than Medicaid] at anytime between [FIRST MONTH OF REFERENCE PERIOD] 1st and today?

**READ LIST OF CHILDREN'S NAMES DISPLAYED  
ENTER APPROPRIATE LINE NUMBER OF EACH CHILD COVERED.  
ENTER "N" FOR NONE OF THESE CHILDREN/NO MORE.**

\_\_\_\_ \_  
\_\_\_\_ \_

---

-HI1OUT-

Was [NAME OF PERSON] covered by the health insurance plan of someone who does NOT currently live in the household?

- (1) Yes
- (2) No

---

-HI2OUT-

Which children if any were covered by the health insurance plan of someone who does NOT currently live in the household?

**READ LIST OF CHILDREN'S NAMES DISPLAYED  
ENTER APPROPRIATE LINE NUMBER OF EACH CHILD COVERED BY  
SOMEONE OUTSIDE. ENTER "N" FOR NONE OF THESE CHILDREN/NO MORE.**

\_\_\_\_ \_

**Education**

---

**-ENROLL-**

Last time, I recorded that [FIRST AND LAST NAME] was enrolled during the period from [PREVIOUS FIRST MONTH OF REFERENCE PERIOD] to [PREVIOUS LAST MONTH OF REFERENCE PERIOD]. Was [FIRST AND LAST NAME] enrolled in school, either full-time or part-time, during any of the months from [FIRST MONTH OF REFERENCE PERIOD] to the end of [LAST MONTH OF REFERENCE PERIOD]?

- (1) Yes
- (2) No

READ IF NECESSARY: Include any regular school, such as elementary, high school, or college, or any vocational, technical, or business school beyond high school.

—

---

**-FULLPART-**

Was [FIRST AND LAST NAME] enrolled full-time or part-time?

- (1) Full-time
- (2) Part-time

—

---

**-NEWENRL-**

Was [FIRST AND LAST NAME] enrolled in school, either full-time or part-time, during any of the months [FIRST MONTH OF REFERENCE PERIOD] through [LAST MONTH OF REFERENCE PERIOD]?

- (1) Yes
- (2) No

READ IF NECESSARY: Include any regular school, such as elementary, high school, or college, or any vocational, technical, or business school beyond high school.

—

-----  
-NEWFULL-

Was [FIRST AND LAST NAME] enrolled full-time or part-time?

(1) Full-time

(2) Part-time

—

-----  
-MNTHENRL-

In which months was [FIRST AND LAST NAME] enrolled in school?

Was [FIRST AND LAST NAME] enrolled in:

(1) Yes

(2) No

[REFERENCE MONTH1] \_\_\_

[REFERENCE MONTH2] \_\_\_

[REFERENCE MONTH3] \_\_\_

[REFERENCE MONTH4] \_\_\_

-----  
-OLDLVL-

Last time, I recorded that [FIRST AND LAST NAME] was enrolled in [PREVIOUS EDUCATIONAL ATTAINMENT]. Was [FIRST AND LAST NAME] enrolled at that level during the period of [FIRST MONTH OF REFERENCE PERIOD] to [LAST MONTH OF REFERENCE PERIOD]?

(1) Yes

(2) No

—

-----  
-NEWLVL-

At what level or grade was [FIRST AND LAST NAME] enrolled?

("College year" indicates the level according to academic standing, not the number of years enrolled in college.)

- (1) Elementary grades 1-8
- (2) High School grades 9-12
- (3) College year 1 (Freshman)
- (4) College year 2 (Sophomore)
- (5) College year 3 (Junior)
- (6) College year 4 (Senior)
- (7) College year 5 (First year graduate or professional school)
- (8) College year 6+ (Second year or higher in graduate or professional school)
- (9) Vocational, technical, or business school beyond high school level
- (10) Enrolled in college, but not working towards degree

—

-----  
-EDCHCK1-

[FIRST AND LAST NAME] said that [FIRST AND LAST NAME] was ENROLLED in [EDUCATIONAL ATTAINMENT]. Earlier I recorded that the highest grade or level [FIRST AND LAST NAME] COMPLETED was [PREVIOUS EDUCATIONAL ATTAINMENT].

Are both of these statements correct?

- (1) Yes, both statements are correct
- (2) Only COMPLETED statement is correct, ENROLLED statement should be changed
- (3) Only ENROLLED statement is correct, COMPLETED statement should be changed
- (4) Both the COMPLETED statement and the ENROLLED statement should be changed

—

-----  
-FXENRL-

At what level or grade was [FIRST AND LAST NAME] enrolled?

("College year" indicates the level according to academic standing, not the number of years enrolled in college.)

- (1) Elementary grades 1-8
- (2) High School grades 9-12
- (3) College year 1 (Freshman)
- (4) College year 2 (Sophomore)
- (5) College year 3 (Junior)
- (6) College year 4 (Senior)
- (7) College year 5 (First year graduate or professional school)
- (8) College year 6+ (Second year or higher in graduate or professional school)
- (9) Vocational, technical, or business school beyond high school level
- (10) Enrolled in college, but not working towards degree

—

-----  
-FXEDUC-

What is the highest level of school [FIRST AND LAST NAME] has completed or the highest degree [FIRST AND LAST NAME] has received?

- |  |   |
|--|---|
| (31) Less than 1st grade   | (44) Bachelors degree (For example: BA, AB, BS)       |
| (32) 1st,2nd,3rd or 4th grade  |   |
| (33) 5th or 6th grade  | (45) Master's degree (For example:MA, MS, MEng, MEd,  |
| (34) 7th or 8th grade  | MSW, MBA)   |
| (35) 9th grade   | (46) Professional School Degree (For example: MD, DDS |
| (36) 10th grade  | DVM, LLB, JD)   |
| (37) 11th grade  | (47) Doctorate degree (For example: PhD, EdD)         |
| (38) 12th grade, no diploma  |   |
| (39) HIGH SCHOOL GRADUATE - high school DIPLOMA<br>or equivalent (For example: GED)                                |   |
| (40) Some college but no degree  |   |
| (41) Diploma or certificate from a vocational, technical,<br>trade or business school beyond the High School level |   |
| (42) Associate degree in college - Occupational/vocational program   |   |
| (43) Associate degree in college - Academic program  |   |

—

-----  
-EDCHCK2-

Was [FIRST AND LAST NAME] enrolled in a program working towards a degree?

(1) Yes

(2) No

—

-----  
-EDFUND-

Last time, I recorded that [FIRST AND LAST NAME] [PREVIOUS EDUCATIONAL ASSISTANCE RECEIPT] during the period [PREVIOUS FIRST MONTH OF REFERENCE PERIOD] through [PREVIOUS LAST MONTH OF REFERENCE PERIOD]. Were any of [FIRST AND LAST NAME] educational expenses during the period [FIRST MONTH OF REFERENCE PERIOD] through the end of [LAST MONTH OF REFERENCE PERIOD] paid for by any type of educational assistance or financial aid?

READ IF NECESSARY: Include financial assistance such as loans, grants, scholarships, employer assistance, veterans benefits, or any other type of financial aid?

(1) Yes

(2) No

—

-----  
-NEWFUND-

Were any of [FIRST AND LAST NAME] educational expenses during the period [FIRST MONTH OF REFERENCE PERIOD] through the end of [LAST MONTH OF REFERENCE PERIOD] paid for by any type of educational assistance or financial aid such as loans, grants, scholarships, employer assistance, veterans benefits, or any other type of financial aid?

(1) Yes

(2) No

—

-----  
-EDASST-

Last time, I recorded that [FIRST AND LAST NAME] received: [PREVIOUS EDUCATIONAL ASSISTANCE TYPE(S)]. During the period from [FIRST MONTH OF REFERENCE PERIOD] to [LAST MONTH OF REFERENCE PERIOD], did [FIRST AND LAST NAME] still receive all of these types of aid OR did they change?

- (1) Yes, SAME types
- (2) No, CHANGE types

—

-----  
-NEWASST-

What kind of educational assistance did [FIRST AND LAST NAME] receive during the period from [FIRST MONTH OF REFERENCE PERIOD] to the end of [LAST MONTH OF REFERENCE PERIOD]? Anything else?

SHOW FLASHCARD J. ENTER ALL THAT APPLY. ENTER N AFTER LAST ENTRY.

- (1) Federal PELL Grant
- (2) Assistance from the Department of Veteran's Affairs (VA) such as GI or Montgomery Bill, Survivors and Dependents, other Veterans' Administration Educational Assistance Programs.
- (3) College (or Federal) Work Study Program
- (4) Any other Federal grant or program; for example, SEOG, Health or Nursing Grant, ROTC, NSF Grant
- (5) A loan that has to be repaid, for example, Stafford, Perkins, or SLS
- (6) A grant, scholarship, or tuition remission from the school attended
- (7) A teaching or research assistantship from the school attended
- (8) A grant or scholarship from the state, such as SSIGP, Douglas Scholarships
- (9) A grant or scholarship from some other source, such as a foundation, corporation, or community group, National Merit Scholarship, etc.
- (10) Assistance provided by [FIRST AND LAST NAME] employer
- (11) Aid from some other source (EXCLUDE all direct aid from parents, including trusts or college savings funds)

—

— — — — — — —

---

-HINONE-

I recorded that [NAME OF PERSON/YOU] [WAS/WERE] NOT covered by any health insurance plan during the months of [MONTHS OF REFERENCE PERIOD PERSON NOT COVERED]. Which ONE OR MORE of these reasons describe why [NAME OF PERSON/YOU] [WAS/WERE] not covered?

**(SHOW FLASHCARD I.) ENTER "N" AFTER LAST ENTRY**

- (01) Too expensive, can't afford health insurance
- (02) No health insurance offered by (employer of self, spouse, or parent)
- (03) Not working at a job long enough to qualify
- (04) Job layoff, job loss, or any reason related to unemployment
- (05) Not eligible because working part time or temporary job
- (06) Can't obtain insurance because of poor health, illness, age, or a pre-existing condition
- (07) Dissatisfied with previous insurance OR don't believe in insurance
- (08) Have been healthy, not much sickness in the family, haven't needed health insurance
- (09) Able to go to VA or military hospital for medical care
- (10) Covered by some other health plan, such as Medicaid
- (11) No longer covered by parents policy
- (12) Other

\_\_\_\_\_

---

-HISPEC-

Specify the exact "OTHER" reason not covered by health insurance.

\_\_\_\_\_

## Programs

---

-PROGINTRO-

Now we are going to ask some questions about government programs.

PRESS ENTER TO CONTINUE

—

---

-MTHRNT-

Excluding any rent subsidies, how much [DO/DOES] [FIRST AND LAST NAME] pay in monthly rent?

(N) None

—

---

-MTHRNTCK-

FR NOTE: LAST WAVE, RENT REPORTED WAS \$ [RENT AMOUNT].  
(DO NOT PROVIDE AMOUNT UNLESS RESPONDENT ASKS.)

This is substantially different from the amount I recorded last time. Has there been a change in the monthly rent since last time?

(1) Yes

(2) No

—

---

-UTILYNCK2-

Last time I recorded [YOU/HE/SHE] paid for utilities such as water, electricity, gas, or oil.

[DID YOU/IN ADDITION TO RENT DID YOU] still pay for any utilities (EXCLUDE TELEPHONE)?

(1) Yes

(2) No

—

---

-UTILYN-

[DID YOU/ IN ADDITION TO RENT DID YOU] pay for any utilities such as water, electricity, gas, or oil?  
Exclude telephone.

- (1) Yes
- (2) No

—

---

-EGYASSYNCK2-

Last time I recorded this household was receiving energy assistance. Did you receive any energy assistance from [MONTH1] first to the end of [MONTH4]?

- (1) Yes
- (2) No

—

---

-EGYASSYN-

Has this household received any energy assistance from the Federal, state, or local government from [MONTH1] 1st to the end of [MONTH4]?

- (1) Yes
- (2) No

—

---

-----  
-EGYPAYMT-

[EARLIER YOU SAID THIS HOUSEHOLD RECEIVED ENERGY ASSISTANCE]  
Was this assistance received in the form of -

- (1) Checks sent to household
- (2) Coupons or vouchers sent to household
- (3) Payments sent directly to utility company, fuel dealer, or landlord

[bold] (MARK ALL THAT APPLY. ENTER "N" AFTER LAST ENTRY.)

\_\_\_

-----  
-EGYAMT-

What was the total amount of the energy assistance received by this household from [MONTH1] first to the end of [MONTH4]?

\_\_\_

-----  
-HOTLUNYN-

[LAST TIME I RECORDED THAT AT LEAST ONE CHILD/ NO CHILD GOT A LUNCH AT SCHOOL]

From [MONTH1] 1st to the end of [MONTH4], [DID CHILD'S FIRST AND LAST NAME/ ANY OF THE CHILDREN IN THIS HOUSEHOLD] usually get a lunch offered at school?

- (1) Yes
- (2) No

\_\_\_

-----  
-WHOHOTLN-

From [MONTH1] first to the end of [MONTH4], which children usually got a lunch at school?

ENTER THE LINE NUMBER OF CHILDREN WHO GOT A LUNCH AT SCHOOL.  
ENTER (N) AFTER ENTERING LAST LINE NUMBER.

\_\_\_ \_\_\_ \_\_\_  
\_\_\_ \_\_\_ \_\_\_

-----  
-FREELNYN-

(REFERENCE PERIOD = [MONTH1] first to the end of [MONTH4])

Were any of the lunches free or reduced price because [THIS CHILD/ THESE CHILDREN] qualified for the Federal School Lunch Program?

- (1) Yes
- (2) No

\_\_\_

-----  
-FREREDLN-

(REFERENCE PERIOD = [MONTH1] first to the end of [MONTH4])

Were they free or reduced price?

- (1) Free lunch
- (2) Reduced-price lunch

\_\_\_

-----  
-BRKFSTYN-

[LAST TIME I RECORDED AT LEAST ONE CHILD/ NO CHILD IN THIS HOUSEHOLD GOT BREAKFAST AT SCHOOL]

From [MONTH1] 1st to the end of [MONTH4] [DID CHILD'S FIRST AND LAST NAME/ ANY OF THE CHILDREN IN THIS HOUSEHOLD] usually get breakfast at school under the Federal School Breakfast Program?

(1) Yes

(2) No

—

-----  
-WHOBRK-

Which children usually got breakfast at school?

ENTER LINE NUMBER OF CHILDREN WHO GOT BREAKFAST AT SCHOOL.  
ENTER (N) AFTER ENTERING LAST LINE NUMBER

— — —  
— — —

-----  
-FREEBRK-

(REFERENCE PERIOD = [MONTH1] first to the end of [MONTH4])

Were any of the breakfasts free or reduced-price?

(1) Yes

(2) No

—

-----  
-FREREDBK-

(REFERENCE PERIOD = [MONTH1] first to the end of  
[MONTH4])

Were they free or reduced price?

- (1) Free breakfast
- (2) Reduced-price breakfast

—

**SIPP-16004**  
(5-7-98)



U.S. Department  
of Commerce

BUREAU OF THE  
CENSUS

# **Survey of Income and Program Participation**

# **Field Representative's Flashcard and Information Booklet**

*(Cut along broken lines)*

# FLASHCARD INDEX

Flashcard Index

Booklet Instructions

**A** – Relationship to Reference Person

**B** – Educational Attainment

**C** – Race

**D** – Origin

**E** – Calendar of Reference Months

**F** – Assets Owned

**G** – Colors of the Envelopes from the Social Security Administration

**H** – Sample Medicare Cards

**I** – Reason Not Covered by Health Insurance

**J** – Educational Assistance

Respondent Rules

Household Member Summary Table

Privacy Act Statement

Talking Points for Field Representatives

Uses of SIPP

Elderly Respondents

Poor Respondents

Wealthy Respondents

Middle Income Respondents

(Cut along broken lines)

## **BOOKLET INSTRUCTIONS**

- 1.** Cards E are reference calendars. You will use a different Card E for each month you interview. Keep only the current month reference calendar in your booklet, and place remaining calendars for future interview months with your other supplies. Discard calendars for previous interview months.
- 2.** During the interview, you may find it easier to handle the flashcards if you remove them from the binder.

(Cut along broken lines)

# CARD A

A

## RELATIONSHIP TO REFERENCE PERSON

**20 – Spouse (Husband or Wife)**

**21 – Unmarried Partner**

**22 – Child**

**23 – Grandchild**

**24 – Parent (Mother or Father)**

**25 – Brother or Sister**

**26 – Other Relative of Reference Person  
(Uncle, Cousin, Mother-In-Law,  
Father-In-Law, etc.)**

**27 – Foster Child**

**28 – Housemate/Roommate**

**29 – Roomer/Boarder**

**30 – Other Non-Relative of Reference Person**

(Cut along broken lines)

# CARD B

## EDUCATIONAL ATTAINMENT

- |  |   |
|--|---|
| <b>31</b> – Less than 1st grade  | <b>40</b> – Some college but no degree  |
| <b>32</b> – 1st, 2nd, 3rd, or 4th grade  | <b>41</b> – Diploma or certificate from a vocational, technical, trade or business school <b>BEYOND</b> the High School level |
| <b>33</b> – 5th or 6th grade   | <b>42</b> – Associate degree in college – Occupational/Vocational program   |
| <b>34</b> – 7th or 8th grade   | <b>43</b> – Associate degree in college – Academic program  |
| <b>35</b> – 9th grade  | <b>44</b> – Bachelor’s degree (For example: BA, AB, BS)   |
| <b>36</b> – 10th grade   | <b>45</b> – Master’s degree (For example: MA, MS, MEng, MEd, MSW, MBA)  |
| <b>37</b> – 11th grade   | <b>46</b> – Professional School degree (For example: MD, DDS, DVM, LLB, JD)   |
| <b>38</b> – 12th grade, no diploma   | <b>47</b> – Doctorate degree (For example: PhD, EdD)  |
| <b>39</b> – HIGH SCHOOL GRADUATE – high school <b>DIPLOMA</b> or equivalent (For example, GED) |   |

**B**

*(Cut along broken lines)*

# CARD C

## RACE

**WHICH OF THE CATEGORIES ON THIS CARD  
BEST DESCRIBES YOUR RACE?**

**1** – White

**2** – Black

**3** – American Indian, Eskimo, or Aleut

**4** – Asian or Pacific Islander

**C**

*(Cut along broken lines)*

# CARD D

## ORIGIN

**Which of the categories on this card best describes your origin or descent?**

### European Origin

- 1** – Canadian
- 2** – Dutch
- 3** – English
- 4** – French
- 5** – French-Canadian
- 6** – German
- 7** – Hungarian
- 8** – Irish
- 9** – Italian
- 10** – Polish
- 11** – Russian
- 12** – Scandinavian
- 13** – Scotch/Irish
- 14** – Scottish
- 15** – Slovak
- 16** – Welsh
- 17** – Other European

### Hispanic Origin

- 20** – Mexican
- 21** – Mexican-American
- 22** – Chicano
- 23** – Puerto Rican
- 24** – Cuban
- 25** – Central American
- 26** – South American
- 27** – Dominican Republic
- 28** – Other Hispanic

### Other Origins

- 30** – African-American or Afro-American
- 31** – American Indian, Eskimo or Aleut
- 32** – Arab
- 33** – Asian
- 34** – Pacific Islander
- 35** – West Indian
- 39** – Another group not listed

**D**

(Cut along broken lines)

# CARD E

## FEBRUARY 1996 INTERVIEW

### CALENDAR OF REFERENCE MONTHS

OCTOBER 1995 (4 months ago)							Week No.	NOVEMBER 1995 (3 months ago)							Week No.
S	M	T	W	T	F	S		S	M	T	W	T	F	S	
1	2	3	4	5	6	7	1				1	2	3	4	5
8	9	10	11	12	13	14	2	5	6	7	8	9	10	11	6
15	16	17	18	19	20	21	3	12	13	14	15	16	17	18	7
22	23	24	25	26	27	28	4	19	20	21	22	23	24	25	8
29	30	31					(5)	26	27	28	29	30			9

DECEMBER 1995 (2 months ago)							Week No.	JANUARY 1996 (1 month ago)							Week No.
S	M	T	W	T	F	S		S	M	T	W	T	F	S	
					1	2	(9)		1	2	3	4	5	6	14
3	4	5	6	7	8	9	10	7	8	9	10	11	12	13	15
10	11	12	13	14	15	16	11	14	15	16	17	18	19	20	16
17	18	19	20	21	22	23	12	21	22	23	24	25	26	27	17
24	25	26	27	28	29	30	13	28	29	30	31				18
31							(14)								

FEBRUARY 1996						
S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29		

○ Holidays

E

(Cut along broken lines)

# CARD E

## MARCH 1996 INTERVIEW

### CALENDAR OF REFERENCE MONTHS

NOVEMBER 1995 (4 months ago)							Week No.	DECEMBER 1995 (3 months ago)							Week No.
S	M	T	W	T	F	S		S	M	T	W	T	F	S	
			1	2	3	4	1						1	2	(5)
5	6	7	8	9	10	11	2	3	4	5	6	7	8	9	6
12	13	14	15	16	17	18	3	10	11	12	13	14	15	16	7
19	20	21	22	23	24	25	4	17	18	19	20	21	22	23	8
26	27	28	29	30			5	24	25	26	27	28	29	30	9
								31							(10)

JANUARY 1996 (2 months ago)							Week No.	FEBRUARY 1996 (1 month ago)							Week No.
S	M	T	W	T	F	S		S	M	T	W	T	F	S	
	1	2	3	4	5	6	10					1	2	3	(14)
7	8	9	10	11	12	13	11	4	5	6	7	8	9	10	15
14	15	16	17	18	19	20	12	11	12	13	14	15	16	17	16
21	22	23	24	25	26	27	13	18	19	20	21	22	23	24	17
28	29	30	31				14	25	26	27	28	29			18

MARCH 1996						
S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

○ Holidays

(Cut along broken lines)

E

# CARD E

## APRIL 1997 INTERVIEW

### CALENDAR OF REFERENCE MONTHS

DECEMBER 1996 (4 months ago)							Week No.	JANUARY 1997 (3 months ago)							Week No.
S	M	T	W	T	F	S		S	M	T	W	T	F	S	
1	2	3	4	5	6	7	1				①	2	3	4	5
8	9	10	11	12	13	14	2	5	6	7	8	9	10	11	6
15	16	17	18	19	20	21	3	12	13	14	15	16	17	18	7
22	23	24	②⑤	26	27	28	4	19	②⑩	21	22	23	24	25	8
29	30	31					(5)	26	27	28	29	30	31		9

FEBRUARY 1997 (2 months ago)							Week No.	MARCH 1997 (1 month ago)							Week No.
S	M	T	W	T	F	S		S	M	T	W	T	F	S	
						1	(9)							1	(13)
2	3	4	5	6	7	8	10	2	3	4	5	6	7	8	14
9	10	11	12	13	14	15	11	9	10	11	12	13	14	15	15
16	①⑦	18	19	20	21	22	12	16	17	18	19	20	21	22	16
23	24	25	26	27	28	29	13	23	24	25	26	27	28	29	17
								③⑩	31						(17)

APRIL 1997						
S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

○ Holidays

E

(Cut along broken lines)

# CARD E

## MAY 1997 INTERVIEW

### CALENDAR OF REFERENCE MONTHS

JANUARY 1997 (4 months ago)							Week No.	FEBRUARY 1997 (3 months ago)							Week No.
S	M	T	W	T	F	S		S	M	T	W	T	F	S	
			①	2	3	4	1							1	(5)
5	6	7	8	9	10	11	2	2	3	4	5	6	7	8	6
12	13	14	15	16	17	18	3	9	10	11	12	13	14	15	7
19	②⑩	21	22	23	24	25	4	16	③⑰	18	19	20	21	22	8
26	27	28	29	30	31		5	23	24	25	26	27	28	29	9

MARCH 1997 (2 months ago)							Week No.	APRIL 1997 (1 month ago)							Week No.
S	M	T	W	T	F	S		S	M	T	W	T	F	S	
						1	(9)			1	2	3	4	5	14
2	3	4	5	6	7	8	10	6	7	8	9	10	11	12	15
9	10	11	12	13	14	15	11	13	14	15	16	17	18	19	16
16	17	18	19	20	21	22	12	20	21	22	23	24	25	26	17
23	24	25	26	27	28	29	13	27	28	29	30				18
④⑳	31						(14)								

MAY 1997						
S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	⑤㉗	28	29	30	31

○ Holidays

E

(Cut along broken lines)

# CARD E

## JUNE 1997 INTERVIEW

### CALENDAR OF REFERENCE MONTHS

FEBRUARY 1997 (4 months ago)							Week No.	MARCH 1997 (3 months ago)							Week No.
S	M	T	W	T	F	S		S	M	T	W	T	F	S	
						1	(1)							1	(4)
2	3	4	5	6	7	8	1	2	3	4	5	6	7	8	5
9	10	11	12	13	14	15	2	9	10	11	12	13	14	15	6
16	17	18	19	20	21	22	3	16	17	18	19	20	21	22	7
23	24	25	26	27	28		4	23	24	25	26	27	28	29	8
								30	31						(9)

APRIL 1997 (2 months ago)							Week No.	MAY 1997 (1 month ago)							Week No.
S	M	T	W	T	F	S		S	M	T	W	T	F	S	
		1	2	3	4	5	9					1	2	3	(13)
6	7	8	9	10	11	12	10	4	5	6	7	8	9	10	14
13	14	15	16	17	18	19	11	11	12	13	14	15	16	17	15
20	21	22	23	24	25	26	12	18	19	20	21	22	23	24	16
27	28	29	30				13	25	26	27	28	29	30	31	17

JUNE 1997							
S	M	T	W	T	F	S	
	1	2	3	4	5	6	7
8	9	10	11	12	13	14	
15	16	17	18	19	20	21	
22	23	24	25	26	27	28	
29	30						

○ Holidays

E

(Cut along broken lines)

# CARD E

## JULY 1997 INTERVIEW

### CALENDAR OF REFERENCE MONTHS

MARCH 1997 (4 months ago)							Week No.	APRIL 1997 (3 months ago)							Week No.
S	M	T	W	T	F	S		S	M	T	W	T	F	S	
						1	(1)			1	2	3	4	5	5
2	3	4	5	6	7	8	1	6	7	8	9	10	11	12	6
9	10	11	12	13	14	15	2	13	14	15	16	17	18	19	7
16	17	18	19	20	21	22	3	20	21	22	23	24	25	26	8
23	24	25	26	27	28	29	4	27	28	29	30				9
⓪ 30	31						(5)								

MAY 1997 (2 months ago)							Week No.	JUNE 1997 (1 month ago)							Week No.
S	M	T	W	T	F	S		S	M	T	W	T	F	S	
				1	2	3	(9)	1	2	3	4	5	6	7	14
4	5	6	7	8	9	10	10	8	9	10	11	12	13	14	15
11	12	13	14	15	16	17	11	15	16	17	18	19	20	21	16
18	19	20	21	22	23	24	12	22	23	24	25	26	27	28	17
25	⓪ 26	27	28	29	30	31	13	29	30						(17)

JULY 1996						
S	M	T	W	T	F	S
		1	2	3	⓪ 4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

⓪ Holidays

E

(Cut along broken lines)

# CARD E

## AUGUST 1997 INTERVIEW

### CALENDAR OF REFERENCE MONTHS

APRIL 1997 (4 months ago)							Week No.	MAY 1997 (3 months ago)							Week No.
S	M	T	W	T	F	S		S	M	T	W	T	F	S	
		1	2	3	4	5	1					1	2	3	(5)
6	7	8	9	10	11	12	2	4	5	6	7	8	9	10	6
13	14	15	16	17	18	19	3	11	12	13	14	15	16	17	7
20	21	22	23	24	25	26	4	18	19	20	21	22	23	24	8
27	28	29	30				5	25	26	27	28	29	30	31	9

JUNE 1997 (2 months ago)							Week No.	JULY 1997 (1 month ago)							Week No.
S	M	T	W	T	F	S		S	M	T	W	T	F	S	
1	2	3	4	5	6	7	10			1	2	3	4	5	14
8	9	10	11	12	13	14	11	6	7	8	9	10	11	12	15
15	16	17	18	19	20	21	12	13	14	15	16	17	18	19	16
22	23	24	25	26	27	28	13	20	21	22	23	24	25	26	17
29	30						(14)	27	28	29	30	31			18

AUGUST 1997						
S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

○ Holidays

(Cut along broken lines)

E

# CARD E

## SEPTEMBER 1997 INTERVIEW

### CALENDAR OF REFERENCE MONTHS

MAY 1997 (4 months ago)							Week No.	JUNE 1997 (3 months ago)							Week No.
S	M	T	W	T	F	S		S	M	T	W	T	F	S	
				1	2	3	(1)	1	2	3	4	5	6	7	5
4	5	6	7	8	9	10	2	8	9	10	11	12	13	14	6
11	12	13	14	15	16	17	3	15	16	17	18	19	20	21	7
18	19	20	21	22	23	24	4	22	23	24	25	26	27	28	8
25	26	27	28	29	30	31	5	29	30						(9)

JULY 1997 (2 months ago)							Week No.	AUGUST 1997 (1 month ago)							Week No.
S	M	T	W	T	F	S		S	M	T	W	T	F	S	
		1	2	3	4	5	9						1	2	(13)
6	7	8	9	10	11	12	10	3	4	5	6	7	8	9	14
13	14	15	16	17	18	19	11	10	11	12	13	14	15	16	15
20	21	22	23	24	25	26	12	17	18	19	20	21	22	23	16
27	28	29	30	31			13	24	25	26	27	28	29	30	17
								31							(17)

SEPTEMBER 1997						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

○ Holidays

E

(Cut along broken lines)

# CARD E

## OCTOBER 1997 INTERVIEW

### CALENDAR OF REFERENCE MONTHS

JUNE 1997 (4 months ago)							Week No.
S	M	T	W	T	F	S	
1	2	3	4	5	6	7	1
8	9	10	11	12	13	14	2
15	16	17	18	19	20	21	3
22	23	24	25	26	27	28	4
29	30						(5)

JULY 1997 (3 months ago)							Week No.
S	M	T	W	T	F	S	
		1	2	3	4	5	5
6	7	8	9	10	11	12	6
13	14	15	16	17	18	19	7
20	21	22	23	24	25	26	8
27	28	29	30	31			9

AUGUST 1997 (2 months ago)							Week No.
S	M	T	W	T	F	S	
					1	2	(9)
3	4	5	6	7	8	9	10
10	11	12	13	14	15	16	11
17	18	19	20	21	22	23	12
24	25	26	27	28	29	30	13
31							(14)

SEPTEMBER 1997 (1 month ago)							Week No.
S	M	T	W	T	F	S	
	1	2	3	4	5	6	14
7	8	9	10	11	12	13	15
14	15	16	17	18	19	20	16
21	22	23	24	25	26	27	17
28	29	30					(17)

OCTOBER 1996						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

○ Holidays

E

(Cut along broken lines)

# CARD E

## NOVEMBER 1997 INTERVIEW

### CALENDAR OF REFERENCE MONTHS

JULY 1997 (4 months ago)							Week No.
S	M	T	W	T	F	S	
		1	2	3	④	5	1
6	7	8	9	10	11	12	2
13	14	15	16	17	18	19	3
20	21	22	23	24	25	26	4
27	28	29	30	31			5

AUGUST 1997 (3 months ago)							Week No.
S	M	T	W	T	F	S	
					1	2	(5)
3	4	5	6	7	8	9	6
10	11	12	13	14	15	16	7
17	18	19	20	21	22	23	8
24	25	26	27	28	29	30	9
31							(10)

SEPTEMBER 1997 (2 months ago)							Week No.
S	M	T	W	T	F	S	
	①	2	3	4	5	6	10
7	8	9	10	11	12	13	11
14	15	16	17	18	19	20	12
21	22	23	24	25	26	27	13
28	29	30					(14)

OCTOBER 1997 (1 month ago)							Week No.
S	M	T	W	T	F	S	
			1	2	3	4	14
5	6	7	8	9	10	11	15
12	⑬	14	15	16	17	18	16
19	20	21	22	23	24	25	17
26	27	28	29	30	31		18

NOVEMBER 1997						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	⑪	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	⑳	28	29
30						

○ Holidays

E

(Cut along broken lines)

# CARD E

## DECEMBER 1997 INTERVIEW

### CALENDAR OF REFERENCE MONTHS

AUGUST 1997 (4 months ago)							Week No.
S	M	T	W	T	F	S	
					1	2	(1)
3	4	5	6	7	8	9	1
10	11	12	13	14	15	16	2
17	18	19	20	21	22	23	3
24	25	26	27	28	29	30	4
31							(5)

SEPTEMBER 1997 (3 months ago)							Week No.
S	M	T	W	T	F	S	
	①	2	3	4	5	6	5
7	8	9	10	11	12	13	6
14	15	16	17	18	19	20	7
21	22	23	24	25	26	27	8
28	29	30					(9)

OCTOBER 1997 (2 months ago)							Week No.
S	M	T	W	T	F	S	
			1	2	3	4	9
5	6	7	8	9	10	11	10
12	⑬	14	15	16	17	18	11
19	20	21	22	23	24	25	12
26	27	28	29	30	31		13

NOVEMBER 1997 (1 month ago)							Week No.
S	M	T	W	T	F	S	
						1	(13)
2	3	4	5	6	7	8	14
9	10	⑪	12	13	14	15	15
16	17	18	19	20	21	22	16
23	24	25	26	⑳	28	29	17
30							(17)

DECEMBER 1997						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	⑳	26	27
28	29	30	31			

○ Holidays

E

(Cut along broken lines)

# **CARD F**

## **TYPES OF ASSETS**

U.S. Government Savings Bonds (E or EE)

IRA or Keogh Account

401K or Thrift Plan

Interest Earning Checking Account

Savings Account

Money Market Deposit Account

Certificate of Deposit (CD)

Mutual Funds

Stocks

Municipal or Corporate Bonds

U.S. Government Securities

Mortgages from which Payments are Received

Rental Property

Royalties

Other financial Investments not already mentioned

**F**

*(Cut along broken lines)*

# CARD G

## COLORS OF THE ENVELOPES FROM THE SOCIAL SECURITY ADMINISTRATION



BLUE



BUFF

**G**

*(Cut along broken lines)*

# CARD H

## SAMPLE MEDICARE CARDS

<b>MEDICARE</b>  <b>HEALTH INSURANCE</b>	
<b>SOCIAL SECURITY ACT</b>	
NAME OF BENEFICIARY <b>JOHN Q PUBLIC</b>	
CLAIM NUMBER <b>000-00-0000-A</b>	SEX <b>MALE</b>
IS ENTITLED TO <b>HOSPITAL</b>	EFFECTIVE DATE <b>(PART A) 12-1-90</b>
<b>MEDICAL</b>	<b>(PART B) 12-1-90</b>
SIGN HERE → <i>John Q. Public</i>	

<b>MEDICARE</b>  <b>HEALTH INSURANCE</b>	
<b>RAILROAD RETIREMENT BOARD</b>	
NAME OF BENEFICIARY <b>JOHN Q PUBLIC</b>	
CLAIM NUMBER	SEX <b>MALE</b>
IS ENTITLED TO <b>HOSPITAL</b>	EFFECTIVE DATE <b>(PART A) 12-1-90</b>
<b>MEDICAL</b>	<b>(PART B) 12-1-90</b>
SIGN HERE → <i>John Q. Public</i>	

**H**

(Cut along broken lines)

# CARD I

## REASONS NOT COVERED BY HEALTH INSURANCE

Which one or more of these reasons describe why you were not covered by health insurance during this time?

- 1** – Too expensive, can't afford health insurance
- 2** – No health insurance offered (by employer of self, spouse or parent)
- 3** – Not working at a job long enough to qualify
- 4** – Job layoff, job loss, or any reason related to unemployment
- 5** – Not eligible because working part time or temporary job
- 6** – Can't obtain insurance because of poor health, illness, age, or a pre-existing condition
- 7** – Dissatisfied with previous insurance OR don't believe in insurance
- 8** – Have been healthy, not much sickness in the family, haven't needed health insurance
- 9** – Able to go to VA or military hospital for medical care
- 10** – Covered by some other health plan, such as Medicaid
- 11** – No longer covered by parents' policy
- 12** – Other

(Cut along  
broken lines)

# CARD J

## EDUCATIONAL ASSISTANCE

- 1** – Federal PELL Grant
- 2** – Assistance from the Department of Veteran’s Affairs (VA) such as GI or Montgomery Bill, Survivors and Dependents, other Veterans’ Administration Educational Assistance Programs
- 3** – College (or Federal) Work Study Program
- 4** – Any other FEDERAL grant or program: for example, SEOG, Health or Nursing Grant, ROTC, NSF Grant
- 5** – A loan that has to be repaid, for example, Stafford, Perkins, or SLS
- 6** – A grant, scholarship, or tuition remission FROM THE SCHOOL ATTENDED
- 7** – A teaching or research assistantship from the school attended
- 8** – A grant or scholarship FROM THE STATE, such as SSIGP, Douglas Scholarships
- 9** – A grant or scholarship from some other source, such as a foundation, corporation, or community group, National Merit Scholarship, etc.
- 10** – Assistance provided by employer
- 11** – Aid from some other source (EXCLUDE all direct aid from parents, including trusts or college savings funds)

# RESPONDENT RULES

## HOUSEHOLD RESPONDENT

Any household member 15 years old or older who is physically and mentally competent and knowledgeable may answer the control card questions and questions about the household as a unit.

## HOUSEHOLD MEMBER 15 YEARS OF AGE OR OLDER

Each household member 15 years old or older, present at the time of interview, should respond for himself/herself. If a 15+ person is physically or mentally incompetent, select a proxy respondent. Also select a proxy respondent for a person absent at the time of interview. Any **knowledgeable** household member who is 15 years old or older may serve as proxy. Following is a chart for your use in determining who to interview. The choices are listed in order of priority.

INTERVIEW RESPONDENT PRIORITY RULES	
WAVE	FIRST FAMILY MEMBER INTERVIEW OR RETURN VISIT INTERVIEW
1	<ol style="list-style-type: none"><li>1. Self</li><li>2. Spouse (if any)</li><li>3. Other proxy</li></ol>
2	<ol style="list-style-type: none"><li>1. Self</li><li>2. Spouse (if any)</li><li>3. Proxy last visit</li><li>4. New proxy</li></ol>
3-8	<ol style="list-style-type: none"><li>1. Self</li><li>2. Spouse (if any)</li><li>3. Proxy last visit</li><li>4. Proxy at another visit</li><li>5. New proxy</li></ol>

If a person wishes to act as a proxy but is not a household member, you **must** call your supervisor for permission before interviewing the proxy. Enter a note in Case Management using F7.

## SUMMARY TABLE FOR DETERMINING WHO IS TO BE INCLUDED AS A MEMBER OF THE HOUSEHOLD

	Include as member of household?	
<b>A. PERSON STAYING IN SAMPLE UNIT AT TIME OF INTERVIEW</b>		
<b>Any person in unit including members of family, lodgers, servants, visitors, etc.</b>		
1. Ordinarily stay here all the time (sleep here) .....	Yes	
2. Here temporarily – no living quarters held elsewhere .....	Yes	
3. Here temporarily – living quarters held elsewhere .....		No
<b>In Armed Forces</b>		
1. Stationed in this locality – usually sleep here .....	Yes	
2. Temporarily here on leave – stationed elsewhere .....		No
<b>Student – Here temporarily attending school – living quarters held for person elsewhere</b>		
1. Not married or not accompanied by own family .....		No
2. Married and accompanied by own family .....	Yes	
3. Student nurse attending school nearby .....	Yes	
<b>B. ABSENT PERSON WHO USUALLY LIVES HERE IN SAMPLE UNIT</b>		
<b>Inmate of institutional special place – Absent because inmate in an institutional special place regardless of whether or not living quarters held for person here .....</b>		
		No
<b>Persons temporarily absent on vacation, in general hospital, etc. (Including veterans' facilities that are general hospitals) – Living quarters held here for person .....</b>		
	Yes	
<b>Absent in connection with job</b>		
1. Living quarters held here for person – temporarily absent while "on the road" in connection with job (e.g., traveling salesperson, railroad worker, bus driver, seaman) .....	Yes	
2. Living quarters held here and elsewhere for person but comes here infrequently (e.g., construction engineer) .....		No
3. Living quarters held here at home for unmarried college student working away from home during summer school vacation .....	Yes	
<b>In Armed Forces – Currently stationed elsewhere .....</b>		
		No
<b>In school – Away temporarily attending school – living quarters held here for person</b>		
1. Not married or not accompanied by own family .....	Yes	
2. Married and accompanied by own family .....		No
3. Attending school overseas .....		No
4. Student nurse living at school .....		No
<b>C. EXCEPTIONS AND DOUBTFUL CASES</b>		
<b>Person with two concurrent residences</b>		
1. Regularly sleep greater part of week in another locality .....		No
2. Regularly sleep greater part of week here .....	Yes	
<b>Citizen of foreign country temporarily in the United States</b>		
1. Living on premises of an Embassy, Ministry, Legation, Chancellery, or Consulate .....		No
2. Not living on premises of an Embassy, Ministry, etc. –		
a. If living and studying here and no usual place of residence elsewhere in the United States .....	Yes	
b. If living and working here and no usual place of residence elsewhere in the United States .....	Yes	
c. If merely visiting or traveling in the United States .....		No

# **PRIVACY ACT STATEMENT**

**"The Bureau of the Census is conducting the Survey of Income and Program Participation to gather information about employment, income, and the economic situation of persons and families who live in the United States. All survey information will be used for statistical purposes only. The survey is being conducted under the authority of title 13, United States Code, section 182.**

**"Participation in the survey is voluntary, and there are no penalties for failure to answer any questions. However, your cooperation is extremely important to insure the completeness and accuracy of the final results."**

# **TALKING POINTS FOR FIELD REPRESENTATIVES**

## **Uses of SIPP**

The Survey of Income and Program Participation (SIPP) is used to learn and understand more about the economic well being and changes of the Nation. Because SIPP follows people over time and because thousands of people have responded to this survey, we are able to provide unique answers or insights into key policy questions.

SIPP data are used by Congress, the White House, and state and local officials to make informed decisions about important policy questions facing the Nation. SIPP data provides meaningful information and insight into the economic well-being of the Nation. Data from the SIPP has been used directly or indirectly in many policy debates, such as:

- Health Coverage Reform Act and Legislation
- Minimum Wage Act and Legislation
- The Americans for Disabilities Act and Legislation
- Welfare Reform Act and Legislation

Listed on the next few pages are some of the ways SIPP data is used to provide information and insight about the following groups of respondents:

- Elderly Respondents
- Poor Respondents
- Wealthy Respondents
- Middle-Income Respondents

# ELDERLY RESPONDENTS

- ▶ SIPP has been used to measure the impact on the value and sufficiency of Social Security payments due to:
  - Changes in the cost of medical insurance, especially supplemental insurance.
  - Changes in the amount of income received and how people meet living expenses.
- ▶ SIPP measures the changes that affect their ability to maintain their independence and life style, such as:
  - The effects of inflation on the value of Social Security and Pensions.
  - The effects of changes in savings and asset ownership over time and the ability of the elderly to maintain their pre-retirement standard of living.
  - The effects of lower social security and pension payments on surviving spouses.
  - The effect of the movement of the elderly into an extended family and their ability to retain independence.
  - The transition of the elderly into group homes and nursing homes.
- ▶ SIPP allows testing of alternative approaches to improve economic standing of the elderly.
- ▶ SIPP measures the changes that affect people's qualification for programs such as food stamps, housing and energy assistance, Medicaid, etc.
  - Changes in the amount of disposable income.
  - Changes in the value of real assets as people cover current expenses.
- ▶ Measures the interaction between public and private program participation.
- ▶ Measures the impact on the Nation's well-being as the population grows older, such as:
  - Changes in savings plans such as IRAs, 401(k)s, pensions plans, etc., as the baby boomers reach retirement.
  - Changes in real assets such as real estate, mutual funds, and stocks as the population ages.
  - Changes in health insurance coverage, especially shifts in types of coverage over time from group or individual policies to HMOs.
- ▶ SIPP measures the changes in family composition and the impact on the economic well-being of the family, after the loss of the main wage earner through death or divorce.

## **POOR RESPONDENTS**

- ▶ SIPP measures the effects of changes in the economic well-being of those in poverty, such as:
  - Changes in the minimum wage.
  - Changes in program qualification requirements and benefits.
  - Changes in family composition.
- ▶ SIPP measures the effect of program changes on those in poverty, such as Food Stamps, AFDC, WIC, Medicaid, etc.
  - Changes in eligibility requirements.
  - Changes in the benefits provided.
  - Changes in the duration of coverage or waiting period before coverage begins.
- ▶ SIPP measures the effectiveness of public assistance programs on those in poverty, such as:
  - The movement into and out of the labor force.
  - The duration without coverage by health insurance.
  - The effect of poverty in depleting real assets.
  - The effect of poverty on educational attainment.
  - Showing who actually participates in the programs.
- ▶ SIPP measures the effect that the Federal Earned Income Tax Credit has on those in poverty.
- ▶ SIPP measures the impact on educational attainment when the government modifies student loan programs and educational grants.
- ▶ SIPP measures the effectiveness of government programs to meet the needs of people in need even for short periods, such as:
  - The effectiveness of assistance programs to meet the short term needs of people temporarily unemployed.
  - The effectiveness of programs to reach the intended population.
  - The impact on health care insurance participation during periods of unemployment.
- ▶ SIPP measures the changes in family composition and the impact on the economic well-being of the family, after the loss of the main wage earner through death or divorce.

# WEALTHY RESPONDENTS

- ▶ SIPP measures the impact of changes in government tax policies on savings and assets.
  - Changes in the capital gains tax.
  - Changes in estate taxes.
  - Modification of tax credits or deductions.
  - Changes in IRA and 401(k) eligibility and limits.
  - Changes in age eligibility for withdrawing funds from IRA or 401(k) plans.
  
- ▶ SIPP measures the impact of corporate down-sizing on economic well-being, such as:
  - The effect on labor force participation.
  - The effect on savings and real assets as people try to maintain their standard of living.
  - The effect on educational attainment of family members.
  - The effect on child care arrangements during times of unemployment.
  
- ▶ Measures the impact on the Nation's well-being as the population grows older, such as:
  - Changes in savings plans such as IRAs, 401(k)s, pensions plans, etc., as the baby boomers reach retirement.
  - Changes in real assets such as real estate, mutual funds, and stocks as the population ages.
  - Changes in health insurance coverage, especially shifts in types of coverage over time from group or individual policies to HMOs.
  
- ▶ SIPP measures the impact of changes in health insurance programs.
  - Changes in the cost of insurance policies.
  - Changes in the composition of those covered.
  - Changes in coverage when a person changes jobs.
  
- ▶ SIPP measures the impact of layoffs on the economic well-being of middle-income families.
  - The fluctuations in labor force participation.
  - The effect on savings and real assets as they try to maintain their standard of living.
  - The effectiveness of unemployment payments to the family's well-being.
  - The effect on educational attainment of family members.
  - The effect on child care arrangements during times of unemployment.
  
- ▶ SIPP measures the changes in family composition and the impact on the economic well-being of the family, after the loss of the main wage earner through death or divorce.

## MIDDLE INCOME RESPONDENTS

- ▶ SIPP measures the impact of layoffs on the economic well-being of middle-income families.
  - The fluctuations in labor force participation.
  - The effect on savings and real assets as people try to maintain their standard of living.
  - The effect on health insurance coverage, especially COBRAs. A COBRA is a requirement of the Omnibus Budget Reconciliation Act of 1986. It allows certain workers and their families the ability to retain health insurance benefits by paying the full cost of the coverage for a period of up to 36 months after a dependent reaches a certain age or up to 18 months after a worker is terminated from employment.
  - The effectiveness of unemployment payments to the family's well-being.
  - The effect on educational attainment of family members.
  - The effect on child care arrangements during times of unemployment.
  
- ▶ SIPP measures the effectiveness of government programs to meet the needs of people in need even for short periods, such as:
  - The effectiveness of assistance programs to meet the short term needs of people temporarily unemployed.
  - The effectiveness of programs to reach the intended population.
  - The impact on health care insurance participation during periods of unemployment.
  
- ▶ SIPP measures changes in the socioeconomic patterns of the nation's work force.
  - Changes in the child care arrangements and work schedules when both parents are in the labor force.
  - Changes in work habits caused by legislative initiatives such as the Family and Medical Leave Act.
  - Changes in labor force participation as women leave the work force to have children and the duration of non-participation in the labor force.
  - The job status of women/men as they reenter the work force after taking care of a baby or sick family member.
  - Changes in family composition and the impact on the economic well-being of the family, after the loss of the main wage earner through death or divorce.
  
- ▶ SIPP has been used to measure the impact on the value and sufficiency of Social Security payments due to:
  - Changes in the cost of medical insurance, especially supplemental insurance.
  - Changes in the amount of income received and how people meet living expenses.

- ▶ SIPP measures the impact of changes in government tax policies on savings and assets.
  - Changes in IRA or 401(k) eligibility or limits.
  - Changes in the basic tax rates and exemptions.
  - Modification of tax credits for education.
  - Modification of tax deductions, such as changes in the deduction for mortgage interest or changes in personal exemptions.
  
- ▶ SIPP measures the impact of changes in health insurance programs.
  - Changes in the cost of insurance policies.
  - Changes in the composition of those covered.
  - Changes in coverage when a person changes jobs.
  
- ▶ SIPP measures the impact on educational attainment when the government modifies student loan programs and educational grants.
  
- ▶ SIPP measures the impact on the Nation's well-being as the population grows older, such as:
  - Changes in savings plans such as IRAs, 401(k)s, pensions plans, etc as the baby boomers reach retirement.
  - Changes in real assets such as real estate, mutual funds, and stocks as the population ages.
  - Changes in health insurance coverage, especially shifts in types of coverage over time from group or individual policies to HMOs.