


## With whom am I speaking?

Enter line number



| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | (Press END to move to the next unanswered item/ ) <br> 1. Continue <br> 2. Skip notes <br> 3. Ready to transmit <br> 4. Quit <br> 5. Non-interview | <5> [IF LSTOUT $=204$ or 203 then goto CK2_START] [ELSEIF OUTCOME = 201 goto CK3_START] [ELSE goto NONTYP (in the coverage section)] |
| SHOSTAT |  | SHOSTAT | (This household was not in sample last quarter. / ) | $<1>$[ELSE goto SHOW_NOTES] |
|  |  | INTERVIEW NUMBER PREVIOUS OUTCOME DESCRIPTION  <br> $(1 /)$ (1st month outcome \#) (outcode description) <br> $(2 /)$ (2nd month outcome \#) (Outcome description) <br> $(3 /)$ (3rd month outcome \# ) (Outcome description) <br> $(4 /)$ (4th month outcome \#) (Outcome description) |  |
|  |  | ```( BC NAME: (name)/ ) (BC TITLE: (title) / ) ^BC_Phon_Fill (BC ADDRESS: (Street address) / ) ^BC_Add2_Fill (BC CITY: (city) / ), (BC STATE: (State) / ) (BC ZIP CODE: (zipcode) / ) (BC OBSERVATION: (Yes/No) / )``` <br> 1. Enter 1 to Continue |  |
| SHOWROS |  |  | SHOWROS | STATUS OF HOUSEHOLD COMPOSITION | <1> [goto SHOW_NOTES] |
|  |  | Resp. LN Name Member Relationship CU  Sex Age  <br> (X/ ) (Line \#) $\wedge$ Name (Yes/No) (Relationship) ${ }^{\wedge} \mathrm{Cu}(1 / 2)$ (Age) |  |  |  |
|  |  | 1. Enter 1 to Continue |  |  |  |
|  | SHOW_NOTES |  | SHOW_NOTES | - INFORMATION FROM PREVIOUS QUARTERS INTERVIEW | <1> [goto GENINTRO] |
|  |  |  | PRECHARTS: Press Shift-F8 to view pre-charts <br> BEST TIME TO CALL: ^Besttime1 (best time specify) |  |  |
|  |  |  | $\begin{aligned} & \text { SUNDAY INTERVIEW: (No Sunday Interview/Sunday interview okay) } \\ & \text { Language Spoken Last Quarter: (English/Spanish/(specify) ) } \end{aligned}$ |  |  |


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|  |  |  | Use CNTRL-F7 to view case level notes |  |
|  |  |  | 1. Enter 1 to Continue |  |
| FRONT | GENINTRO | GENINTRO | - Do not read as worded below | <1> [goto INTROB] <br> <2> [goto GIVE_LETTER] |
|  |  |  | o Identify yourself - show I.D. <br> o (Ask to speak to: (name) / Ask for eligible respondent) | <3> [goto NONTYP (in the coverage section)] |
|  |  |  | If unavailable use Shift-F1 for HH roster. |  |
|  |  |  | - (Ask to speak to: (name) / Ask for eligible respondent)2 |  |
|  |  |  | o Introduce survey (Ask to speak to: (name) / Ask for eligible respondent)3 |  |
|  |  |  | o The Household address is: <br> (House \#) (House \#)suf (Street name) <br> (Unit Designation) |  |
|  |  |  | o Read if necessary <br> I am (your name) from the U.S. Census Bureau. Here is my identification card. We are conducting a Consumer Expenditure Survey for the Bureau of Labor Statistics. I have some questions I would like to ask you. |  |



## Allow time to read



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|  |  |  | 4. Other Outcome <br> 5. Wrong address <br> 6. Inconvenient time | ```[else goto NONTYP (in the coverage section)] <2,4> [goto VERIFY_INFO, in the back section] <5> [goto DONE (In the back section)] <6> [goto APPTOTH, in the back section]``` |
| FRONT | REPLACE_HH | REPLACE_HH | Is this a Replacement Household? <br> 1. Yes <br> 2. No | $<1>$ [goto REPLACE_VER] <br> $<2>$ [goto VERADD] |
| FRONT | REPLACE_VER | REPLACE_VER | A replacement household means that there are no members of the original household living at this address. Are you sure that this is a replacement household? <br> 1. Yes <br> 2. No | ```<1> [IF RT8500.TOTALCU = 1 goto ONE_CU] [ELSE goto REPLACE_VER2] <2> [goto CK_REPLACEVER]``` |
| FRONT | REPLACE_VER2 | REPLACE_VER2 | - Has a replacement case already been created/spawned for this address? <br> If unsure, back up to the start screen and Quit out of the instrument so you can check case management. <br> 1. Yes <br> 2. No | ```<1> [goto DONE] <2> [IF RT8500.TOTALCU = CU_COUNT then goto MULTI_CU3] [ELSE goto MULTI_CU4]``` |
| FRONT | ONE_CU | ONE_CU | A replacement household Case will be spawned. You will need to exit this case and pull up the new Case in order to interview the replacement household. <br> The case you are currently in will automatically become a type $C$. <br> 1. Enter 1 to Continue | <1> [goto DONE] |
| FRONT | MULTI_CU3 | MULTI_CU3 | A Replacement Household Case will be spawned. You will need to exit this case and pull up the New Case in order to interview the replacement household. <br> This case is part of a Multi-CU Address. <br> The case you are currently in will automatically become a type C, | <1> [goto DONE] |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | But you MUST manually Type C all other Cases. (There are [Fill: RT8500.TOTALCU] cases that must be Type C'd) |  |
| - |  |  | 1. Enter 1 to Continue |  |
| FRONT | MULTI_CU4 | MULTI_CU4 | - ALL cases are not located on your laptop. | $<1>$ [goto MULTI_CU6] <br> $<2>$ [goto DONE] |
|  |  |  | 1. Continue with replacement <br> 2. Quit without making replacement |  |
| FRONT | MULTI_CU6 | MULTI_CU6 | A Replacement Household Case will be spawned. You will need to exit this case and pull up the New Case in order to interview the replacement household. <br> This case is part of a Multi-CU Address. <br> All the associated Cu's are NOT on your laptop. <br> The case you are currently in will automatically become a type C, but you MUST manually Type C all other cases. <br> There are (Total CU's for this address) cases that must be Type C'd, but you only have (Cu \# for this address on this laptop) on your laptop. <br> You must alert the other FR that he/she needs to Type C the cases. <br> 1. Enter 1 to Continue | <1> [goto DONE] |
| FRONT | VERADD | VERADD | (* Confirm address information (Only ask if necessary) ) <br> I have your address listed as READ ADDRESS BELOW. Is that your exact address? <br> (House \#) (House \#)SUF (Street Name) (Unit Designation) <br> (City), (State) (Zipcode) <br> Phy des: (Physical Description) <br> GQ unit: (GQ Unit Description) Non-City: (Non-city address) <br> Building: (Building Name) | $<1>$ [goto MAILAD] <br> $<2>$ [goto NADDST1] <br> $<3$, R> [goto DONE] |
|  |  |  | 1. Yes, address is EXACTLY CORRECT as listed. <br> 2. Address is MOSTLY CORRECT, needs minor changes. <br> 3. INCORRECT ADDRESS |  |

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| :---: | :---: | :---: | :---: | :---: |
| FRONT | NADDST1 | NADDST1 | Enter corrections for House Number or press ENTER for Same/No Change. <br> (House \#) (House \#)SUF (Street Name) (Unit Designation) <br> (City), (State) (Zipcode) <br> Phy des: (Physical Description) <br> GQ unit: (GQ Unit Description) <br> Non-City: (Non-city address) <br> Building: (Building Name) | <10 Characters, empty> [goto NADDST2] |
| FRONT | NADDST2 | NADDST2 | Enter corrections for House \# Suffix or Press ENTER for Same/No Change <br> (House \#) (House \#)SUF (Street Name) (Unit Designation) (City), (State) (Zipcode) <br> Phy des: (Physical Description) <br> GQ unit: (GQ Unit Description) <br> Non-City: (Non-city address) <br> Building: (Building Name) | <3 characters, Empty> [goto NADDST3] |
| FRONT | NADDST3 | NADDST3 | Enter corrections for Street Name or Press ENTER for Same/No Change <br> (House \#) (House \#)SUF (Street Name) (Unit Designation) <br> (City), (State) (Zipcode) <br> Phy des: (Physical Description) <br> GQ unit: (GQ Unit Description) <br> Non-City: (Non-city address) <br> Building: (Building Name) | <49 Characters, Empty> [goto NADDST4] |
| FRONT | NADDST4 | NADDST4 | Enter corrections for Unit Designation or Press ENTER for Same/No Change <br> (House \#) (House \#)SUF (Street Name) (Unit Designation) <br> (City), (State) (Zipcode) <br> Phy des: (Physical Description) <br> GQ unit: (GQ Unit Description) <br> Non-City: (Non-city address) <br> Building: (Building Name) | $\begin{aligned} & \text { <20 Characters, Empty> [If FRAME }=3 \text { or RT25.GQINFO } \\ & =1 \text { goto NADDST5] } \\ & \text { [else goto NADDST6] } \end{aligned}$ |
| FRONT | NADDST5 | NADDST5 | 4 Enter corrections for Group Quarters Unit Description or Press ENTER for Sam | <43 characters, empty> [goto NADDST6] |



| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | ```(House \#) (House \#)SUF (Street Name) (Unit Designation) (City), (State) (Zipcode) Phy des: (Physical Description) GQ unit: (GQ Unit Description) Non-City: (Non-city address) Building: (Building Name)``` |  |
| FRONT | NADDPHYS | NADDPHYS | Enter corrections for Physical Description or Press ENTER for Same/No Change <br> (House \#) (House \#)SUF (Street Name) (Unit Designation) <br> (City), (State) (Zipcode) <br> Phy des: (Physical Description) <br> GQ unit: (GQ Unit Description) <br> Non-City: (Non-city address) <br> Building: (Building Name) | <99 characters, Empty> [goto NADDCT] |
| FRONT | NADDCT | NADDCT | Enter corrections for City or Press ENTER for Same/No Change <br> (House \#) (House \#)SUF (Street Name) (Unit Designation) <br> (City), (State) (Zipcode) <br> Phy des: (Physical Description) <br> GQ unit: (GQ Unit Description) <br> Non-City: (Non-city address) <br> Building: (Building Name) | <28 Characters> [goto NADDST] |
| FRONT | NADDST | NADDST | ? [F1] <br> Enter corrections for State or Press ENTER for Same/No Change <br> (House \#) (House \#)SUF (Street Name) (Unit Designation) <br> (City), (State) (Zipcode) <br> Phy des: (Physical Description) <br> GQ unit: (GQ Unit Description) <br> Non-City: (Non-city address) <br> Building: (Building Name) | <2 digit state code, D,R> [goto NADDZP] |
| FRONT | NADDZP | NADDZP | Enter corrections for Zipcode or Press ENTER for Same/No Change <br> (House \#) (House \#)SUF (Street Name) (Unit Designation) <br> (City), (State) (Zipcode) <br> Phy des: (Physical Description) <br> GQ unit: (GQ Unit Description) <br> Non-City: (Non-city address) <br> Building: (Building Name) | ```<9 characters> [If entry It 5 digits then goto CK_NADDZP] [else goto NADDBUIL] <D,R> [goto NADDBUIL]``` |
| FRONT | NADDBUIL | NADDBUIL | * Enter corrections for Building Name or Press ENTER for Same/No Change | <60 characters, empty> [goto MAILAD] |



| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
| FRONT | NMAILST4 | NMAILST4 | Enter change to Mailing address - Unit Designation or Press ENTER for Same/No Change | <20 characters, empty> [If FRAME = 3 or RT25.GQUNITINFO $=1$ goto NMAILST5] [else goto NMAILST6]] |
| FRONT | NMAILST5 | NMAILST5 | - Enter change to Mailing address - GQ Unit Description or Press ENTER for Same/No Change | <43 characters, empty> [goto NMAILST6] |
| FRONT | NMAILST6 | NMAILST6 | Enter change to Mailing address - Non-City Style Address or Press ENTER for Same/No Change | <27 characters, empty> [If no entry in NMAILST1 and NMAILST6 then goto CK_NMAILST6] <br> [Else goto NMAILCT] |
| FRONT | NMAILCT | NMAILCT | Enter change to Mailing address - City or Press ENTER for Same/No Change | <28 Characters> [goto NMAILST] |
| FRONT | NMAILST | NMAILST | ? [F1] <br> Enter change to Mailing address -State or Press ENTER for Same/No Change | <2 digit code, D,R> [goto NMAILZP1] |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  |  |  |
| FRONT | NMAILZP1 | NMAILZP1 | Enter change to Mailing address - Zipcode or Press ENTER for Same/No Change | <9 digits,D,R> [If entry It 5 digits goto CK_NMAILZP1] [else goto PHONENUMBER] |
| FRONT | PHONENUMBER | PHONENUMBER | Ask or verify, if necessary. <br> What is your telephone number? <br> Enter phone number or 0 for None | ```<15 characters> [If PHONENUMBER It 10 digits goto CK_PHONENUMBER] [else goto PHONENUMBER2] <0,D,R> [goto PHONENUMBER2]``` |
| FRONT | PHONENUMBER2 | PHONENUMBER2 | Ask or verify, if necessary. <br> Do you have another phone number where I can reach you? <br> Enter phone number or 0 for None | ```\(<15\) characters \(>\) [If PHONENUMBER It 10 digits then goto CK_PHONENUMBER2] [else goto LASTTEMP] <0,D,R> [goto LASTTEMP]``` |
| COVERAGE | NONTYP | NONTYP | What type of non-interview do you have? <br> Type A = No one home, Temporarily absent, or refusal <br> Type $B=$ Vacant, under construction, occupied by persons with URE <br> Type C = Demolished, house moved, merged, condemned, located on base, CU moved | $<1>$ [goto TYPEA] <br> $<2>$ [goto TYPEB] <br> $<3>$ [goto TYPEC] |

## 1. TYPE A <br> 2. TYPE B

3. TYPE C

| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 1. No one home <br> 2. Temporarily Absent <br> 3. Refused <br> 4. Other Type A -specify | ```RT2501.PMITSTA = P goto YRBLT] [ELSEIF (RT2501.FRAME \(=1,2\) or 4) AND (RT2501.MULTUNIT \(=0\) (zero) or blank) AND (RT2501.GQINAREA \(=0\) (zero) or blank) AND NEWUNIT = blank goto BUILD] [ELSEIF RT2501.URRAL \(=\mathrm{R}\) and (RT2501.FRAME ne 3 or RT2501.GQTYPE \(=901\) or 903) AND (REPLACE \(=1\) or ( (INTNMBR = 1 or NEWCU = 1) AND NEWUNIT ne S) goto FM_SALES] [ELSEIF ( (INTNMBR = 1 or NEWCU =1) and NEWUNIT ne S) goto GQ_UNIT] [ELSE goto BUILD] <3> [goto REF_RSN] <4> [goto TYPEASP]``` |
| COVERAGE | TYPEASP | TYPEASP | - Specify other TYPE A | $<30$ characters $>$ [IF REPLACE ne 1 AND ( (INTNMBR = 1 or NEWCU = 1) AND NEWUNIT ne S ) AND RT2501.FRAME = 1 AND RT2501.PMITSTA $=P$ goto YRBLT] <br> [ELSEIF (RT2501.FRAME $=1,2$ or 4) AND <br> (RT2501.MULTUNIT $=0$ (zero) or blank) AND <br> (RT2501.GQINAREA $=0$ or blank) AND NEWUNIT = blank goto BUILD] <br> [IF RT2501.URRAL $=$ R and (RT2501.FRAME ne 3 or RT2501.GQTYPE $=901$ or 902) AND (REPLACE $=1$ or ( (INTNMBR = 1 or NEWCU = 1) AND NEWUNIT ne S) goto FM_SALES] <br> [If ( (INTNMBR = 1 or NEWCU = 1) and NEWUNIT ne S) goto GQ_UNIT] <br> [ELSE goto BUILD] |
| COVERAGE | REF_RSN | REF_RSN | Enter type of refusal <br> 1. Hostile Respondent <br> 2. Time Related Excuses <br> 3. Language Problems <br> 4. Other Refusal - specify | <1-3> [IF REPLACE ne 1 AND ( (INTNMBR = 1 or NEWCU = 1) AND NEWUNIT ne S ) AND RT2501.FRAME = 1 AND RT2501.PMITSTA $=\mathrm{P}$ goto YRBLT] <br> [ELSEIF (RT2501.FRAME $=1,2$ or 4) AND <br> (RT2501.MULTUNIT $=0$ (zero) or blank) AND <br> (RT2501.GQINAREA $=0$ (zero) or blank) AND NEWUNIT = blank goto BUILD] <br> [ELSEIF RT2501.URRAL $=R$ and <br> (RT2501.FRAME ne 3 or RT2501.GQTYPE $=901$ or 902) <br> AND (REPLACE = 1 or ( (INTNMBR = 1 or NEWCU = 1) <br> AND NEWUNIT ne S) goto FM_SALES] <br> [ELSEIF ( (INTNMBR = 1 or NEWCU =1) and <br> NEWUNIT ne S) goto GQ_UNIT] <br> [ELSE goto BUILD] |


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|  |  |  |  | <4> [goto REASON_S] |
| COVERAGE | REASON_S | REASON_S | - Specify type of refusal | <45 characters> [IF REPLACE ne 1 AND ( (INTNMBR = 1 or NEWCU= 1) AND NEWUNIT ne S ) AND RT2501.FRAME $=1$ AND RT2501.PMITSTA $=\mathrm{P}$ goto YRBLT] <br> [ELSEIF (RT2501.FRAME $=1$, 2 or 4) AND <br> (RT2501.MULTUNIT $=0$ (zero) or blank) AND <br> (RT2501.GQINAREA $=0$ (zero) or blank) AND <br> NEWUNIT = blank goto BUILD] <br> [ELSEIF RT2501.URRAL = R and <br> (RT2501.FRAME ne 3 or RT2501.GQTYPE = 901 or 902) <br> AND (REPLACE = 1 or ( (INTNMBR = 1 or NEWCU =1) <br> AND NEWUNIT ne S) goto FM_SALES] <br> [ELSEIF ( (INTNMBR = 1 or NEWCU = 1) and NEWUNIT ne S) goto GQ_UNIT] <br> [ELSE goto BUILD] |
| COVERAGE | TYPEB | TYPEB | Enter TYPE B noninterview <br> 1. Vacant (for rent) <br> 2. Vacant (for sale) <br> 3. Vacant (other) <br> 4. Occupied by persons with URE <br> 5. Under construction, not ready <br> 6. All persons under 16 <br> 7. Unfit or to be demolished <br> 8. Unoccupied tent or trailer site <br> 9. Permit granted, construction not started <br> 10. Other Type B -specify | ```\(<1,2,4-7>\) [IF REPLACE ne 1 AND ( (INTNMBR = 1 or NEWCU = 1) AND NEWUNIT ne S )AND RT2501.FRAME \(=1\) AND RT2501.PMITSTA \(=P\) goto YRBLT] [ELSEIF (RT2501.FRAME \(=1,2\) or 4) AND (RT2501.MULTUNIT \(=0\) (zero) or blank) AND (RT2501.GQINAREA \(=0\) (zero) or blank) AND NEWUNIT \(=\) blank goto BUILD] [ELSEIF ( (INTNMBR = 1 or NEWCU =1) and NEWUNIT ne S) goto GQ_UNIT] [ELSE goto BUILD] <3> [goto VACANT_S] <8,9> [goto BUILD] <10> [goto TYPEB_SP]``` |
| COVERAGE | TYPEB_SP | TYPEB_SP | - Specify other TYPE B | <45 characters> [IF REPLACE ne 1 AND ( (INTNMBR = 1 or NEWCU = 1) AND NEWUNIT ne S ) AND RT2501.FRAME = 1 AND RT2501.PMITSTA = P goto YRBLT] <br> [ELSEIF (RT2501.FRAME $=1,2$ or 4) AND <br> (RT2501.MULTUNIT $=0$ (zero) or blank) AND <br> (RT2501.GQINAREA $=0$ (zero) or blank) AND NEWUNIT = blank goto BUILD] <br> [ELSEIF ( (INTNMBR = 1 or NEWCU = 1) and <br> NEWUNIT ne S) goto GQ_UNIT] <br> [ELSE goto BUILD] |
| COVERAGE | VACANT_S | VACANT_S | - Specify type of vacant | <45 characters> [IF REPLACE ne 1 AND ( (INTNMBR = 1 or NEWCU=1) AND NEWUNIT ne S ) AND RT2501.FRAME = 1 AND RT2501.PMITSTA = P goto YRBLT] <br> [ELSEIF (RT2501.FRAME $=1,2$ or 4) AND |


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|  |  |  |  | (RT2501.MULTUNIT = 0 (zero) or blank) AND (RT2501.GQINAREA = 0 (zero) or blank) AND NEWUNIT = blank goto BUILD] <br> [ELSEIF ( (INTNMBR = 1 or NEWCU = 1) and NEWUNIT ne S) goto GQ_UNIT] <br> [ELSE goto BUILD] |
| COVERAGE | TYPEC | TYPEC | - Enter TYPE C noninterview | <1,2> [goto BYOBS] |
|  |  |  | 1. Demolished <br> 2. House or Mobile Home moved | <3,7,10,11,12> [goto END_COVERAGE] |
|  |  |  | 3. Converted to permanent nonresidential use | <4-6,8-9> [IF REPLACE ne 1 AND ( (INTNMBR = 1 or |
|  |  |  | 4. Merged with units in the same structure | NEWCU = 1) AND NEWUNIT ne S ) AND RT2501.FRAME = |
|  |  |  | 5. Condemned <br> 6. Located on military base (post) | 1 AND RT500.PMITSTA $=\mathrm{P}$ goto YRBLT] <br> [ELSEIF RT2501.FRAME $=1,2$ or 4) AND |
|  |  |  | 7. Unused serial \# on listing sheet | (RT2501.MULTUNIT $=0$ (zero) or blank) AND |
|  |  |  | 8. CU moved | (RT2501.GQINAREA $=0$ (zero) or blank) AND NEWUNIT = |
|  |  |  | 9. CU merged with another CE CU within same address 10. Spawned in error | blank goto BUILD] <br> [ELSE goto BYOBS] |
|  |  |  | 11. Removed during subsampling <br> 12. Unit already had a chance of selection <br> 13. Other type C - specify | <13> [goto TYPEC_SP] |
| COVERAGE | TYPEC_SP | TYPEC_SP | - Specify other TYPE C | ```<45 characters> [IF REPLACE ne 1 AND ( (INTNMBR = 1 or NEWCU = 1) AND NEWUNIT ne S ) AND RT2501.FRAME= 1 AND RT2501.PMITSTA = P goto YRBLT]``` |
|  |  |  |  | [ELSEIF (RT2501.FRAME $=1,2$ or 4) AND <br> (RT2501.MULTUNIT $=0$ (zero) or blank) AND <br> (RT2501.GQINAREA $=0$ (zero) or blank) AND NEWUNIT $=$ blank goto BUILD] <br> [ELSE goto BYOBS] |
| COVERAGE | YRBLT | YRBLT | Was this structure built before April 2000? | <1,3,D> [IF RT2501.MUTLUNIT = 0 or blank and GQINAREA $=0$ goto BUILD] <br> [ELSEIF NONTYPE $=3$ goto BYOBS] <br> [ELSEIF TYPEB = 1-7, 10 goto GQ_UNIT] |
|  |  |  | 1. Yes <br> 2. No | [ELSEIF RT2501.URRAL $=$ R and (RT2501.FRAME ne 3 or RT2501.GQTYPE $=901$ or 902) |
|  |  |  | 3. Not asked (address is a Mobile Home, Trailer, Tent, or other unit not in a structure, or the unit is in a group quarters.) | AND ( (INTNMBR = 1 or NEWCU = 1) AND NEWUNIT ne <br> S) goto FM_SALES] <br> [ELSE goto BUILD] |
|  |  |  |  | <2> [goto END_COVERAGE] |
| COVERAGE | BUILD | BUILD | Are there any occupied or vacant living quarters besides your own in this building? <br> 1. Yes | <1> [IF NEWUNIT ne A, E, P or S goto TABX_INTRO] <br> [ELSE goto NO_TABX] |


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|  |  |  | 2. No | <2> [IF NONTYPE $=3$ goto BYOBS] <br> [ELSEIF TYPEB $=1-7,10$ And (REPLACE $=1$ or ((INTNMBR $=1$ or NEWCU $=1$ ) and NEWUNIT ne S) goto GQ_UNIT] <br> [ELSEIF RT2501.URRAL = R and (RT2501.FRAME ne 3 or RT2501.GQTYPE = 901 or 902) AND (REPLACE $=1$ or ( (INTNMBR $=1$ or NEWCU =1) AND NEWUNIT ne S) goto FM_SALES] <br> [ELSEIF (INTROB = 1 or NONTYP =1) and (REPLACE $=1$ or ( $($ INTNMBR $=1$ or NEWCU =1) and NEWUNIT ne S) goto GQ_UNIT] <br> [ELSEIF TYPEB = 1-7, 10 or NONTYP =1) goto BYOBS] <br> [ELSE goto END_COVERAGE] |
| COVERAGE | TABX_INTRO | TABX_INTRO |  | <1> [goto BTabX.XHNO] |
|  |  |  | You are about to begin asking questions about one or more additional living arrangements at this location to determine if they qualify as EXTRA UNITS!!! <br> If you have accidentally reached this screen, PRESS "UP ARROW" to back up to the previous screen and correct an earlier entry. |  |
|  |  |  | 1. Enter 1 to Continue |  |
| COVERAGE | NO_TABX | NO_TABX | ${ }^{\wedge}$ Notabx <br> 1. Enter 1 to Continue | <1> [IF NONTYPE = 3 goto BYOBS] <br> [ELSEIF TYPEB = 1-7, 10 goto GQ_UNIT] <br> [ELSEIF RT2501.URRAL $=\mathrm{R}$ and <br> (RT2501.FRAME ne 3 or RT2501.GQTYPE $=901$ or 902) <br> AND (REPLACE $=1$ or $(($ INTNMBR $=1$ or NEWCU $=1)$ <br> AND NEWUNIT ne S) goto FM_SALES] <br> [ELSE goto BYOBS] |
| COVERAGE | XHNO | XHNO | What is the exact address of this other living quarters? <br> - Enter House number: <br> - Press Enter if no change is needed <br> (House \#) (House \#)SUF (Street Name) <br> (Unit Designation) <br> (City), (State)^ ZIP5-ZIP4 <br> Non-city: (Non-city address) <br> Building: (Building Name) | <10 characters> [goto XHNOSUF] |

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
| COVERAGE | XHNOSUF | XHNOSUF | Enter House number suffix, if applicable (Press Enter if no change needed.) ```(House #)(House #)SUF (Street Name) (Unit Designation) (City), (State) (Zipcode) 5-ZIP4 Non-city: (Non-city address) Building: (Building Name)``` | <3 characters, Empty> [goto XSTRNAME] |
| COVERAGE | XSTRNAME | XSTRNAME | Enter Street name: <br> (Press Enter if no change needed.) ```(House #) (House #)SUF (Street Name) (Unit Designation) (City),(State)^ ZIP5-ZIP4 Non-city: (Non-city address) Building: (Building Name)``` | <49 characters> [goto XUNITDES] |
| COVERAGE | XUNITDES | XUNITDES | Enter Unit designation: <br> (Press Enter if no change needed.) <br> (House \#) (House \#)SUF (Street Name) <br> (Unit Designation) <br> (City), (State) ^ ZIP5-ZIP4 <br> Non-city: (Non-city address) <br> Building: (Building Name) | <20 characters> [goto XPO] |
| COVERAGE | XPO | XPO | Enter Town or city name: <br> (Press Enter if no change needed.) <br> (House \#) (House \#)SUF (Street Name) <br> (Unit Designation) <br> (City), (State) ^ ZIP5-ZIP4 <br> Non-city: (Non-city address) <br> Building: (Building Name) | <28 characters> [goto XST] |
| COVERAGE | XST | XST | ? [F1] <br> Enter State: <br> (Press Enter if no change needed.) <br> (House \#) (House \#)SUF (Street Name) <br> (Unit Designation) <br> (City), (State) ^ ZIP5-ZIP4 <br> Non-city: (Non-city address) <br> Building: (Building Name) | <2 digit state code> [goto XZIP] |
| COVERAGE | XZIP | XZIP | Enter Zipcode: <br> (Press Enter if no change needed.) | $<9$ digits> [IF entry is less than 5 digits goto CK_XZIP] <br>  $[$ ELSE goto XNONCITY] |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | (House \#) (House \#)SUF (Street Name) (Unit Designation) (City), (State) ^ ZIP5-ZIP4 <br> Non-city: (Non-city address) <br> Building: (Building Name) | <D,R> [goto XNONCITY] |
| COVERAGE | XNONCITY | XNONCITY | Enter Non city style address: <br> (Press Enter if no change needed.) <br> (House \#) (House \#)SUF (Street Name) <br> (Unit Designation) <br> (City), (State) ^ ZIP5-ZIP4 <br> Non-city: (Non-city address) <br> Building: (Building Name) | <27 characters, empty> [goto XBLDGNAME] |
| COVERAGE | XBLDGNAME | XBLDGNAME | Enter Building name: <br> (Press Enter if no change needed.) <br> (House \#) (House \#)SUF (Street Name) <br> (Unit Designation) <br> (City), (State) ^ ZIP5-ZIP4 <br> Non-city: (Non-city address) <br> Building: (Building Name) | <60 characters, empty> [goto TABX_MORE] |
| COVERAGE | TABX_MORE | TABX_MORE | Are there any OTHER living quarters, either occupied or vacant, at this original address? <br> (House \#) (House \#)SUF (Street Name) <br> (Unit Designation) <br> (City), (State) ^ ZIP5-ZIP4 <br> Non-city: (Non-city address) <br> Building: (Building Name) <br> 1. Yes <br> 2. No | <1> [IF 26 addresses already entered then exit block and: if FRAME $=4$ goto BBEXTRA.TABX_A2 if FRAME $=1$ goto BBEXTRA.TABX_B1 else goto BBEXTRA.TABX_B2] <br> [ELSE go to XHNO for next address] <br> <2> [Exit block AND: <br> [IF FRAME $=4$ goto BBEXTRA.TABX_A2] [ELSEIF FRAME $=1$ goto BBEXTRA.TABX_B1] [ELSE goto BBEXTRA.TABX_B2] ] |
| COVERAGE | TABX_A2 | TABX_A2 | Is the address of the additional living quarters already listed? ```(House #) (House #)SUF (Street Name) (Unit Designation) (City), (State) (Zipcode) 5-ZIP4 Non-city: (Non-city address) Building: (Building Name)``` | $<1>$ [goto TABX_NO] <br> $<2>$ [goto TABX_B3] |

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| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 2. No |  |
| COVERAGE | TABX_B1 | TABX_B1 | Are the additional living quarters within the same space occupied by the original sample unit? <br> (House \#) (House \#)SUF (Street Name) <br> (Unit Designation) <br> (City), (State) (Zipcode) 5-ZIP4 <br> Non-city: (Non-city address) <br> Building: (Building Name) | $<1>$ [goto TABX_C1] <br> $<2>$ [goto TABX_NO] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| COVERAGE | TABX_B2 | TABX_B2 | Are the additional living quarters within the basic address (house number and street name) of the original sample unit? $\begin{aligned} & \text { (House \#) (House \#)SUF (Street Name) } \\ & \text { (Unit Designation) } \\ & \text { (City), (State) ^ ZIP5-ZIP4 } \\ & \text { Non-city: (Non-city address) } \\ & \text { Building: (Building Name) } \end{aligned}$ | $<1>$ [goto TABX_D] <br> $<2>$ [goto TABX_NO] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| COVERAGE | TABX_B3 | TABX_B3 | Are the additional living quarters within the same structure and within the same space as the sample unit? <br> (House \#) (House \#)SUF (Street Name) <br> (Unit Designation) <br> (City), (State) (Zipcode) 5-ZIP4 <br> Non-city: (Non-city address) <br> Building: (Building Name) | $\begin{array}{ll} \hline<1> & \text { [goto TABX_D] } \\ <2> & \text { [goto TABX_NO] } \end{array}$ |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |

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| 1. Enter 1 to Continue |  |  |  |
| :---: | :---: | :---: | :---: |
| COVERAGE TABX_FR | TABX_FR | - Interview the parent case. <br> - After interviewing the parent unit, you will receive instructions from you RO on what to do with the EXTRA units. <br> - You have identified (Total \# of spawns) extra units. <br> [Fill: extra unit addresses with House \#, house suffix, unit description and street name] | <1> [IF TOTSPAWN gt 26 goto CALLRO] <br> [ELSEIF NONTYPE $=3$ goto BYOBS] <br> [ELSEIF TYPEB $=1-7,10$ goto GQ_UNIT] <br> [ELSEIF RT2501.URRAL $=\mathrm{R}$ and <br> (RT2501.FRAME ne 3 or RT2501.GQTYPE = 901 or 902) <br> AND (REPLACE = 1 or $($ (INTNMBR $=1$ or NEWCU = 1) <br> AND NEWUNIT ne S) goto FM_SALES] <br> [ELSE goto BYOBS] |
| 1. Enter 1 to Continue |  |  |  |
| CALLRO | CALLRO | More than 26 EXTRA UNITS have been identified for this listed address. <br> 1. Call your office <br> 2. Tell your supervisor that you have more than 26 Extra Units for this address. | <1> [IF NONTYPE = 3 goto BYOBS] <br> [ELSEIF TYPEB = 1-7, 10 goto GQ_UNIT] <br> [ELSEIF RT2501.URRAL $=$ R and <br> (RT2501.FRAME ne 3 or RT2501.GQTYPE $=901$ or 902) <br> AND (REPLACE $=1$ or ( (INTNMBR = 1 or NEWCU =1) <br> AND NEWUNIT ne S) goto FM_SALES] <br> [ELSE goto BYOBS] |

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
| COVERAGE | FM_SALES | FM_SALES | During the past 12 months did sales of crops, livestock, and other farm products from this place amount to $\$ 1,000$ or more? | <1,2> [goto GQ_UNIT] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| COVERAGE | GQ_UNIT | GQ_UNIT | ¢ Indicate if the unit is: | <1> [goto HUTYPE] |
|  |  |  | 1. In a Group Quarters <br> 2. NOT in a Group Quarters | <2,D> [IF FRAME ne 3 goto DIRACC] [ELSE goto HUTYPE] |
| COVERAGE | DIRACC | DIRACC | Indicate if access to the household is: <br> 1. Direct <br> 2. Through another unit | $<1>$ [goto HUTYPE] <br> $<2, \mathrm{D}>$ [goto MERGUA] |
| COVERAGE | MERGUA | MERGUA | ? [F1] <br> Is this a merged unit? | $\begin{array}{ll} \hline<1, \mathrm{D>} & \text { [goto HUTYPE] } \\ <2> & \text { [goto CK_MERGUA] } \end{array}$ |
|  |  |  | 1. Merged <br> 2. Not Merged |  |
| COVERAGE | HUTYPE | HUTYPE | - Enter type of Housing Unit. |  |
|  |  |  | 1. House, apartment, flat <br> 2. HU in non-transient hotel, motel, etc <br> 3. HU permanent in transient hotel, motel, etc. <br> 4. HU in rooming house <br> 5. Mobile home or trailer with no permanent room added <br> 6. Mobile home or trailer with one or more permanent rooms added <br> 7. HU not specified above <br> 8. Quarters not HU in rooming or boarding house <br> 9. Students quarters in college dormitory <br> 10. Group Quarters unit not specified above | <7,10> [IF TYPEB ne 9 goto HUTYPESP] [ELSE goto UNISTRQ] |
| COVERAGE | HUTYPESP | HUTYPESP | Enter other type of housing unit | <45 characters> [goto UNISTRQ] |
| COVERAGE | UNISTRQ | UNISTRQ | - Ask if not apparent | $<1-10>$ [If NONTYPE $=2$ (type b) goto BYOBS] <br>  [All others goto END_COVERAGE] |

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | Press enter if no change is neededPREVIOUS ADDRESS:(Previous address) <br> (previous address - 2nd line) <br> (Previous city) $\quad$ (previous state)(previous zipcode) - (previous zipcode extension) |  |
| COVERAGE | CP1PO | CP1PO | Enter town or city <br> Press enter if no change is needed <br> PREVIOUS ADDRESS: (Previous address) <br> (previous address - 2nd line) <br> (Previous city) (previous state) (previous zipcode) - (previous zipcode extension) | <20 characters> [goto CP1ST] |
| COVERAGE | CP1ST | CP1ST | ? [F1] <br> Enter state <br> Press enter if no change is needed <br> PREVIOUS ADDRESS: (Previous address) (previous address - 2nd line) (Previous city) (previous state) (previous zipcode) - (previous zipcode extension) | <2 Digit State codes, D,R> [goto CP1ZIP9] |
|  | CP1ZIP9 | CP1ZIP9 | Enter zipcode <br> Press enter if no change is needed <br> PREVIOUS ADDRESS: (Previous address) <br> (previous address - 2nd line) <br> (Previous city) (previous state) (previous zipcode) - (previous zipcode extension) | ```<9 characters> [IF entry is It 5 digits goto CK_CP1ZIP9] [ELSE exit block and goto END_COVERAGE] <D,R> [exit block and goto END_COVERAGE]``` |
| COVERAGE | RACETYP | RACETYP | - The items below are required information for all TYPE A cases. <br> Race code <br> 1. White <br> 2. Black or African American <br> 3. American Indian or Alaska native <br> 4. Asian <br> 5. Native Hawaiian <br> 6. Guamanian or Chamorro <br> 7. Samoan <br> 8. Other Pacific Islander <br> 9. Other Specify <br> 10. Don't Know | <1-6,D> [goto HH_MEMQ] |

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
| COVERAGE | HH_MEMQ | HH_MEMQ | - The items below are required information for all TYPE A cases. | <1-30, D> [goto TENURE] |
|  |  |  | Number of household members: |  |
| COVERAGE | TENURE | TENURE | - The items below are required information for all TYPE A cases. | <1,2> [goto HHQSRCE] <br> <D,R> [goto BUILD_A] |


|  |  |  | 1. Owned <br> 2. Rented |  |
| :---: | :---: | :---: | :---: | :---: |
| COVERAGE | BUILD_A | BUILD_A | Which best describes this building? | <1-10> [goto HHQSRCE] |
|  |  |  | 1. Single family detached <br> 2. Townhouse - inner unit <br> 3. End row or end townhouse <br> 4. Duplex <br> 5. 3-plex or 4-plex <br> 6. Garden <br> 7. High-rise <br> 8. Apartment or flat <br> 9. Mobile home or trailer <br> 10. College dormitory |  |
| COVERAGE | HHQSRCE | HHQSRCE | What was the source of the information for the household characteristics? | <1-3> [IF TYPE A (outcome is 321-324) goto REF_SEX] <br> [ELSE goto END_COVERAGE] |
|  |  |  | Enter all that apply, separate with commas | <4> [goto HHQ_SP] |
|  |  |  | 1. Observation <br> 2. Neighbor <br> 3. Building Manager <br> 4. Other (Specify) |  |
| COVERAGE | HHQ_SPECIFY | HHQ_SPECIFY | - Specify other source of information | <30 characters> [IF Type A (outcome is 321-324) goto REF_SEX] <br> [ELSE goto END_COVERAGE] |
| COVERAGE | REF_SEX | REF_SEX | - Provide the characteristics of the individual who refused to particin | <1, 2, D> [goto REF_RACE] |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 1. Male <br> 2. Female |  |
| COVERAGE | REF_RACE | REF_RACE | Provide the characteristics of the individual who refused to participate. <br> Race of individual | <1-6, D> [goto REF_AGE] |
|  |  |  | 1. White <br> 2. Black or African American <br> 3. American Indian or Alaska native <br> 4. Asian <br> 5. Native Hawaiian <br> 6. Guamanian or Chamorro <br> 7. Samoan <br> 8. Other Pacific Islander <br> 9. Other Specify <br> 10. Don't Know |  |
| COVERAGE | REF_AGE | REF_AGE | Provide the characteristics of the individual who refused to participate. <br> Approximate age of individual | <1-4, D> [goto END_COVERAGE] |
|  |  |  | 1. Under 20 <br> 2. 21-50 <br> 3. 51-74 <br> 4. 75 or older |  |
| CONTROL CARD | STLLIV | STLLIV | I have listed . . . . READ NAMES Are all of these persons still living or staying here? stlliv cu fill ^PERSTATFILL | <1,2> [goto TUNIT1 Block - PERSTAT] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| CONTROL | PERSTAT | PERSTAT | - ^Perstat | <7,8,9,99> |

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| :---: | :---: | :---: | :---: | :---: |
| CARD |  |  |  |  |
|  |  |  | 7. Delete person <br> 8. CU member deceased <br> 9. Reinstate person <br> 99. Error - Person should not have been listed |  |
| $\begin{aligned} & \hline \text { CONTROL } \\ & \text { CARD } \end{aligned}$ | FNAME | FNAME | ${ }^{\wedge}$ Fname Enter 999 if no more persons. | <16 characters> [goto LNAME] <br> <999> [IF CU_CODE $=1-10, \mathrm{D}$ or R then goto <br> CK_FNAME] [ELSE exit block and goto CHECKS] |
| $\begin{aligned} & \hline \text { CONTROL } \\ & \text { CARD } \\ & \hline \end{aligned}$ | LNAME | LNAME | - Enter Last Name | <16 characters> <empty> [goto CU_CODE] |
| CONTROL CARD | CU_CODE | CU_CODE | Ask if not apparent <br> What is (your/NAME's) relationship to (you/the owner/renter/name of reference person)? <br> If this is the Reference Person, enter 1 <br> (The Reference person is one of the persons who owns or rents this home.) <br> 1. Reference person <br> 2. Spouse (Husband/Wife) <br> 3. Child or adopted child <br> 4. Grandchild <br> 5. In-Law <br> 6. Brother or Sister <br> 7. Mother or Father <br> 8. Other related person (Aunt, Uncle, etc.) <br> 9. Unrelated Person (Lodger, Lodger's spouse, foster child, etc.) <br> 10. Unmarried Partner |  |
| CONTROL CARD | SEX | SEX | Ask if not apparent Is ^NAME male or female? | ```<1,D,R,Empty> [goto AWAY_COL] <2> [IF SEX = sex of reference person then goto CK_SEX1] [ELSE goto AWAY_COL]``` |
|  |  |  | 1. Male <br> 2. Female |  |
| CONTROL CARD | AWAY_COL | AWAY_COL | Ask if not apparent <br> Is ^NAME living away at college? | ```<1> [IF CU_CODE = 1 goto CK_AWAYCOL] [ELSE goto HH_MEM] <2,D,R,EMPTY> [goto HH_MEM]``` |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| CONTROL CARD | HH_MEM | HH_MEM | Does ^NAME usually live here? <br> - Probe if usual place of residence is elsewhere. | $<1$, D, R,empty $>$ [goto next line of grid] <br> $<2>$ $[$ IF CU_CODE $=2$ goto CK_HHMEM] <br>  $[$ ELSE goto next line of grid] $]$ |


| $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: |
| CONTROL CARD | HHRESP | HHRESP | - Ask if necessary | <1-30,95> [IF HHRESP gt NROSIZE, goto CK_HHRESP] [ELSEIF (MEMBSTAT[HHRESP] = 1 AND |
|  |  |  | With whom am I speaking? | PERSTAT[HHRESP] ne 9) OR (MEMBSTAT[HHRESP] = 5) or (PERSTAT[HHRESP] $=78$ or 99) OR |
|  |  |  | Enter line number | (HH_MEM[HHRESP] $=2$ or blank) goto CK_HHRESP2] |
|  |  |  |  | [ELSEIF ( (INTNMBR = 1 or NEWCU = 1) AND |
|  |  |  |  | NEWUNIT ne 5) OR REPLACE = 1, goto MCHILD] [ELSE goto NEWLIV] |

1. NAME[1]
2. NAME[2]
3. NAME[3]
4. NAME[4]
5. NAME[5]
6. NAME[6]
7. NAME[7]
8. NAME[8]
9. NAME[9]
10. NAME[10]
11. NAME[11]
12. NAME[12]
13. NAME[13]
14. NAME[14
15. NAME[15
16. NAME[16]
17. NAME[17]
18. NAME[18]
19. NAME[19]
20. NAME[20]
21. NAME[21]
22. NAME[22]
23. NAME[23]

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| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 24. NAME[24] <br> 25. NAME[25] <br> 26. NAME[26] <br> 27. NAME[27] <br> 28. NAME[28] <br> 29. NAME[29] <br> 30. NAME[30] <br> 95. Proxy Respondent |  |
| $\begin{aligned} & \hline \text { CONTROL } \\ & \text { CARD } \end{aligned}$ | MCHILD | MCHILD | I have listed ... READ NAMES Have I missed any babies or small children? <br> ^PERSTATFILL | $<1>$ [go back to where FNAME = 999] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto MAWAY] |
|  |  |  | 1. Yes <br> 2. No |  |
| $\begin{aligned} & \hline \text { CONTROL } \\ & \text { CARD } \end{aligned}$ | MAWAY | MAWAY | Have I missed anyone who usually lives here but is away now - traveling, at school, or in a hospital? ^PERSTATFILL | $<1>$ [go back to where FNAME $=999$ ] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto MLODGE] |
|  |  |  | 1. Yes <br> 2. No |  |
| $\begin{aligned} & \hline \text { CONTROL } \\ & \text { CARD } \end{aligned}$ | MLODGE | MLODGE | Have I missed any lodgers, boarders, or persons you employ who live here? <br> ^PERSTATFILL | $<1>$ [go back to where FNAME $=999$ ] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto MELSE] |
|  |  |  | 1. Yes <br> 2. No |  |
| CONTROL CARD | MELSE | MELSE | Have I missed anyone else staying here? ^PERSTATFILL | $<1>$ [go back to where FNAME $=999$ ] <br> $<2, \mathrm{D}, \mathrm{R}>$ [CK_SUBFAMILY] |
| $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |  |  |  |
| CONTROL CARD | NEWLIV | NEWLIV | Is anyone else living or staying here, including newborn babies? ^PERSTATFILL | <1>  <br> $<2>$ [go back to where FNAME $=999]$ <br> [goto BSUBFamily Block]  |
|  |  |  | 1. Yes, add new person 2. No |  |
| CONTROL CARD | SUBFAM1 | SUBFAM1 | Earlier you said that ^NAME was not related to (Name of reference person). <br> Is ^NAME related to anyone else in this household? | $<1>$ [goto SUBFAM2] <br> $<2>$ [goto SUBFAM1 for next unassigned non-rel] <br>  [if no more non-rels, goto SET_SUBFAMS] |


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| :---: | :---: | :---: | :---: | :---: |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2 No } \end{aligned}$ |  |
|  | SUBFAM2 | SUBFAM2 | Who is ^NAME related to? <br> - PROBE: Anyone else? | <1-30> [If SUBFAM2 gt NROSIZE then goto CK_SUBFAM2] <br> [else goto SUBFAM, for next unassigned non-rel] [If no more non-rels, goto SET_SUBFAMS] |
|  |  |  | 1. ${ }^{\wedge}$ NAME[1] <br> 2. ^NAME[2] <br> 3. ^NAME[3] <br> 4. ^NAME[4] <br> 5. ^NAME[5] <br> 6. ^NAME[6] <br> 7. ^NAME[7] <br> 8. ^NAME[8] <br> 9. ^NAME[9] <br> 10. ^NAME[10] <br> 11. ^NAME[11] <br> 12. ^NAME[12] <br> 13. ^NAME[13] <br> 14. ^NAME[14] <br> 15. ^NAME[15] <br> 16. ^NAME[16] <br> 17. ^NAME[17] <br> 18. ^NAME[18] <br> 19. ^NAME[19] <br> 20. ^NAME[20] <br> 21. ^NAME[21] <br> 22. ^NAME[22] <br> 23. ^NAME[23] <br> 24. ^NAME[24] <br> 25. ^NAME[25] <br> 26. ^NAME[26] <br> 27. ^NAME[27] <br> 28. ^NAME[28] <br> 29. ^NAME[29] <br> 30. ^NAME[30] |  |
| $\begin{aligned} & \hline \text { CONTROL } \\ & \text { CARD } \end{aligned}$ | SHELTX | SHELTX | (Begin financial responsibility questions to determine CU's) <br> (DolDoes) (READ NAMES) pay for all ^yourhishertheir housing | <1,2,D,R> [goto FOODX] |

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| :---: | :---: | :---: | :---: | :---: |
|  |  |  | expenses with ^yourhishertheir own money? |  |
|  |  |  | $\wedge$ SUBFAMFILL |  |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| CONTROL CARD | FOODX | FOODX | (DolDoes) (READ NAMES) pay for all ^Yourhishertheir food expenses with ^Yourhishertheir own money? <br> ^SUBFAMFILL | <1> [IF SHELTX = 1, goto SHELTX for next subfam; <br> if no more subfams then goto UPDATE_SUBFAM] [else goto OTHERX] <br> <2,D,R> [goto OTHERX] |
|  |  |  | ^SUBFAMFILL |  |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| CONTROL CARD | OTHERX | OTHERX | (Do/Does) (READ NAMES) pay for all ^Yourhishertheir other living expenses such as clothing, transportation, etc., with ^Yourhishertheir own money? <br> ^SUBFAMFILL | <1> [IF SHELTX = 1 OR FOODX = 1, goto SHELTX for next subfamily: if no More subfamiles, goto UPDATE_SUBFAM] <br> [ELSE goto SUPSRC] |
|  |  |  |  | <2,D,R> [goto SUPSRC] |
|  |  |  | 1. Yes <br> 2. No |  |
| CONTROL CARD | SUPSRC | SUPSRC | Does all or part of the money to pay for (READ NAMES) ^description come from someone in this household? | $<1>$ [goto SUPRT1] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto SHELTX for next subfamily] <br>  [if no more subfamilies, goto UPDATE_SUBFAM] |
|  |  |  | $\wedge$ ^UBFAMFILL |  |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| CONTROL CARD | SUPRT1 | SUPRT1 | Who is that person(s)? <br> Enter line number(s), separate with commas <br> 1. ${ }^{\wedge}$ NAME[1] | <1-30,D,R> [IF SUPRT1 gt NROSIZE goto CK_SUPRT1] <br> [ELSE SHELTX for next subfamily] <br> [if no more, goto UPDATE_SUBFAM] |


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| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 2. ^NAME[2] <br> 3. ^NAME[3] <br> 4. ^NAME[4] <br> 5. ^NAME[5] <br> 6. ^NAME[6] <br> 7. ^NAME[7] <br> 8. ^NAME[8] <br> 9. ^NAME[9] <br> 10. ^NAME[10] <br> 11. ^NAME[11] <br> 12. ^NAME[12] <br> 13. ^NAME[13] <br> 14. ^NAME[14] <br> 15. ^NAME[15] <br> 16. ^NAME[16] <br> 17. ^NAME[17] <br> 18. ^NAME[18] <br> 19. ^NAME[19] <br> 20. ^NAME[20] <br> 21. ^NAME[21] <br> 22. ^NAME[22] <br> 23. ^NAME[23] <br> 24. ^NAME[24] <br> 25. ^NAME[25] <br> 26. ^NAME[26] <br> 27. ^NAME[27] <br> 28. ^NAME[28] <br> 29. ^NAME[29] <br> 30. ^NAME[30] |  |
|  | CONSUMER_UNITS | CONSUMER_UNITS | HOUSEHOLD MEMBERS BROKEN INTO APPROPRIATE CU'S <br> (List CU\#, Line number, and name) <br> 1. Enter 1 to Continue | <1> [goto CU_INTRO] |
| CONTROL CARD | CU_INTRO | CU_INTRO | During this interview, I will use the word household to refer to the group of related persons who are independent of all other persons living at this address for payment of their major expenses. <br> A "household" is considered one Consumer Unit <br> The ^persons I'm including in your household (arelis) (READ NAME(S)) <br> (Names of Cu members) | <1> [goto TUNIT2 block] |

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|  |  |  | 1. Enter 1 to Continue |  |
| CONTROL CARD | AGE | AGE1 | As of today, how old is are (You/NAME)? | <D,R> $>$ [goto AGE2] <br> $<0-200>$ $[$ IF CU_CODE $=1$ AND AGE It 16, goto CK_AGE] <br> [ELSEIF RESPLINE = MEMBNO AND AGE It 16,  <br> goto CK_AGE]  <br> $\quad[$ [ELSEIF AGE=13,15,61,64, then goto AGESPEC]  <br> $\quad[E L S E$ goto HORIGIN]  |
| CONTROL CARD | AGESPEC | AGESPEC | Some questions are only asked for household members of a certain age. In what month and year will (You/NAME) be (14/16/62/65) years old? <br> Enter month and year when household member will turn (14/16/62/65) | <entry,D,R> [goto HORIGIN] |
| CONTROL CARD | AGE2 | AGE2 | - Ask if necessary <br> (Are/ls) (you/he/she) under 16? <br> 1. Yes <br> 2. No | $<1>$ [if RESPLINE $=$ MEMBNO then goto CK_AGE2] <br>  [else if CU_CODE $=1$ then goto CK_AGE2] <br>  [else goto HORIGIN] |
| CONTROL CARD | HORIGIN | HORIGIN | [H1 2 <br> (Are/ls) (You/NAME) Hispanic, Latino, or Spanish? <br> 1. Yes <br> 2. No | $<1>$ [goto HISPANIC] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto MULTRACE] |
| $\begin{aligned} & \hline \text { CONTROL } \\ & \text { CARD } \end{aligned}$ | HISPANIC | HISPANIC | [1H2 <br> (Are/ls) (You/NAME) - <br> Examples of "other" include - Argentinean, Colombian, Dominican, Nicaraguan, Salvadoran, Spaniard <br> 1. Mexican? <br> 2. Mexican-American? <br> 3. Chicano? <br> 4. Puerto Rican? | $<1-5, \mathrm{D}, \mathrm{R}>$ [goto MULTRACE] <br> $<6>$ [goto HISPOTH] |

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|  |  |  | 5. Cuban? <br> 6. Other (Specify) |  |
| $\begin{aligned} & \hline \text { CONTROL } \\ & \text { CARD } \\ & \hline \end{aligned}$ | HISPOTH | HISPOTH | - Specify: | <30 characters> [goto MULTRACE] |
| CONTROL CARD | MULTRACE | MULTRACE | [H2 <br> What is (your/NAME's) race? <br> - Probe if necessary <br> - Enter all that apply, separate with commas <br> - Examples of "Other Pacific Islander" include - Fijian, Tongan <br> 1. White <br> 2. Black or African American <br> 3. American Indian or Alaska native <br> 4. Asian <br> 5. Native Hawaiian <br> 6. Guamanian or Chamorro <br> 7. Samoan <br> 8. Other Pacific Islander <br> 9. Other Specify <br> 10. Don't Know |  |
| CONTROL CARD | ASIAN | ASIAN | ^ARE_IS (You/NAME) - <br> Examples of "other" include - Hmong, Laotian, Thai, Pakistani, Cambodian <br> 1. Chinese? <br> 2. Filipino? <br> 3. Japanese? <br> 4. Korean? <br> 5. Vietnamese? <br> 6. Asian Indian? <br> 7. Other? (Specify) | $<1-6, \mathrm{D}, \mathrm{R}>$ [IF AGE ge 14 OR AGERNG $=8$ or 9 goto <br> MARITAL] [ELSE goto Next Person] <br>  [goto ASIANOTH] <br> $<7>$  |
| CONTROL CARD | ASIANOTH | ASIANOTH | - Specify: | <30 characters> [IF AGE ge 14 OR AGERNG = 8 or 9 goto MARITAL] <br> [ELSE goto Next Person] |
| $\begin{aligned} & \hline \text { CONTROL } \\ & \text { CARD } \end{aligned}$ | RACESP | RACESP | - Specify other race | <40 characters> [IF AGE ge 14 OR AGERNG $=8$ or 9 goto MARITAL] <br> [ELSE goto Next Person] |

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|  |  |  |  | <empty> |
| CONTROLCARD | MARITAL | MARITAL | - Ask if not apparent | <1-5,D,R> [IF AGE ge 14 or AGERNG $=8$ or 9 goto EDUCA] <br> [ELSE goto BIRTH_MO for next member] |
|  |  |  | $\wedge$ ARE_IS ^YOUNAME - |  |
|  |  |  | 1. Married? <br> 2. Widowed? <br> 3. Divorced? <br> 4. Separated? <br> 5. Never married? |  |
| CONTROL CARD | EDUCA | EDUCA | [14 3 <br> What is the highest level of school ^NamehasYou completed or the highest degree ^NamehasYou received? | <00-11,38,D,R> [IF AGE = 16-65 or AGERNG = 8 or 9 , goto ARM_FORC] <br> [ELSE goto BIRTH_MO for next member] |
|  |  |  |  | <39-46> [goto IN_COLL] |
|  |  |  | 0. Never attended, preschool, kindergarten <br> 1. 1st grade <br> 2. 2nd grade <br> 3. 3rd grade <br> 4. 4th grade <br> 5. 5th grade <br> 6. 6th grade <br> 7. 7 th grade <br> 8. 8th grade <br> 9. 9th grade <br> 10. 10th grade <br> 11. 11th grade <br> 38. 12th grade NO DIPLOMA <br> 39. HIGH SCHOOL GRADUATE - high school DIPLOMA, or the equivalent <br> 40. Some college but no degree <br> 41. Associate degree in college - Occupational program <br> 42. Associate degree in college - Academic program <br> 43. Bachelor's degree (Example: BA, AB, BS) <br> 44. Master's degree (Example: MA, MS, Meng, MSW, MBA) <br> 45. Professional School Degree (Example: MD, DDS, DVM, LLB, JD) <br> 46. Doctorate degree (Example: PhD, EdD) |  |
| CONTROL CARD | IN_COLL | IN_COLL | (Are/ls) (You/NAME) currently enrolled in a college or university either - | $<1-3, D, R>$ [IF AGE $=16-65$ or AGERNG $=8$ or 9 , goto ARM_FORC] [ELSE goto BIRTH_MO for next member] |

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|  |  |  | 3. Not at all? |  |
| CONTROL CARD | ARM_FORC | ARM_FORC | [H1 3 ? [F1] <br> ^Are_is (You/NAME) now in the Armed Forces? | $<1,2, \mathrm{D}, \mathrm{R}>$ [ff this is the last person, goto CHECKS2] <br> [Else goto BIRTH_MO for the next person] |
|  |  |  | 1. Yes <br> 2. No |  |
| CONTROL CARD | CE_INTRO | CE_INTRO | As we start, please understand that we ask the same questions of everybody we talk to. I realize some of these questions may not apply to your household. <br> Most questions that I will be asking refer to a specific time period. <br> During this interview, the time period, unless I state otherwise is for the <br> Past (month/three months), that is, from the 1st day of ^REF_MONTH to today. <br> Most of my questions are about expenses your household had or bills you've received. You will find it helpful to have your checkbook register, credit card statements, and other records as you answer the questions. <br> Please include all shipping and handling fees when reporting the cost of an item. For some types of things, such as furniture or appliances, I will ask for these fees specifically. For other things, such as recreational items, I won't mention shipping and handling, so if you purchased something online and had it shipped, or had any other shipping fees, please include them in the total cost. <br> 1. Enter 1 to Continue | > [goto SECTION1] |
|  |  | FlowCharts |  |  |
| 01B | PUBLHOUS | PUBLHOUS | Ask if not apparent. <br> Is this house in a public housing project, that is, is it owned by a local housing authority or other local public agency? <br> 1. Yes <br> 2. No | $\begin{array}{ll}<1> & \text { [goto ST_HOUS] } \\ <2, \mathrm{D}, \mathrm{R}> & \text { [goto GOVTCOST] }\end{array}$ |
| 01B | GOVTCOST | GOVTCOST | Are your housing costs lower because the Federal, State, or local government is paying part of the cost? <br> 1. Yes <br> 2. No | <1,2,D,R> [goto ST_HOUS] |

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| 01B | ST_HOUS | ST_HOUS | Ask if not apparent. <br> Are these living quarters presently used as student housing by a college or university? <br> 1. Yes <br> 2. No | <1,2,D,R> [goto BUILDING] |
| 01B | BUILDING | BUILDING | [E] 4 ? [F1] <br> Ask if not apparent by observation <br> Which best describes this building? <br> 1. Single Family Detached <br> 2. Row or Townhouse - inner unit <br> 3. End row or end townhouse <br> 4. Duplex <br> 5. 3-plex or 4-plex <br> 6. Garden <br> 7. High-rise <br> 8. Apartment or flat <br> 9. Mobile home or trailer <br> 10. College dormitory <br> 11. Other - Specify | $<1-9, \mathrm{D}, \mathrm{R}>$ [goto ROOMSQ] <br> $<10>$ [IF ST_HOUS = 2, D or R then goto <br> CK_BUILDING]  <br>  [ELSE goto S1B_END] <br> $<11>$ [goto BUILDOTH] |
| 01B | BUILDOTH | BUILDOTH | - Specify: | <30 characters> [goto ROOMSQ] |
| 01B | ROOMSQ | ROOMSQ | How many ROOMS are there in this unit, including all finished living areas and excluding all bathrooms? | $<1-30, \mathrm{D}, \mathrm{R}>$ [goto BEDROOMQ] <br> $<31-99>$ [goto ERR1_ROOMSQ] |
| 01B | BEDROOMQ | BEDROOMQ | How many BEDROOMS are there in this unit? <br> Count all rooms used mainly for sleeping, even if also used for other purposes. | <0-99> [IF (BEDROOMQ gt ROOMSQ) AND (ROOMSQ ne $D$ and ne $R$ ) then goto CK_BEDROOMQ] <br> [ELSEIF BEDROOMQ gt 12 then goto <br> ERR1_BEDROOMQ] <br> [ELSE goto BATHRMQ] <br> <D,R> [goto BATHRMQ] |
| 01B | BATHRMQ | BATHRMQ | How many COMPLETE bathrooms are there in this unit? <br> A complete bathroom has a toilet, a bathtub or shower, and a sink, all with running water. | <0-9> [IF (BATHRMQ gt ROOMSQ) AND (ROOMSQ ne D and ne R) then goto CK_BATHRMS] <br> [ELSE goto HLFBATHQ] <br> <D,R> [goto HLFBATHQ] |
| 01B | HLFBATHQ | HLFBATHQ | How many HALF bathrooms are there in this unit? | <0-9> [IF (HLFBATHQ gt ROOMSQ) AND (ROOMSQ ne |

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|  |  |  | 4. Other - Specify <br> 5. No Fuel Used |  |
| 01B | COOKOTH | COOKOTH | * Specify: | <30 Characters> [goto UNITFEAT] |
| 01B | UNITFEAT | UNITFEAT | [1] 4 ? [F1] <br> Does this unit have any of the following? <br> - Enter all that apply, separate with commas | $<0-6,77, R>$ [IF 0 is selected with other values, goto CK_UNITFEAT] <br> [ELSE goto YRBUILT] |
|  |  |  | 0. None <br> 1. Swimming Pool <br> 2. Off Street Parking <br> 3. Porch, terrace, patio, or balcony <br> 4. Apartment or guest house <br> 5. Central air conditioning <br> 6. Window air conditioning <br> 77. Don't know |  |
| 01B | YRBUILT | YRBUILT | About when was this building originally built? Do not consider later remodelings <br> - Probe for best estimate | ```<1700-9999> [IF YRBUILT gt current year then goto CK_YRBUILT] [ELSE goto S1B_END] <D,R> [goto S1B END]``` |
| 01C | COOKOVN | COOKOVN | [A] 5 ? [F1] <br> How many cooking stoves, ranges or ovens (doldoes) ^YOU_YRCU have? <br> Enter 0 for none | $<0, \mathrm{D}, \mathrm{R}>$ [goto MIC_OVEN] <br> $<1-5>$ [goto B_S1C.INCLHOME] <br> $<6-99>$ [goto ERR1_COOKOVN] |
| 01C | MIC_OVEN | MIC_OVEN | [1] 5 [F1] <br> How many microwave ovens (do/does) ^YOU_YRCU have? <br> Enter 0 for none | <0,D,R> [goto REFRFREZ] <br> $<1-5>$ [goto B_S1C.INCLHOME] <br> $<6-99>$ [goto ERR1_MIC_OVEN] |
| 01C | REFRFREZ | REFRFREZ | [1] 5 ? [F1] <br> How many refrigerators and home freezers (do/does) ^YOU_YRCU have? <br> Enter 0 for none | $<0, \mathrm{D}, \mathrm{R}>$ [goto BLTNDISH] <br> $<1-5>$ [goto B_S1C.INCLHOME] <br> $<6-99>$ [goto ERR1_REFRFREZ] |
| 01C | BLTNDISH | BLTNDISH | [期 5 ? [F1] <br> How many built-in dishwashers (do/does) ^YOU_YRCU have? <br> Enter 0 for none | $\begin{array}{ll} \hline<0, \mathrm{D}, \mathrm{R}> & \text { [goto PORTDISH] } \\ <1-5> & \text { [goto B_S1C.INCLHOME] } \\ <6-99> & \text { [goto ERR1_BLTNDISH] } \end{array}$ |

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| 01C | PORTDISH | PORTDISH | [W] 5 [F1] <br> How many portable dishwashers (do/does) ^YOU_YRCU have? <br> Enter 0 for none | $<0, \mathrm{D}, \mathrm{R}>$ [goto GARBDISP] <br> $<1-5>$ [goto B_S1C.INCLHOME] <br> $<6-99>$ [goto ERR1_PORTDISH] |
| 01C | GARBDISP | GARBDISP | [EA 5 ? [F1] <br> How many garbage disposals (do/does) ^YOU_YRCU have? <br> Enter 0 for none | <0,D,R> [goto CLWASHER] <br> $<1-5>$ [goto B_S1C.INCLHOME] <br> $<6-99>$ [goto ERR1_GARBDISP] |
| 01C | CLWASHER | CLWASHER | [且 5 ? [F1] <br> How many clothes washers (do/does) ^YOU_YRCU have? <br> Enter 0 for none | <0,D,R> [goto CLDRYER] <br> $<1-5>$ [goto B_S1C.INCLHOME] <br> $<6-99>$ [goto ERR1_CLWASHER] |
| 01C | CLDRYER | CLDRYER | [4] ? [F1] <br> How many clothes dryers (do/does) ^YOU_YRCU have? <br> Enter 0 for none | <0,D,R> [goto CLRTV] <br> $<1-5>$ [goto B_S1C.INCLHOME] <br> $<6-99>$ [goto ERR1_CLDRYER] |
| 01C | CLRTV | CLRTV | [1] 5 ? F 1$]$ <br> How many televisions (do/does) ^YOU_YRCU have? <br> Enter 0 for none | <0,D,R> [goto HM_COMP] <br> $<1-5>$ [goto B_S1C.INCLHOME] <br> $<6-99>$ [goto ERR1_CLRTV] |
| 01C | HM_COMP | HM_COMP | [动 5 ? [F1] <br> How many home computers (do/does) ^YOU_YRCU have? <br> Enter 0 for none | $\begin{array}{ll} \hline<0, \mathrm{D}, \mathrm{R}> & \text { [goto SND_SYS] } \\ <1-5> & \text { [goto B_S1C.INCLHOME] } \\ <6 \text {-99> } & \text { [goto ERR1_HM_COMP] } \end{array}$ |
| 01C | SND_SYS | SND_SYS | [2] 5 [F1] <br> How many stereo or sound systems (doldoes) ^YOU_YRCU have? <br> Enter 0 for none | <0,D,R> [goto VIDEO_EQ] <br> $<1-5>$ [goto B_S1C.INCLHOME] <br> $<6-99>$ [goto ERR1_SND_SYS] |
| 01C | VIDEO_EQ | VIDEO_EQ | [4] ? [F1] <br> How many VCR's, DVD players, or digital video recorders (do/does) ^YOU_YRCU have? <br> Enter 0 for none | <0,D,R> [goto S1C_END] <br> $<1-5>$ [goto B_S1C.INCLHOME] <br> $<6-99>$ [goto ERR1_VIDEO_EQ] |
| 01C | INCLHOME | INCLHOME | ${ }^{\wedge}$ WASWERE included in the home when you moved in? | $\begin{array}{cc}<1,2, \mathrm{D}, \mathrm{R}> & \left.\begin{array}{c}\text { [goto next question on grid] } \\ {[\text { If no more screeners, goto S1C_end] }}\end{array}\right]\end{array}$ |

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|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 02 | STLRENT | STLRENT | Last time ${ }^{\wedge}$ YOU_YRCU reported renting these living quarters. Do you still rent? | $<1, \mathrm{D}, \mathrm{R}>$ [goto RENTED] <br> $<2>$ [goto RTASPAY] <br> $<3>$ [goto Section 3] |
|  |  |  | 1. Yes <br> 2. No <br> 3. No -Buying the sample unit |  |
| 02 | OWNED | OWNED | Do you own this home? <br> - Include households with mortgages as owners. | $\begin{array}{lc} \hline<1> & \text { [goto Section 3] } \\ <2, \mathrm{D}, \mathrm{R}> & \text { [goto RENTED] } \end{array}$ |
|  |  |  | 1. Yes 2. No |  |
| 02 | RENTED | RENTED | Do ^YOU_ANYMEM ^FSTILL pay rent for these living quarters? | $\begin{array}{cc}<1, \mathrm{D}, \mathrm{R}> & {[\text { IF INTNMBR = } 1 \text { goto BRent02.RENTX3] }} \\ & {[\text { ELSE goto BRent02.RENTX1] }}\end{array}$ |
|  |  |  | 1. Yes <br> 2. No | <2> [goto BRent02.RTASPAY] |
| 02 | MORERENT | MORERENT | Since the first of ^REF_MONTH have ^YOU_ANYMEM rented any houses, apartments, or temporary living quarters NOT used entirely for business or vacation? | $\begin{array}{cc}<1> & {[\text { IF INTNMBR }=1 \text { goto BRent02.RENTX3] }} \\ \text { [ELSE goto BRent02.RENTX1] }\end{array}$ |
|  |  |  | - Do NOT include college or university regulated housing. | <2,D,R> [goto S2_END] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 02 | RENTX1 | RENTX1 | What was your total rental payment for ^REF_MONTH for this unit? Include any extra charges for garage or parking facilities, but do not include direct payments by local, state or federal agencies. | ```<0-9999999> [IF RENTX1 gt 3000 then goto ERR1_RENTX1] [ELSE goto RENTX2]``` |
|  |  |  |  | <D,R> [goto RENTX2] |
| 02 | RENTX2 | RENTX2 | What was the total rental payment for ^TWO_MONTH for this unit? | ```<0-9999999> [IF RENTX2 gt 3000 then goto ERR1_RENTX2] [ELSE goto RENTX3]``` |
|  |  |  |  | <D,R> [goto RENTX3] |
| 02 | RENTX3 | RENTX3 | What was your total rental payment for ^LAST_MONTH for this unit? | <0-9999999> [IF RENTX3 gt 3000 then goto ERR1_RENTX3] |

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|  |  |  | (Include any extra charges for garages or parking facilities, but do not include direct payments by local, state or federal agencies.) | [ELSE goto RTELECT] |
| 02 | RTELECT | RTELECT | 1. Yes <br> 2. No | <1,2,D,R> [goto RTGAS] |
| 02 | RTGAS | RTGAS | - Repeat if necessary | <1,2,D,R> [goto RTWATER] |
|  |  |  | Does the rental payment include the cost of - $\qquad$ <br> 1. Yes <br> 2. No |  |
|  |  |  |  |  |
| 02 | RTWATER | RTWATER | Repeat if necessary Does the rental payment include the cost of . . . Piped in water? | <1,2,D,R> [goto RTHEAT] |
|  |  |  | 1. Yes |  |
| 02 | RTHEAT | RTHEAT | Repeat if necessary Does the rental payment include the cost of .... Heating? | <1,2,D,R> [goto RTTRASH] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 02 | RTTRASH | RTTRASH | Repeat if necessary Does the rental payment include the cost of - <br> ... Trash/garbage collection? | <1,2,D,R> [goto RTPARK] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 02 | RTPARK | RTPARK | Repeat if necessary Does the rental payment include the cost of - | <1,2,D,R> [goto RTTELEPH] |

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| . . Garage and parking facilities? |  |  |  |  |
|  |  |  | 1. Yes <br> 2. No |  |
| 02 | RTTELEPH | RTTELEPH | Repeate if necessary Does the rental payment include the cost of ... Telephone services? | <1,2,D,R> [goto RTTVCABL] |
|  |  |  | 1. Yes <br> 2. No |  |
| 02 | RTTVCABL | RTTVCABL | Repeat if necessary <br> Does the rental payment include the cost of - <br> ... Television services? <br> 1. Yes <br> 2. No | <1,2,D,R> [goto RTINTRNT] |
| 02 | RTINTRNT | RTINTRNT | Repeat if necessary Does the rental payment include the cost of ... Internet services? <br> 1. Yes <br> 2. No | <1,2,D,R> [goto RTFUNSH] |
| 02 | RTFUNSH | RTFUNSH | Repeat if necessary <br> Does the rental payment include the cost of - <br> .. . Furniture? <br> 1. Yes <br> 2. No | <1,2,D,R> [goto RTASPAY] |
| 02 | RTASPAY | RTASPAY | Did ^YOU_ANYMEM receive any reduced or free rent for this unit as a form of pay since the first of ^REF_MONTH? <br> 1. Yes <br> 2. No | $<1>$ [goto RTCOMPX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto RTBSNS] |
| 02 | RTCOMPX | RTCOMPX | What is the current monthly rental charge to another tenant for a similar unit? | $\begin{gathered} \hline<0-999999>\text { [IF RTCOMPX It } 100 \text { or gt } 1550 \text { then goto } \\ \text { ERR1_RTCOMPX] } \\ {[\text { ELSE goto REGRNTX] }} \end{gathered}$ |

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|  |  |  |  | [If INTNMBR = 2-5 and there are no records on input with 8500.OPB_STAT=1 goto PURPROP] |
| 03A1 | STILOWN | STILOWN | ${ }^{\wedge}$ CU_DODOES ^YOU_YRCU still own your (property description)? <br> Prop \#\|Description |Type |\# Mort|\# LSHEL \# LCHEL <br> 1. Yes <br> 2. No | <1,2,D,R> [goto BSNSEXPA] |
| 03A1 | BSNSEXPA | BSNSEXPA | (Are/Were) any of the expenses for this property deducted as a farm, rental, or business expense? <br> Prop \# \|Description |Type |\# Mort|\# LSHEL |\# LCHEL <br> 1. Yes <br> 2. No | <1> [goto OBSNSZBA] <br> <2,D,R> [IF there are previously reported loans with 8500.LOANTYPE $=1$, 2 AND 8500.OPF_STAT $=1$, goto BMCHANGE Block] <br> [ELSEIF there are previously reported loans with 8500.LOANTYPE $=3$ AND 8500.OPH_STAT $=1$, exit block and goto PDLOAN2 in the THomeEquity block] <br> [ELSEIF (no loans) OR (all previously reported loans have been updated) exit block and goto ADDMORT in the TAddMort block] |
| 03A1 | OBSNSZBA | OBSNSZBA | What percent of the expenses for this property (is/was) deducted? Include the portion used for business, farming, or rented to someone outside the household. <br> Prop \# \|Description |Type |\# Mort|\# LSHEL |\# LCHEL | <1-99,D,R> [IF (there are previously reported loans with 8500.LOANTYPE $=1,2$ ) AND 8500.OPF_STAT =1) goto MCHANGE] <br> [ELSEIF (there are previously reported loans with 8500.LOANTYPE $=3$ ) AND (8500.OPH_STAT = 1) exit block and goto PDLOAN2 in the THomeEquity block] <br> [ELSEIF (no loans) OR (all previously reported loans have been updated) exit block and goto ADDMORT in the TAddMort Block] <br> <100> [goto ERR2_OBSNSZBA] |
| 03A1 | MCHANGE | MCHANGE | (Since your last interview, have there been any changes to your ^mortgage_lumpsum such as refinancing, a change in property taxes or insurance, ending the loan, or paying less than the required amount?/For the $\wedge$ mortgage_lumpsum in which you reported a payment $\wedge$ I_MRTPMTX, since your last interview, have there been any changes to that ^mortgage_lumpsum, such as refinancing, a change in property taxes or insurance, ending the loan, or paying less than the required amount?) <br> 1. Yes <br> 2. No | <1> [goto MORTCHNG] <br> <2,D,R> [IF 8500.FIXEDRTE $=1$ goto MCHANGE for the next loan for this property with 8500.LOANTYPE =1, 2 and 8500.OPF_STAT = 1 <br> IF there are loans with LOANTYPE $=3$ and OPF_STAT = 1 goto PDLOAN2 in THomeequity block ELSE goto ADDMORT in TAddmort block] [ELSEIF goto PYMTJX1] |
| 03A1 | MORTCHNG | MORTCHNG | What was the reason for the change in your <br> (mortgagellump sum home equity loan) for your (property description)? <br> 1. Change in escrow payment (include changes in property taxes, insurance) <br> 2. Change in interest rate <br> 3. Paid off | $<1,4>$ [goto PYRINIJ] <br> $<2>$ [goto NEWMRRTJ] <br> $<3>$ [goto MORTCHMO] <br> $<5,6,8,9$, D,R> [goto ORWHAT]  <br> $<7>$ [goto PYMTJX1]  |

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|  |  |  | 4. Change in amount of the graduated payment for a graduated payment ^LOAN <br> 5. ^MORTGAGE_LUMPSUM2 renegotiated (rollover or renegotiable ^MORTGAGE_LUMPSUM) <br> 6. Refinanced $\wedge$ MORTGAGE_LUMPSUM (this includes changing the term of the ${ }^{\wedge}$ MORTGAGE_LUMPSUM) <br> 7. Paid less than the required amount <br> 8. Other reasons <br> 9. More than one of the above |  |
| 03A1 | ORWHAT | ORWHAT | Is this a 30-year (mortgage/lump sum home equity loan), a 15-year (mortgage/lump sum home equity loan), or something else? <br> 1. 30-year <br> 2. 15-year <br> 3. Other-specify | $<1,2, \mathrm{D}, \mathrm{R}>$ [goto FIXEDRTJ] <br> <3>to MRTTERMJ]  |
| 03A1 | MRTTERMJ | MRTTERMJ | - Enter number of years. | <1-50,D,R> [goto FIXEDRTJ] |
| 03A1 | FIXEDRTJ | FIXEDRTJ | Is this a fixed rate (mortgagellump sum home equity loan)? <br> 1. Yes <br> 2. No | $<1>$ [goto ORGMRTJX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto PAYTYPJ] |
| 03A1 | PAYTYPJ | PAYTYPJ | There are many different kinds of (mortgagellump sum home equity loan) (s). Which one of these comes closest to Yours Your CU's? <br> Read each item on list. <br> Mark all that apply, separate with commas. <br> 1. Variable or adjustable interest rate (ARM) <br> 2. Interest only <br> 3. Something else - specify | ```<1-3,D,R> [If PAYTYPJ = 1 AND FIXEDRTJ = 2 goto CK_PAYTYPJ] [ELSEIF precode 3 is selected goto PAYTOTHJ] [ELSE goto ORGMRTJX]``` |
| 03A1 | PAYTOTHJ | PAYTOTHJ | - Specify: | <30 characters> [goto ORGMRTJX] |
| 03A1 | ORGMRTJX | ORGMRTJX | What was the amount of the (mortgage/lump sum home equity loan) when $\wedge$ YOU_YRCU first obtained it, not including any interest? | <1-99999999> [IF (8500.OWNYB = 100 and ORGMRTJX It <br> 5000 or gt 315000) OR <br> (8500.OWNYB $=200$ and ORGMRTJX It 3000 or gt <br> 350000) OR <br> (8500.OWNYB $=300$ and ORGMRTJX It 3000 or gt <br> 400000) OR <br> (8500.OWNYB $=400$ and ORGMRTJX It 1000 or gt <br> 124900) OR <br> (8500.OWNYB $=500$ and ORGMRTJX It 2000 or gt <br> 300000) then goto ERR1_ORGMRTJX] <br> [ELSE goto NEWMRRTJ] <br> <D,R> [goto NEWMRRTJ] |
| 03A1 | NEWMRRTJ | NEWMRRTJ | ? [F1] <br> What is the current interest rate for this (mortgage/lump sum home equity loan)? | <00.000-99.999> [IF entry lt 5 or gt 14 goto ERR1_NEWMRRT] <br> [ELSE goto PYRINIJ] |

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|  |  |  | - Enter percent including decimal | <D,R> [goto PYRINIJ] |
| 03A1 | PYRINIJ | PYRINIJ | [ 7 | $<1-5,77, R>$ [IF both 1 and 2 were NOT selected then goto CK_PYRINIJ] |
|  |  |  | On Your Your CU's last regular payment, which of these things were included? | [ELSEIF 8500. FIXEDRTE $=2, \mathrm{D}, \mathrm{R}$ or FIXEDRTJ $=$ 2,D,R |
|  |  |  | - Enter all that apply, separate with commas | goto MORTCHMO] <br> [ELSE goto MRTPMTJX] |
|  |  |  | 1. Principal | <6> [goto PYJOTH] |
|  |  |  | 2. Interest |  |
|  |  |  | 3. Property taxes |  |
|  |  |  | 4. Property insurance |  |
|  |  |  | 5. Mortgage guarantee insurance |  |
|  |  |  | 6. Any other payments-specify <br> 77. Don't know |  |
| 03A1 | PYJOTH | PYJOTH | - Specify: | $<30$ characters> [lf 8500.FIXEDRTE $=2, \mathrm{D}, \mathrm{R}$ or FIXEDRTJ $=2$ D, R goto MORTCHMO], else [goto MRTPMTJX] $=2, \mathrm{D}, \mathrm{R}$ goto MORTCHMO], else [goto MRTPMTJX] |
| 03A1 | MRTPMTJX | MRTPMTJX | How much is Your Your CU's (mortgagellump sum home equity loan) payment per month? | <1-99999999,D,R> [IF entry lt 246 or gt 2690 goto ERR1_MRTPMTJX] <br> [ELSEIF any codes 3-6 are selected in PYRINIJ goto PRININJX] <br> [ELSE goto MORTCHMO] |
| 03A1 | PRININJX | PRININJX | How much of that amount is for (principal / interest/principal and interest)? | ```<0-999999999> [IF entry It 40 or gt 2700 goto ERR1_PRININJX] \\ [ELSEIF PRININJX gt MRTPMTJX gotoNone``` |
|  |  |  |  | <D,R> [goto MORTCHMO] |
| 03A1 | MORTCHMO | MORTCHMO | In what month did (you pay off your (mortgage/lump sum home equity loan)?lyour (mortgage/lump sum home equity loan) change?)? | $<1-12, D, R>$ [IF ENTRY is not in the reference period and ne D, R goto CK_MORTCHMO] <br> [ [If (FIXEDRTJ = 2, D, R) or (FIXEDRTJ ne 1 AND |
|  |  |  | 1. January | 8500.FIXEDRTE $=2, \mathrm{D}, \mathrm{R}$ ) goto PYMTJX1] |
|  |  |  | 2. February | else goto MCHANGE for next loan for this |
|  |  |  | 3. March | property with 8500.LOANTYPE $=1,2$ and |
|  |  |  | 4. April | 8500.OPF_STAT = 1] |
|  |  |  | 5. May 6. June | [If no more loans with (8500.LOANTYPE $=1,2$ and |
|  |  |  | 7. July | 8500.OPF_STAT $=1$ ) for this property AND there are loans |
|  |  |  | 8. August | for this property with 8500.LOANTYPE $=3$ and |
|  |  |  | 9. September <br> 10. October | 8500.OPH_STAT $=1$, goto PDLOAN2 in Thomequity block] [ELSE goto ADDMORT in TAddmort block] |

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|  |  |  | 11. November 12. December |  |
| 03A1 | PYMTJX1 | PYMTJX1 | How much was Your Your CU's payment on this ^mortgage_lumpsum in ^REF_MONTH? | <1-99999999, D,R> [IF PYMTJX1 It 246 or gt 2690 and ne D or R then goto ERR1_PYMTJX1] <br> [ELSEIF (any codes 3-6 selected in PYRINIJ) or 8500. PAYPROTX $=3$ or 8500. PAYPROIN $=4$ or 8500.PAYMORIN $=5$ or 8500.PAYOTHER $=6$ goto PRNINJX1] <br> [ELSE goto PYMTJX2] |
|  |  |  |  | <0> [goto PYMTJX2] |
| 03A1 | PRNINJX1 | PRNINJX1 | How much of that amount is for ^prinint_fill? | <0-99999999 > [IF PRNINJX1 It 40 or gt 2700, goto ERR1_PRNINJX1] <br> [ELSEIF PRNINJX1 gt PYMTJX1, goto CK_PRNINJX1] <br> [ELSE goto PYMTJX2] |
|  |  |  |  | <D,R> [goto PYMTJX2] |
| 03A1 | PYMTJX2 | PYMTJX2 | How much was Your Your CU's payment on this ^mortgage_lumpsum in ^ ^WO_MONTH? | <1-99999999,D,R> [IF PYMTJX2 It 246 or gt 2690 and ne D or R goto ERR1_PYMTJX2] <br> [ELSEIF any codes 3 to 6 selected in PYRINIJ or <br> 8500. PAYPROTX $=3$ or 8500. PAYPROIN $=4$ or 8500.PAYMORIN $=5$ or 8500. PAYOTHER $=6$ goto PRNINJX2] <br> [ELSE PYMTJX3] |
|  |  |  |  | <0> [goto PYMTJX3] |
| 03A1 | PRNINJX2 | PRNINJX2 | How much of that amount is for (principal / interest/principal and interest)? | <0-99999999> [IF PRNINJX2 gt PYMTJX2, goto CK_PRNINJX2] <br> [ELSEIF PRNINJX2 It 40 or gt 2700, goto ERR1_PRNINJX2] <br> [ELSE goto PYMTJX3] |
|  |  |  |  | <D,R> [goto PYMTJX3] |
| 03A1 | PYMTJX3 | PYMTJX3 | How much was Your Your CU's payment on this (mortgagellump sum home equity loan) in ^LAST_MONTH? | <0-99999999,D,R> [IF PYMTJX3 It 246 or gt 2690 and ne D or R goto ERR1_PYMTJX3 <br> [ELSEIF (any codes 3 to 6 selected in PYRINIJ) or <br> 8500. PAYPROTX $=3$ or 8500. PAYPROIN $=4$ or <br> 8500. PAYMORIN $=5$ or 8500. PAYOTHER $=6$ ) goto PRNINJX3] <br> [ELSE goto MCHANGE for the next loan for this property with 8500.LOANTYPE $=1$ or 2 AND 8500.OPF_STAT = 1] <br> [lf no more loans and there are loans with |

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|  |  |  |  | 8500.LOANTYPE = 3 goto PDLOAN2 in THomeequity block else goto ADDMORT in TAddmort block] |
| 03A1 | PRNINJX3 | PRNINJX3 | How much of that amount is for (principal / interest/principal and interest)? | <0-99999999> [IF PRNINJX3 gt PYMTJX3 goto CK_PRNINJX3] <br> [ELSEIF PRNINJX3 It 40 or gt 2700 goto ERR1_PRNINJX3] <br> [goto MCHANGE for next loan for this property with 8500.LOANTYPE $=1$ or 2 AND 8500.OPF_STAT $=1$ ] <br> [IF no more loans with 8500.loantype $=1$ or 2 and there are loans with 8500.LOANTYPE $=3$, goto PDLOAN2] <br> [ELSE goto ADDMORT] <br> <D,R> [goto MCHANGE for next loan for this property with 8500.LOANTYPE $=1$ or 2 AND 8500.OPF_STAT = 1] <br> [IF no more loans with 8500 .loantype $=1$ or 2 and there are loans with 8500.LOANTYPE $=3$ goto PDLOAN2] <br> [ELSE goto ADDMORT] |
| 03A1 | PDLOAN2 | PDLOAN2 | Since the first of ^ REF_MONTH, (have/has) ^YOU_YRCU made any payments for your line of credit home equity loan? | $\begin{array}{lc} \hline<1> & \text { [goto PD2AMTX] } \\ <2, \mathrm{D}, \mathrm{R}>\text { [goto TOTOWED2] } \end{array}$ |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 03A1 | PD2AMTX1 | PD2AMTX1 | What was the total amount paid in ^REF_MONTH? | ```<1-99999999> [IF (8500.OWNYB = 1 and PD2AMTX1 It 15 or gt 6000) OR (8500.OWNYB = 200-500 and PD2AMTX1 It 35 or gt 35000) goto ERR1_PD2AMTX1] [ELSEIF INTNMBR \(=1\) goto TOTOWED2] [ELSE goto PD2AMTX2] <O,D,R> [IF INTNMBR = 1 goto TOTOWED2] [ELSE goto PD2AMTX2]``` |
| 03A1 | PD2AMTX2 | PD2AMTX2 | What was the total amount paid in ^TWO_MONTH? | ```<1-99999999> [IF (8500.OWNYB = 1 and PD2AMTX2 It 14 or gt 6000) OR (8500.OWNYB \(=200-500\) and PD2AMTX2 It 34 or gt 35000) goto ERR1_PD2AMTX2] [ELSE goto PD2AMTX3] <0,D,R> [goto PD2AMTX3]``` |
| 03A1 | PD2AMTX3 | PD2AMTX3 | What was the total amount paid in ^LAST_MONTH? | <1-99999999> [IF (8500.OWNYB = 1 and PD2AMTX3 It 14 or gt 6000) OR (8500.OWNYB = 200-500 and PD2AMTX3 It 34 or gt 35000) goto ERR1 PD2AMTX3] |

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|  |  |  |  | [ELSE goto TOTOWED2] |
|  |  |  |  | <0,D,R> [goto TOTOWED2] |
| 03A1 | TOTOWED2 | TOTOWED2 | How much was owed before the last payment? | <0-99999999, D,R> [IF TOTOWED2 It PD2AMTX3, goto CK_TOTOWED2] <br> [ELSEIF (8500.OWNYB = 100 and TOTOWED2 It <br> 165 or gt 104400) OR (8500.OWNYB $=200-500$ and <br> TOTOWED2 It 2000 or gt 100000) goto <br> ERR1_TOTOWED2] <br> [goto PDLOAN2 for next loan for this property with <br> 8500.LOANTYPE $=3$ and 8500.OPH_STAT $=1$ ] <br> [if no more loans for this property with <br> 8500.LOANTYPE $=3$ and $8500 . \mathrm{OPH}_{-}$STAT $=1$, <br> goto ADDMORT] |
| 03A1 | ADDMORT | ADDMORT | Since the first of ^REF_MONTH, (have/has) ^YOU_YRCU obtained any (additional/ ) mortgages, including second mortgages or home equity loans, for your (property description)? <br> (do not include reverse mortgages.) | $<1>$ [goto HEQUITY] <br> $<2, \mathrm{D}, \mathrm{R}>$ [Exit block and goto S3A1_CHK1] |
|  |  |  | 1. Yes <br> 2. No |  |
| 03A1 | HEQUITY | HEQUITY | Was this a mortgage or home equity loan? | $\ll 1, \mathrm{D}, \mathrm{R}>$ [goto OTHLOAN] <br> $<2>$ [goto HELTYPE] |
|  |  |  | 1. Mortgage <br> 2. Home Equity loan |  |
| 03A1 | HELTYPE | HELTYPE | There are two basic types of home equity loans: | <1,2, D, R> [goto OTHLOAN] |
|  |  |  | A loan where ^YOU_YRCU received the entire lump-sum borrowed when ^YOU_YRCU took out the loan; or |  |
|  |  |  | A line of credit loan where ^YOU_YRCU can increase the amount borrowed by simply writing a check or using a special credit card. |  |
|  |  |  | Which type more closely describes this new home equity loan? |  |
|  |  |  | 1. Lump sum home equity loan <br> 2. Line of credit home equity loan |  |
| 03A1 | OTHLOAN | OTHLOAN | Did you have any other new mortgages or home equity loans for (property description)? | <1> [goto HEQUITY for the next row] |

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|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ | <2,D,R> [Exit block and goto S3A1_CHK1] |
| 03D | DISPMTHD | DISPMTHD | You said ^YOU_YRCU no longer (own/owns) your (property description). Did ^YOU_YRCU sell it, give it to someone outside your household, or do something else with it? <br> 1. Sold the property or traded the property in <br> 2. Gave it to someone outside household <br> 3. Something else, other - specify | $<1,2, \mathrm{D}, \mathrm{R}>$ [goto DISPYR]  <br> $<3>$ [goto DISPOTH] |
| 03D | DISPOTH | DISPOTH | - Specify: | <30 Characters> [goto DISPYR] |
| 03D | DISPYR | DISPYR | In what year did ^YOU_YRCU (sell( trade) this propertylgive this property to someone outside your CU/dispose of this property)? | <1998-9999,D,R> [goto DISPMO] |
| 03D | DISPMO | DISPMO | In what month did ^YOU_YRCU (sell( trade) this property/give this property to someone outside your CU/dispose of this property)? <br> 1. January <br> 2. February <br> 3. March <br> 4. April <br> 5. May <br> 6. June <br> 7. July <br> 8. August <br> 9. September <br> 10. October <br> 11. November <br> 12. December | $<1-12, \mathrm{D}, \mathrm{R}>$ [IF DISPMO and DISPYR not within the reference period, goto ERR3_DISPMO] <br> [ELSEIF DISPMTHD = 1 AND (DISPMO and DISPYR are within the reference period, goto DISPX] [Else goto S3D_END] |
| 03D | DISPX | DISPX | What was the selling price (trade-in value)? | ```<0-99999999> [IF ENTRY It 750 or gt 399900, goto ERR1_DISPX] [ELSE goto DISPEXPX] <D,R> [goto DISPEXPX]``` |
| 03D | DISPEXPX | DISPEXPX | $\text { [11 } 11 \text { ? } 1$ <br> Here is a list of some of the costs people may have when selling (trading) property. Looking at the list may help you remember what Your Your CU's expenses were. What were Your Your CU's total expenses in selling (trading) this property? | ```<0-99999999> [IF ENTRY 28000 goto ERR1_DISPEXPX] [ELSEIF DISPEXPX gt DISPX goto CK_DISPEXPX] [ELSE goto S3D_END] <D,R> [goto S3D_END]``` |
| 03F | ORG_INTR | ORG_INTR | Now I will ask some questions about your (1st/2nd/3rd/etc.) (mortgage/lump sum home equity loan). These questions refer to the (mortgage/lump sum home equity loan) you are currently making payments on. | $\begin{aligned} & \text { <1> [goto ORGMRTX] } \\ & <2>\text { [goto S3FG_END] } \end{aligned}$ |



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| 03F | MORTTERM | MORTTERM | - Enter number of years | ```<1-50> [IF (current year) - (FRSTPYYR) gt MORTTERM, goto CK_S3FG] [ELSEIF ENTRY It 5 or gt 30, goto ERR1_MORTTERM] [ELSE goto NEWMRRT] <D,R> [goto NEWMRRT]``` |
| 03F | NEWMRRT | NEWMRRT | What is the current interest rate on this (mortgage/lump sum home equity loan)? <br> Enter percent including decimal | ```<00.000-99.999> [IF ENTRY It 4 or gt 14, goto ERR1_NEWMRRT] [ELSE goto FIXEDRTE] <D,R> [goto FIXEDRTE]``` |
| 03F | FIXEDRTE | FIXEDRTE | Is this a fixed rate (mortgagellump sum home equity loan)? <br> 1. Yes <br> 2. No | $<1>$ [goto PAYINCL] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto PAYTYPE] |
| 03F | PAYTYPE | PAYTYPE | There are many different kinds of (mortgage/lump sum home equity loan)(s). Which of these comes closest to Yours Your CU's? <br> - Read each item on list <br> - Mark all that apply, separate with commas <br> 1. Variable or adjustable rate of interest (ARM) <br> 2. Interest only <br> 3. Other - specify | <1-3,D,R> [IF FIXEDRTE $=2$ AND PAYTYPE $=1$, goto CK_PAYTYPE] <br> [ELSEIF precode 3 is selected goto PAYTOTHF] [ELSE goto PAYINCL] |
| 03F | PAYTOTHF | PAYTOTHF | - Specify: | <30 characters> [goto PAYINCL] |
| 03F |  | PAYINCL | [d] [F1] <br> On Your Your CU's last payment, which of these things were included? <br> - Read each item on list <br> - Enter all that apply, separate with commas <br> 1. Principal <br> 2. Interest <br> 3. Property taxes <br> 4. Property insurance <br> 5. Mortgage guarantee insurance | $\begin{array}{cl} \hline<1-6,77, \mathrm{R}> & \text { [IF } 1 \text { and } 2 \text { were not selected, goto } \\ \text { CK_PAYINCL] } \\ & {[\text { ELSEIF } 6 \text { selected, goto PAYOTHF] }} \\ & {[\text { ELSEIF FIXEDRTE }=1 \text { goto MRTPMTX] }} \\ & {[\text { ELSEIF INTNMBR }=2-5 \text { goto PAYMTX1] }} \\ & {[\text { ELSE goto PAYMTX3] }} \end{array}$ |

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| 6. Any other payments-specify 77. Don't know |  |  |  |  |
| 03F | PAYOTHF | PAYOTHF | * Specify: | $<30$ characters> $>$ [IF FIXEDRTE $=1$ goto MRTPMX] <br>  [ELSEIF INTNMBR $=2-5$ goto PAYMTX1] <br>  $[$ ELSE goto PAYMTX3] |
| 03F | MRTPMTX | MRTPMTX | How much is Your Your CU's (mortgagellump sum home equity loan) payment per month? | ```<1-99999999> [IF MRTPMTX gt ORGMRTX goto CK_MRTPMTX] [ELSEIF entry It 125 or gt 2700 goto ERR1_MRTPMTX] [ELSEIF any codes 3-6 are selected in PAYINCL goto PRININTX] [ELSE goto S3FG_END] <D,R> [IF any codes 3-6 are selected in PAYINCL goto PRININTX] [ELSE goto S3FG_END]``` |
| 03F | PRININTX | PRININTX | How much of that amount was for ^prinint_fill? | <0-99999999> [IF PRININTX gt MRTPMTX goto ERR_PRININTX] <br> [ELSEIF entry It 75 or gt 2500 goto ERR1_PRININTX] <br> [ELSE goto S3FG_END] |
|  |  |  |  | <D,R> [goto S3FG_END] |
| 03F | PAYMTX1 | PAYMTX1 | How much was Your Your CU's payment on this (mortgagellump sum home equity loan) in ^REF_MONTH? | <0> [goto PAYMTX2] <br> <1-99999999, D,R> [IF entry It 125 or gt 2700 goto ERR1_PAYMTX1] <br> PAYINCL <br> [ELSEIF any codes 3-6 selected in <br> goto PRNINTX1] <br> [ELSE goto PAYMTX2] |
| 03F | PRNINTX1 | PRNINTX1 | How much of that amount was for ^prinint_fill? | ```<0-99999999> [IF PRNINTX1 gt PAYMTX1 goto CK_PRNINTX1] [ELSEIF entry It 75 or gt 2500 goto ERR1_PRNINTX1] [ELSE goto PAYMTX2] <D,R> [goto PAYMTX2]``` |
| 03F | PAYMTX2 | PAYMTX2 | How much was Your Your CU's payment on this (mortgagellump sum home equity loan) in ^TWO_MONTH? | $<0>$ [goto PAYMTX3]$<1-99999999, D, R>$[IF entry It 125 or gt 2700 goto <br> ERR1_PAYMTX2] <br> [ELSEIF any codes 3-6 selected in <br> PAYINCL <br> goto PRNINTX2] |

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|  |  |  |  | [ELSE goto PAYMTX3] |
| 03F | PRNINTX2 | PRNINTX2 | How much of that amount was for ^prinint_fill? | <0-99999999> [IF PRNINTX2 gt PAYMTX2 goto ERR_PRNINTX2] <br> [ELSEIF entry It 75 or gt 2500 goto ERR1_PRNINTX2] <br> [ELSE goto PAYMTX3] |
|  |  |  |  | <D,R> [goto PAYMTX3] |
| 03F | PAYMTX3 | PAYMTX3 | How much was Your Your CU's payment on this (mortgage/lump sum home equity loan) in ^LAST_MONTH? | ```<0,D,R> [goto S3FG_END] <1-99999999> [IF entry lt 125 or gt 2700 goto ERR1_PAYMTX3] [ELSEIF any codes 3-6 selected in PAYINCL goto PRNINTX3] [ELSE goto S3FG_END]``` |
| 03F | PRNINTX3 | PRNINTX3 | How much of that amount is for ^prinint_fill? | <0-99999999> [IF PRNINTX3 gt PAYMTX3 goto CK_PRNINTX3] <br> [ELSEIF PRNINTX3 It 75 or gt 2500 goto ERR1_PRNINTX3] <br> [ELSE goto S3FG_END] |
|  |  |  |  | <D,R> [goto S3FG_END] |
|  | PAIDLOAN | PAIDLOAN | (I'd like to ask some questions about (yourlyour CUs) line of credit home equity (Ioan/laons).) <br> Since the first of ^REF_MONTH, (have/has) ^YOU_YRCU made any payments for Your Your CU's (this loan/1st/2nd/3rd/etc.)? <br> 1. Yes <br> 2. No <br> 888. Delete this loan | $<1>$ [goto PDAMTX1] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto TOTOWED] <br> $<888>$ [goto next loan] |
| 03 | PDAMTX1 | PDAMTX1 | What was the total amount paid in ^REF_MONTH? | ```<1-99999999> [IF (OWNYB = 100 and PDAMTX1 It 15 or gt 6000) OR (OWNYB \(=200-500\) and PDAMTX1 It 35 or gt 35000) goto ERR1_PDAMTX1 [ELSE goto PDAMTX2] <0,D,R> [goto PDAMTX2]``` |
| 03 | PDAMTX2 | PDAMTX2 | What was the total amount paid in ^TWO_MONTH? | ```<1-99999999> [IF (OWNYB = 100 and PDAMTX2 It 15 or gt 6000) OR (OWNYB = 200-500 and PDAMTX2 It 35 or gt 35000) then goto ERR1_PDAMTX2] [ELSE goto PDAMTX3] <0,D,R> [goto PDAMTX3]``` |

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| 03 | PDAMTX3 | PDAMTX3 | What was the total amount paid in ^LAST_MONTH? | <1-99999999> [IF (OWNYB = 100 and entry It 15 or gt 6000) OR (OWNYB = 200-500 and entry lt 15 or gt 6000) then goto ERR1_PDAMTX3 <br> [ELSE goto TOTOWED] <br> <0,D,R> [goto TOTOWED] |
| 03 | TOTOWED | TOTOWED | How much was owed before the last payment? | <0-99999999> [IF (OWNYB = 100 and entry lt 165 or gt 104400) OR (OWNYB $=200-500$ and entry It 2000 or gt 100000) AND (entry ne 0 )then goto ERR1_TOTOWED] [ELSEIF (entry It PDAMTX3 AND (PDAMTX3 ne D and ne R)) OR (INTNMBR = 1 and entry It PDAMTX1 AND (PDAMTX1 ne D and ne R)) then goto CK_TOTOWNED] [ELSE goto S3H_END] <br> <D,R> [goto S3H_END] |
| 03 | MORTSPEC | MORTSPEC | Now I'm going to ask about other ownership costs for your (property description). <br> Since the first of ^REF_MONTH, have ^YOU_ANYMEM paid more than the amount required on any mortgage or lump sum home equity loan for this property? <br> 1. Yes <br> 2. No | $\begin{array}{ll}<1> & \text { [goto SPECIALX] } \\ <2, \mathrm{D}, \mathrm{R}> & \text { [goto GRNDRENT] }\end{array}$ |
| 03 | SPECIALX | SPECIALX | What was the total amount that ^YOU_YRCU paid extra? | <1-99999999> [If It 8 or gt 14000, goto ERR1_SPECIALX] [ELSE goto SPECLXCM] $<$ [D,R> $\quad$ [goto GRNDRENT] |
| 03 | SPECLXCM | SPECLXCM | How much of that amount was paid this month? | ```<0-99999999> [IF SPECLXCM It 5 or gt 1762 goto ERR1_SPECLXCM] [ELSEIF SPECLXCM gt SPECIALX, goto CK_SPECLXCM] [ELSE goto GRNDRENT] <D,R> [goto GRNDRENT]``` |
| 03 | GRNDRENT | GRNDRENT | (Now I'm going to ask about ownership costs for your ^PROPDESC <br> Since the first of ^REF_MONTH, (have/has) <br> ^YOU_YRCU made any payments for ground or land rent for (property description)? | $<1>$ [goto GRNDRNTX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [If PROPTYPE $=1$ goto PAYCONDO] <br>  [If PROPTYPE $=2$ goto COOPRG3] <br>  [If PROPTYPE $=3$ goto PAYHOASS] |


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|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 03 | GRNDRNTX | GRNDRNTX | What was the total amount paid? | $<$ <1-99999999>$[$ IF GRNDRNTX It 45 or gt 2465 goto <br> ERR1_GRNDRNTX] <br> $[$ ELSE goto GRNDRTCX] |
|  |  |  |  | <D,R $>$ $\left.\begin{array}{c}\text { [If PROPTYPE }=1 \text { goto PAYCONDO] } \\ \text { [If PROPTYPE }=2 \text { goto COOPRG3] } \\ \text { [If PROPTYPE }=3 \text { goto PAYHOASS] }\end{array}\right]$ |
| 03 | GRNDRTCX | GRNDRTCX | How much of that amount was paid this month? | ```<0-99999999> [IF GRNDRTCX \(=1\) - 5 or gt 759 goto ERR1_GRNDRTCX] [ELSEIF GRNDRTCX gt GRNDRNTX goto CK_GRNDRTCX] [ELSEIF PROPTYPE \(=1\) goto PAYCONDO] [ELSEIF PROPTYPE \(=2\) goto COOPRG3] [ELSE goto PAYHOASS]``` |
|  |  |  |  | <D,R> [IF PROPTYPE $=1$ goto PAYCONDO] <br> [IF PROPTYPE $=2$ goto COOPRG3] <br> [IF PROPTYPE $=3$ goto PAYHOASS] |
| 03 | PAYHOASS | PAYHOASS | (Do/Does) ^YOU_YRCU make regular payments to a homeowner's association? | $<1>$ [goto HORCORG] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto SPCLPAY2] |


|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| :---: | :---: | :---: | :---: | :---: |
| 03 | PAYCONDO | PAYCONDO | ^CU_Arels ^YOU_YRCU required to make regular payments of condominium fees for general maintenance or management services? | $\begin{array}{ll}<1> & \text { [goto HORCORG] } \\ <2, \mathrm{D}, \mathrm{R}>\text { [goto SPCLPAY2] }\end{array}$ |


|  |  |  | $\begin{aligned} & \text { 1. Ye } \\ & \text { 2. No } \end{aligned}$ |  |
| :---: | :---: | :---: | :---: | :---: |
| 031 | COOPRG3 | COOPRG3 | [4] 7 ? [F1] | <12,R> [goto SPCLPAY1] |
|  |  |  | Now I'd like to ask you about payments ^YOU_YRCU ^make_makes directly to the cooperative for Your Your CU's share of its costs. <br> Since the first of ^REF_MONTH, have ^YOU_ANYMEM made any payments for any of the following things - <br> Read each item on list. | <1-11,77> [IF 11 selected goto CORGOTH] <br> [ELSEIF there is a LOANTYPE $=1$ for this property <br> goto MGOTHER] <br> [ELSE goto MGOTHERX] |

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|  |  |  | - Enter all that apply, separate with commas. <br> - Enter 12 for No payments made. <br> 1. Repayment of loans owed by cooperative <br> 2. Property taxes <br> 3. Property insurance <br> 4. Management <br> 5. Repairs or maintenance, including lawn care or snow removal <br> 6. Improvements <br> 7. Recreational including swimming, golf or tennis facilities <br> 8. Security including guards or alarm systems <br> 9. Utilities such as gas, electricity, water, heat <br> 10. Trash collection <br> 11. Other <br> 12. No payments made <br> 77. Don't know |  |
| 03 | CORGOTH | CORGOTH | - Specify: | <30 characters> [IF at least one loan of LOANTYPE $=1$ for this property, goto MGOTHER] [ELSE goto MGOTHERX] |
| 031 | HORCORG | HORCORG | [EA 7 ? [F1] <br> Which of the following services and privileges were included in those payments? <br> - Read each item on list <br> - Enter all that apply, separate with commas. <br> 1. Management <br> 2. Repairs or maintenance, including lawn care or snow removal <br> 3. Improvements <br> 4. Utilities such as gas, electricity, water, heat <br> 5. Parking <br> 6. Recreational including swimming, golf, or tennis facilities <br> 7. Security including guards or alarm systems <br> 8. Maid services <br> 9. Medical services <br> 10. Trash collection <br> 11. Other <br> 77. Don't Know | <1-11,77> [IF 11 selected goto HORGOTH] <br> [ELSEIF there is at least one loan of LOANTYPE = 1 on this property, goto MGOTHER] <br> [ELSE goto MGOTHERX] <br> <R> [goto SPCLPAY2] |
| 03 | HORGOTH | HORGOTH | - Specify: | $<30$ characters> [IF at least one loan of LOANTYPE $=1$ for this property, goto MGOTHER] <br> [ELSE goto MGOTHERX] |
| 03 | MGOTHER | MGOTHER | Since the first of ^REF_MONTH, have you made ANY regular payments for these services? | <1,D,R> [goto MGOTHERX] |

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|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ | <2> [IF PROPTYPE $=2$ goto SPCLPAY1] <br>  $[E L S E$ goto SPCLPAY2] |
| 03 | MGOTHERX | MGOTHERX | Since the first of ^REF_MONTH, how much (have/has) ${ }^{\wedge}$ YOU_YRCU paid for these services? | <1-99999999> [IF OWNYB = 100 and MGOTHERX It 10 or <br> gt 2100 goto ERR1_MGOTHERX] <br> [ELSEIF OWNYB = 200-500 and <br> MGOTHERX It 5 or gt 2610 goto ERR1_MGOTHERX] <br> [ELSE goto MGOTHRCX] <br> <0,D,R>[IF PROPTYPE $=2$ goto SPCLPAY1] <br> [ELSE goto SPCLPAY2] |
| 03 | MGOTHRCX | MGOTHRCX | How much of that amount was paid this month? | <0-99999999> [IF OWNYB = D or R and MGOTHRCX = $1-5$ or gt 11000 goto ERR1_MGOTHRCX] <br> [ELSEIF OWNYB = 100 and MGOTHRCX = <br> 1-5 or gt 870 goto ERR1_MGOTHRCX] <br> [ELSEIF OWNYB $=200-500$ and <br> MGOTHRCX $=1-5$ or gt 635 goto ERR1_MGOTHRCX] <br> [ELSEIF MGOTHRCX gt MḠOTHERX, goto <br> CK_MGOTHRCX] <br> [ELSEIF PROPTYPE $=2$ goto SPCLPAY1] <br> [ELSE goto SPCLPAY2] <br> <D,R> [IF PROPTYPE $=2$ goto SPCLPAY1] <br> [ELSE goto SPCLPAY2] |
| 03 | SPCLPAY1 | SPCLPAY1 | [4] 7 <br> (Have/Has) ^YOU_YRCU made any SPECIAL payments to a management service? <br> 1. Yes <br> 2. No | $\begin{array}{lc} \hline<1> & \text { [goto COOPSP3] } \\ <2, \mathrm{D}, \mathrm{R}> & \text { [goto ASSESSMT] } \end{array}$ |
| 03 | SPCLPAY2 | SPCLPAY2 | [d] 7 <br> (Have/Has) ^YOU_YRCU made any SPECIAL payments to a management service? <br> 1. Yes <br> 2. No | $<1>$ [goto HOCOSP3] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto ASSESSMT] |
| 031 | COOPSP3 | COOPSP3 | [4] 7 ? [F1] | <1-11,77,R> [IF 11 is selected goto COSPOTH) |


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| :---: | :---: | :---: | :---: | :---: |
|  |  |  |  | [ELSE goto SPECLX] |
|  |  |  | Since the first of ^REF_MONTH, what services were provided? |  |
|  |  |  | - Enter all that apply, separate with commas |  |
|  |  |  | 1. Rapyment of loans owed by the cooperative |  |
|  |  |  | 2. Property taxes |  |
|  |  |  | 3. Property insurance |  |
|  |  |  | 4. Management |  |
|  |  |  | 5. Repairs or mantainence, including lawn care or snow removal |  |
|  |  |  | 6. Improvements |  |
|  |  |  | 7. Recreational including swimming, golf, or tennis facilitieds |  |
|  |  |  | 8. Security including guards or alarm systems |  |
|  |  |  | 9. Utilities such as gas, electricity, water, heat |  |
|  |  |  | 10. Trash collection |  |
|  |  |  | 11. Other |  |
|  |  |  | 77. Don't Know |  |
| 03 | COSPOTH | COSPOTH | - Specify: | <30 characters> [goto SPECLX] |
| 031 | HOCOSP3 | HOCOSP3 | [147 ? [F1] | $<1-11,77, R>$ $[$ [ELSE goto SPECLX] |
|  |  |  | Since the first of ^REF_MONTH, what services were provided? |  |
|  |  |  | - Enter all that apply, separate with commas |  |

## 1. Management

. Repairs or maintenance, including lawn care or snow removal
3. Improvements
4. Utilities such as gas, electricity, water, heat
5. Parking
. Recreational including swimming, golf, or tennis facilities
7. Security including guards or alarm systems
. Maid services
9. Medical services
10. Trash collection
11. Other
77. Don't Know

| 03 | HOSPOTH | HOSPOTH | - Specify: | <30 characters> [goto SPECLX] |
| :---: | :---: | :---: | :---: | :---: |
| 03 | SPECLX | SPECLX | Since the first of ^REF_MONTH, how much were these special payments? | $\begin{gathered} \text { <1-99999999> [IF SPECLX gt } 6600 \text { goto ERR1_SPECLX] } \\ \text { [ELSE goto SPECLCX] } \end{gathered}$ |

03 SPECLCX $\quad$ SPECLCX How much of that amount was paid this month?

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|  |  |  |  | ```[ELSEIF SPECLCX gt SPECLX gotoNone``` |
| 03 | ASSESSMT | ASSESSMT | Since the first of ^REF_MONTH ^CU_havehas2 <br> $\wedge$ YOU_YRCU paid any special assessments to a local government for construction or repair of roads, sidewalks, or other things like that? <br> 1. Yes <br> 2. No | ```<1> [goto ASSESSX] <2,D,R> [IF OWNYB = 100 goto RNTEQVX] [ELSEIFIF OWNYB = 300 goto VAC_OCCQ] [ELSE goto S3I_END]``` |
| 03 | ASSESSX | ASSESSX | What was the total amount paid? | ```<1-99999999> [IF ASSESSX It 6 or gt 77000 goto ERR1_ASSESSX] [ELSE goto ASSESSCX] <D,R> [IF OWNYB = 100 goto RNTEQVX] [ELSEIF OWNYB = 300 goto VAC_OCCQ] [ELSE goto S3I_END]``` |
| 03 | ASSESSCX | ASSESSCX | How much of that amount was paid this month? | ```<0-99999999> [IF ASSESSCX gt 2058 goto ERR1_ASSESSCX] [ELSEIF ASSESSCX gt ASSESSX goto CK_ASSESSCX] [ELSEIF OWNYB = 100 goto RNTEQVX] [ELSEIF OWNYB = 300 goto VAC_OCCQ] [ELSE goto S3I_END] <D,R> [IF OWNYB = 100 goto RNTEQVX] [ELSEIF OWNYB = 300 goto VAC_OCCQ] [ELSE goto S3I_END]``` |
| 03 | VAC_OCCQ | VAC_OCCQ | Since the first of ^REF_MONTH, how much time did you occupy this (timeshare/property)? <br> - Enter quantity and select period on next screen. | <0,D,R> [IF 8500.TIMESHAR = 2, D or R goto VAC_SEC] [ELSEIF 8500.TIMESHAR = 1 goto TIME_RNT] [ELSE goto S3I_END] <br> <1-150> [goto VAC_OCCY] |
| 03 | VAC_OCCY | VAC_OCCY | Enter time period. <br> 1. Days <br> 2. Weeks <br> 3. Months <br> 4. Percent <br> 5. Other, specify | ```<1-4,D,R> [IF 8500.TIMESHAR = 2, D or R goto VAC_SEC] [ELSEIF 8500.TIMESHAR = 1 goto TIME_RNT] [ELSE goto S3I_END] <5> [goto VAC_OTH]``` |
| 03 | VAC_OTH | VAC_OTH | - Specify: | $<30$ characters,D,R>$[$ IF 8500.TIMESHAR $=2$, D or R goto <br> VAC_SEC] $]$ |

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|  |  |  |  | TIME_RNT] [ELSEIF 8500.TIMESHAR = 1 goto <br>  $[E L S E$ goto S3I_END] |
| 03 | VAC_SEC | VAC_SEC | Since the first of ^REF_MONTH, was this property either rented by someone outside your household or available to be rented? | $\begin{array}{lc} \hline<1> & \text { [goto VAC_RNTQ] } \\ <2, \mathrm{D}, \mathrm{R}> & \text { [goto RNTEQVX] } \end{array}$ |
|  |  |  | 1. Yes <br> 2. No |  |
| 03 | VAC_RNTQ | VAC_RNTQ | Since the first of ^REF_MONTH, how much time was this property rented by someone outside your household? | <0,D,R> [goto VAC_AVAQ] <1-150> [goto VAC_RNTY] |
|  |  |  | - Enter quantity and select period on next screen. |  |
| 03 | VAC_RNTY | VAC_RNTY | - Enter time period. | $<1-4, D, R>$ [goto VAC_AVAQ] <br> $<5>$ [goto VAC_ROTH] |
|  |  |  | 1. Days <br> 2. Weeks <br> 3. Months <br> 4. Percent <br> 5. Other, specify |  |
| 03 | VAC_ROTH | VAC_ROTH | - Specify: | <30 characters, D,R> [goto VAC_AVAQ] |
| 03 | VAC_AVAQ | VAC_AVAQ | Since the first of ^REF_MONTH, how much time was this property available to be rented? <br> Enter quantity and select period on next screen. | ```0,D,R> [IF OWNYB = 300 goto RNTEQV2X] [ELSE goto S3I_END] <1-150> [goto VAC_AVAY]``` |
| 03 | VAC_AVAY | VAC_AVAY | Specify <br> 1. Days <br> 2. Weeks <br> 3. Months <br> 4. Percent <br> 5. Other, specify | ```<1-4,D,R> [IF OWNYB = 300 goto RNTEQV2X] [ELSE goto S3I_END] <5> [goto VAC_AOTH]``` |
| 03 | VAC_AOTH | VAC_AOTH | - Specify | $<30$ characters,D,R> $\quad$ [IF OWNYB $=300$ goto RNTEQV2X] $[$ ELSE goto S3I_END] |
| 03 | RNTEQV2X | RNTEQV2X | If someone were to rent this home today, how much do you think it would rent for? | <1-999999> [IF RNTEQV2X It 200 or gt 800 goto ERR1_RNTEQV2X] <br> [ELSE goto RENTPERD] |

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|  |  |  |  | <D,R> [goto RENTPERD] |
| 03 | RENTPERD | RENTPERD | Ask if not already stated. | $<1-3, \mathrm{D}, \mathrm{R}>$ [goto RENTUTIL] <br> $<4>$ [goto RNPEROTH] |
|  |  |  | What period of time does this rental amount cover? |  |
|  |  |  | 1. Week <br> 2. Month <br> 3. Quarter <br> 4. Other specify |  |
| 03 | RNPEROTH | RNPEROTH | - Specify: | <30 characters> [goto RENTUTIL] |
| 03 | RENTUTIL | RENTUTIL | Does this amount include utilities? | <1,2,D,R> [goto PROPVALX] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 03 | RNTEQVX | RNTEQVX | If someone were to rent this (entire property/home) today, (including part of the property currently being used for business, farming, or rented, ) how much do you think it would rent for monthly, unfurnished and without utilities? | <1-999999> [IF (OWNYB = 100 and RNTEQVX It 300 or gt 3000) OR (OWNYB = 200 and RNTEQVX It 200 or gt 4000) OR (OWNYB $=300$ and RNTEQVX It 200 or gt 8000) goto ERR1_RNTEQVX] <br> [ELSEIF OWNYB = 100 OR (OWNYB = 300 AND 8500.TIMESHAR $=2$, D or R goto PROPVALX] <br> [ELSE goto S3I_END] <br> <D,R> [IF OWNYB = 100 OR (OWNYB $=300$ AND <br> 8500. TIMESHAR $=2$, D or R goto PROPVALX] <br> [ELSE goto S3I_END] |
| 03 | PROPVALX | PROPVALX | About how much do you think this property would sell for on today's market? | ```<0-99999999> [IF OWNYB = 100 and PROPVALX It 1000 or gt 600000 OR (OWNYB \(=300\) and PROPVALX It 3000 or gt 800000) goto ERR1_PROPVALX] [ELSE goto S3I_END] <D,R> [goto S3I_END]``` |
| 03 | TIME_RNT | TIME_RNT | Since the first of ^REF_MONTH, did you rent this timeshare to someone outside your household? <br> 1. Yes <br> 2. No | <1,2,D,R> [goto RNTEQV3X] |
| 03 | RNTEQV3X | RNTEQV3X | If you were to rent this timeshare today to someone else, instead of using it yourself, how much would it rent for weekly? | ```<1-99999> [IF OWNYB = 300 and RNTEQV3X It 200 or gt 8000 goto ERR1_RNTEQV3X] [ELSE goto PRPVAL2X] <D,R> [goto PRPVAL2X]``` |

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| 03 | PRPVAL2X | PRPVAL2X | If you were able to sell this timeshare, about how much do you think it would sell for on today's market? | ```<0-99999999> [IF OWNYB = 300 and PRPVL2X It 3000 or gt 800000 goto ERR1_PRPVL2X] [ELSE goto S3I_END] <D,R> [goto S3I_END]``` |
| 03A1 | PURPROP | PURPROP | (Other than the Sample Unit which you recently acquired) ^SINCEFILL the first of ^REF_MONTH, (have/has) ^YOU_YRCU purchased or otherwise acquired any property or real estate? <br> 1. Yes <br> 2. No | $<1>$ [goto PCODE] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto 3A1_END] |
| 03A1 | PCODE | PCODE | [4 9 <br> What kind of property(ies) is this new property or real estate? <br> Enter all that apply, separate with commas <br> 1. A second home, vacation home, recreational property or timeshare <br> 2. Commercial property for business or investment purposes only <br> 3. Residential property for business or investment purposes only <br> 4. Unimproved land with no buildings on it <br> 5. Other property | <1-5> [if 1 selected goto NPROP2] <br> [if 2 selected goto CK_PCODE] <br> [if 3 selected goto NPROP6] <br> [if 4 selected goto NPROP4] <br> [if 5 selected goto NPROP5] |
| 03A1 | NPROP2 | NPROP2 | [1] 9 ? [F1] <br> How many second homes, vacation homes or recreational properties, including timeshares? <br> Exclude right-to-use timeshares, vacation clubs, or destination clubs. | <1-20> [IF (Section 3A1 has been completed) and (the FR attempts to lower the entry, goto CK_NPROP2) [ELSEIF 3 selected in PCODE, goto NPROP6] [ELSEIF 4 selected in PCODE, goto NPROP4] [ELSEIF 5 selected in PCODE, goto NPROP5] [ELSE goto S3A1_END] |
| 03A1 | NPROP6 | NPROP6 | [4] ?F1 <br> How many residential properties for business or investment purposes only? | $<1-20>$ [IF (Section 3A1 has been completed) and (the FR attempts to lower the entry, goto CK_NPROP6) <br> [ELSEIF 4 selected in PCODE, goto NPROP4] <br> [ELSEIF 5 selected in PCODE, goto NPROP5] <br> [ELSE goto S3A1_END] |
| 03A1 | NPROP4 | NPROP4 | How many were unimproved land with no buildings on it? | <1-20> [IF (Section 3A1 has been completed) and (the FR attempts to lower the entry, goto CK_NPROP4] [ELSEIF 5 selected in PCODE, goto NPROP5] |

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|  |  |  |  | [ELSE goto S3A1_END] |
| 03A1 | NPROP5 | NPROP5 | How many other properties? | <1-20> [IF (Section 3A1 has been completed) and (the FR attempts to lower the entry, goto <br> CK_NPROP5] <br> [ELSE goto S3A1_END] |
| 03A2 | S3_INTRO | S3_INTRO | Now I am going to ask about owned living quarters and other owned real estate. <br> 1. Enter 1 to Continue | <1> [goto BSECT3A2 Block] |
| 03A2 | OTHERHOM | OTHERHOM | Since the first of ^REF_MONTH, (have/has) ^YOU_YRCU lived in any other home that ^YOU_ANYMEM still (own/owns)? <br> 1. Yes <br> 2. No | $<1>$ [goto NOPROP] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto BUSPROP3] |
| 03 | NOPROP | NOPROP | How many? | <1-20,D,R> [IF (Section 3A2 has been completed) AND (the FR attempts to lower the entry), goto CK_NOPROP] <br> [ELSEIF ENTRY gt 5 then goto ERR1_NOPROP] <br> [ELSE goto BUSPROP3] |
| 03 | BUSPROP3 | BUSPROP3 | (Do/Does) ^YOU_YRCU own any commercial property only for business or investment purposes? <br> 1. Yes <br> 2. No | <1,2,D,R> [goto RESBUSPR] |
| 03 | RESBUSPR | RESBUSPR | (In the following questions, please do not include any of the commercial properties ^YOU_YRCU ^own_owns only for business or investment purposes.) <br> (Do/Does) ^YOU_YRCU own any residential property only for business or investment purposes? <br> 1. Yes <br> 2. No | <1> [goto RES_NUM] <2, D,R> [goto SECHOME] |
| 03 | RES_NUM | RES_NUM | How many? | <1-20,D,R> [goto SECHOME] |
| 03 | SECHOME | SECHOME | [W 6 ? [F1] <br> (In the following questions, please do not include any of the properties ^You_YRCU ^own_owns only for | $<1>$ [goto SEC_NUM] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto NOBUILD] |

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|  |  |  | business or investment purposes.) <br> (Other than the property you have already mentioned.) <br> (Do/Does/do/does) ^YOU_YRCU own a second home, vacation home, or recreational property, including timeshares? <br> Exclude right-to-use timeshares, vacation clubs, or destination clubs. |  |
|  |  |  | 1. Yes <br> 2. No |  |
| 03 | SEC_NUM | SEC_NUM | How many? | <1-20,D,R> [IF (Section 3A2 has been completed) AND (the FR attempts to lower the entry), goto CK_SECNUM] <br> [ELSEIF ENTRY gt 5 then goto <br> ERR1_SECNUM] <br> [ELSE goto NOBUILD] |
| 03 | NOBUILD | NOBUILD | Other than property you have already mentioned, ^CU_dodoes2 ^YOU_YRCU own any unimproved land, that is, land without buildings on it? | $<1>$ [goto BUILDNUM] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto OTHREAL] |
|  |  |  | 1. Yes <br> 2. No |  |
| 03 | BUILDNUM | BUILDNUM | How many? | <1-20, D,R> [IF (Section 3A2 has been completed) AND (the FR attempts to lower the entry) goto CK_BUILDNUM] <br> [ELSEIF ENTRY gt 5 then goto <br> ERR1_BUILDNUM] <br> [ELSE goto OTHREAL] |
| 03 | OTHREAL | OTHREAL | (Do/Does) ^YOU_YRCU own any other real estate? Please do not include any properties owned only for business or investment purposes. | $<1>$ [goto OTHNUM] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto NOLONGER] |


|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| :---: | :---: | :---: | :---: | :---: |
| 03 | OTHNUM | OTHNUM | How many? | $<1-20, \mathrm{D}, \mathrm{R}>$ [IF (Section 3A2 has been completed) AND (the FR attempts to lower the entry), goto CK_OTHNUM] |


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|  |  |  |  | [ELSEIF ENTRY gt 5 then goto ERR1_OTHNUM] <br> [ELSE goto NOLONGER] |
| 03 | NOLONGER | NOLONGER | Since the first of ^REF_MONTH, did ^YOU_YRCU own any properties that ^YOU_YRCU no longer (own/owns)? | $<1>$ [goto NUMPRPTY] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto S3A2_END] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 03 | NUMPRPTY | NUMPRPTY | How many different properties? | <1-20> [IF (Section 3A2 has been completed) AND (the FR attempts to lower the entry), goto CK_NUMPRPTY] <br> [ELSEIF ENTRY gt 5 then goto <br> ERR1_NUMPRPTY] <br> [ELSE goto P_TYPE] |
|  |  |  |  | <D,R> [goto S3A2_END] |
| 03 | P_TYPE | P_TYPE | [4] 6 [F1] <br> What type of (property was it/properties were they)? | <1-6> [If NUMPRTY is D, $R$ goto S3A2_END] <br> [If 1 selected in $P$ _TYPE and NUMPRPTY is greater than 1 goto HWMANY1] <br> [If only 1 selected in P_TYPE and NUMPRPTY = 1 |
|  |  |  | 1. A home in which ^YOU_YRCU used to live <br> 2. Commercial property for business or investment purposes only <br> 3. Residential property for business or investment purposes only <br> 4. A second home, vacation home, recreation property, or timeshare <br> 5. Unimproved land with no buildings on it <br> 6. Other property | [If 2 selected in P_TYPE and NUMPRPTY is greater than 1 goto HWMANY2] <br> [If only 2 selected in P_TYPE and NUMPRPTY = 1 goto S3A2_END] <br> [If 3 selected in P_TYPE and NUMPRPTY is greater than 1 goto HWMANY6] <br> [If only 3 selected in P_TYPE and NUMPRPTY = 1 <br> goto S3A2_END] |
|  |  |  |  | [If 4 selected in P_TYPE and NUMPRPTY is greater than 1 goto HWMANY3] <br> [If only 4 selected in P_TYPE and NUMPRPTY = 1 <br> goto S3A2_END] |
|  |  |  |  | [If 5 selected in P_TYPE and NUMPRPTY is greater than 1 goto HWMANY4] <br> [If only 5 selected in P_TYPE and NUMPRPTY = 1 <br> goto S3A2_END] |


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|  |  |  |  | [If 6 selected in P_TYPE and NUMPRPTY is greater than 1 goto HWMANY5] [If only 6 selected in P_TYPE and NUMPRPTY $=1$ goto S3A2_END] |
|  |  |  |  | <R> [goto S3A2_END] |
| 03 | HWMANY1 | HWMANY1 | How many homes in which ^YOU_YRCU used to live did ^YOU_YRCU dispose of since ^REF_MONTH? | <1-9,D,R> [IF (Section 3A2 has been completed) AND <br> (the FR attempts to lower the entry), <br> goto CK_HWMANY1] <br> [ELSEIF 2 selected in P_TYPE goto HWMANY2] [ELSEIF 3 selected in P_TYPE goto HWMANY6] [ELSEIF 4 selected in P_TYPE goto HWMANY3] [ELSEIF 5 selected in P_TYPE goto HWMANY4] [ELSEIF 6 selected in P_TYPE goto HWMANY5] [ELSE goto S3A2_CHK] |
| 03 | HWMANY2 | HWMANY2 | How many commercial business or investment properties did ^YOU_YRCU dispose of since ^REF_MONTH? | <1-9,D,R> [IF (Section 3A2 has been completed) AND (the FR attempts to lower the entry), goto CK_HWMANY2 ] <br> [ELSEIF 3 selected in P_TYPE goto HWMANY6] [ELSEIF 4 selected in P_TYPE goto HWMANY3] [ELSEIF 5 selected in P_TYPE goto HWMANY4] [ELSEIF 6 selected in P_TYPE goto HWMANY5] [ELSE goto S3A2_CHK] |
| 03 | HWMANY6 | HWMANY6 | How many residential business or investment properties did ^YOU_YRCU dispose of since ^REF_MONTH? | $\begin{gathered} \hline<1-9, \mathrm{D}, \mathrm{R}> \\ \begin{array}{c} \text { [IF (Section 3A2 has been completed) AND } \\ \text { (the FR attempts to lower the entry), } \\ \text { goto CK_HWMANY6] } \end{array} \\ {[\text { [ELSEIF } 4 \text { selected in P_TYPE goto HWMANY3] }} \\ \text { [ELSEIF } 5 \text { selected in P-TYPE goto HWMANY4] } \\ \text { [ELSEIF } 6 \text { selected in P-TYPE goto HWMANY5] } \\ \text { [ELSE goto S3A2_CHK] } \end{gathered}$ |
| 03 | HWMANY3 | HWMANY3 | How many second homes, vacation homes, recreational properties, or timeshares did ^YOU_YRCU dispose of since ^REF_MONTH? | <1-9,D,R> [IF (Section 3A2 has been completed) AND (the FR attempts to lower the entry), goto CK_HWMANY3] [ELSEIF 5 selected in P_TYPE goto HWMANY4] [ELSEIF 6 selected in P_TYPE goto HWMANY5] [ELSE goto S3A2_CHK] |
| 03 | HWMANY4 | HWMANY4 | How many unimproved land properties did ^YOU_YRCU dispose of since ^REF_MONTH? | $<1-9, \mathrm{D}, \mathrm{R}>$ [IF (Section 3A2 has been completed) AND <br> (the FR attempts to lower the entry), <br> goto CK_HWMANY4] <br> $[$ [ELSEIF 6 selected in P_TYPE goto HWMANY5]  <br> $[$ ELSE goto S3A2_CHK]  |

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| 03 | HWMANY5 | HWMANY5 | How many other properties did ^YOU_YRCU dispose of since ^REF_MONTH? | ```<1-9,D,R> [IF (Section 3A2 has been completed) AND (the FR attempts to lower the entry), goto CK_HWMANY5] [ELSE goto S3A2_CHK]``` |
| 03B | WHICH_PROP | WHICH_PROP | (Now I am going to ask some questions about your owned properties./ Now I'm going to ask about your next property.) <br> Enter type of property <br> 1. Sample unit <br> 2. Former Home <br> 3. Vacation prop, Second home, Recreational property <br> 4. Unimproved land <br> 5. Residential business property <br> 6. Other property | $\begin{array}{ll} \hline<1> & \text { [goto CK_WHICHPROP] } \\ <2-6> & \text { [goto PROPDESC] } \end{array}$ |
| 03B | PROPDESC | PROPDESC | (Now I'm going to ask some questions about your Sample Unit.) <br> ("* Briefly describe the (property type).) <br> (* Press Enter to continue./* Enter 888 to delete this property.) | ```<30 characters> [IF OWNYB = 300 goto TIMESHAR] [ELSEIF OWNYB = 600 goto COUNTRY] [ELSE goto SHARED2] <888> [goto next property]``` |
| 03B | TIMESHAR | TIMESHAR | ? [F1] <br> Is this a time-sharing arrangement where ^YOU_YRCU (have/has) use of the property only for a specified time each year? <br> 1. Yes <br> 2. No | $\begin{array}{lc} \hline<1> & \text { [goto SHARWKS] } \\ <2> & \text { [goto SHARED2] } \end{array}$ |
| 03 | SHARWKS | SHARWKS | How many weeks per year can ^YOU_YRCU use your timeshare? | <1-52,D,R> [goto SHARED1] |
| 03B | SHARED1 | SHARED1 | (Do/Does) ^YOU_YRCU own the timeshare with anyone else outside your household? <br> 1. Yes <br> 2. No | $\begin{aligned} & \hline<1>\quad \text { [goto SHARPER1] } \\ & <2, \mathrm{D}, \mathrm{R}>\text { [goto COUNTRY] } \end{aligned}$ |
| 03B | SHARPER1 | SHARPER1 | What percent of the timeshare ^CU_dodoes ${ }^{\wedge}$ ^YOU_YRCU own? | <1-99, D,R> [goto COUNTRY] |
| 03B | SHARED2 | SHARED2 | (DolDoes) ^YOU_YRCU share ownership of the property with anyone else? | ```\(<1>\) [goto SHARPER2] <2,D,R> [IF OWNYB = 300, goto COUNTRY] [ELSEIF INTNMBR = 2-5 and NEWCU ne 1 AND``` |

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|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ | OWNYB ne 100 goto STILOWNB] <br> [ELSE goto BSNSEXP] |
| 03B | SHARPER2 | SHARPER2 | What percentage of the property ^${ }^{\wedge} \mathrm{CU}$ _dodoes ${ }^{\wedge}$ ^YOU_YRCU own? | <1-99,D,R> [IF OWNYB = 300, goto COUNTRY] <br> [ELSEIF INTNMBR = 2-5 AND NEWCU ne 1 <br> AND OWNYB ne 100 goto STILOWNB] <br> [ELSE goto BSNSEXP] |
| 03B | COUNTRY | COUNTRY | Ask if not apparent <br> - If this is a timeshare with multiple locations, select the most often used location. <br> Where is the property located? | <1> [goto STATE] <br> <2, D,R> [IF INTNMBR = 2-5 AND NEWCU ne 1 and OWNYB ne 100 goto STILOWNB] [ELSE goto BSNSEXP] |
|  |  |  | 1. United States <br> 2. Foreign Country |  |
| 03B | STATE | STATE | ? F1 <br> Enter the two character State abbreviation | <2 character state abbreviation, D,R> [goto CNTYCODE] |
| 03B | CNTYCODE | CNTYCODE | What county is the property located in? <br> - If the county name is not found, key $X$. | $<30$ characters, D,R> [IF INTNMBR = 2-5 AND NEWCU ne 1 AND OWNYB ne 100 goto STILOWNB] [ELSE goto BSNSEXP] |
| 03B | OTHCNTY | OTHCNTY | - Specify other county | $\begin{aligned} & <X>\text { [goto OTHCNTY] } \\ & \hline<30 \text { characters }>\text { [IF INTNMBR }=2-5 \text { AND NEWCU ne } 1 \\ & \text { AND OWNYB ne } 100 \text { goto STILOWNB] } \\ & \quad[\text { ELSE goto BSNSEXP] } \\ & \hline \end{aligned}$ |
| 03B | STILOWNB | STILOWNB | Ask if not apparent <br> Do you still own this property? <br> 1. Yes <br> 2. No | $<1,2, \mathrm{D}, \mathrm{R}>$ IF OWNYB=600 goto S3B_END ELSE [goto BSNSEXP] <br> ELSE [goto BSNSEXP] |
| 03B | BSNSEXP | BSNSEXP | (Are/Were) any of the expenses for this property deducted as a farm, rental, or business expense? <br> 1. Yes <br> 2. No | $<1>$ [goto OBSNSZB] <br> $<2, \mathrm{D}, \mathrm{R}>$ [If OWNYB $=100$ goto BSNEXP2] <br>  [ELSE goto ACQUIRYR] |
| 03B | OBSNSZB | OBSNSZB | What percent of the expenses for this property ^is_was2 deducted? Include the portion used for business, farming, or rented to someone outside the household. | $<1-99, \mathrm{D}, \mathrm{R}>$ [goto ACQUIRYR] <br> $<100>$ [goto ERR2_OBSNSZB] |
| 03B | BSNEXP2 | BSNEXP2 | Is any part of this property you own rented to someone outside your houshold or used for business? <br> 1. Yes | <1,2,D,R> [goto ACQUIRYR] |

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| 2. No |  |  |  |  |
| 03B | ACQUIRYR | ACQUIRYR | In what year did ^YOU_YRCU close or settle on this property? | <1900-9999,D,R> [goto ACQUIRMO] |
| 03B | ACQUIRMO | ACQUIRMO | In what month did ^YOU_YRCU close or settle on this property? <br> 1. January <br> 2. February <br> 3. March <br> 4. April <br> 5. May <br> 6. June <br> 7. July <br> 8. August <br> 9. September <br> 10. October <br> 11. November <br> 12. December | $<1$-12> [IF ACQUIRMO and ACQUIRYR are in the future, then goto CK_ACQUIRMO] <br> [ELSEIF ACQUIRMO/ACQUIRYR are within the reference period, goto GIFTPROP] <br> [ELSE goto ANPROPTX] <br> <D,R> [goto GIFTPROP] |
| 03B | GIFTPROP | GIFTPROP | Was this property received as a gift or inheritance? | $\left.\begin{array}{ll}<1, \mathrm{D}, \mathrm{R}> & \text { [goto ANPROPTX] } \\ <2> & \text { [goto OWN_PURX] }\end{array}\right]$ |
| $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |  |  |  |
| 03B | OWN_PURX | OWN_PURX | [4] ? [F1] <br> What was the total price paid for ^this_the property, not including closing costs? Closing costs include the kinds of things listed on page 6. | <0-99999999 > [IF (OWNYB = 100-300 and OWN_PURX It 1500 or gt 485000) OR (OWNYB $=400$ and OWN_PURX It 100 or gt 250000) OR (OWNYB $=500$ and OWN_PURX It 1500 or gt 500000) then goto ERR1_OWNPURX] <br> [ELSE goto CLOSECST̄] |
|  |  |  |  | <D,R> [goto CLOSECST] |
| 03B | CLOSECST | CLOSECST | [1] 6 ? [F1] <br> About how much were the closing costs? | <0-99999999> [IF CLOSECST gt OWN_PURX then goto CK_CLOSECST] <br> [ELSEIF CLOSECST gt 17000 then goto ERR1_CLOSCST] <br> [ELSE goto OWNDPMTX] |
|  |  |  |  | <D,R> [got OWNDPMTX] |
| 03B | OWNDPMTX | OWNDPMTX | What was the amount of the down payment? | <0-99999999> [IF gt OWN_PURX then goto CK_OWNDPMTX] <br> [ELSEIF OWNDPMTX gt 185000 then goto ERR1_OWNDPMTX] <br> [ELSE goto ANPROPTX] |

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| 03B | ANPROPTX | ANPROPTX | What ^arewere2 the annual property taxes for ^this_the property? | <0-99999999> [IF (OWNYB = 100 and ANPROPTX gt 15000) OR (OWNYB = 200 and ANPROPTX gt 8000) OR (OWNYB $=300$ and ANPROPTX gt 7000) OR (OWNYB = 400 and ANPROPTX gt 3000) OR (OWNYB $=500$ and ANPROPTX gt 11000) then goto ERR1_ANPROPTX] [ELSEIF OWNYB $=400$ goto S3B_END] <br> [ELSEIF OWNYB ne 400 AND NOT (OWNYB = <br> 100 AND BUILDING (from Section 1C) $=1,9,10$ ) goto PROPTYPE] <br> [ELSE goto S3B_END] <br> <D,R> [IF OWNYB = 400 goto S3B_END] <br> [ELSEIF OWNYB ne 400 AND NOT (OWNYB = 100 <br> AND BUILDING (from Section 1C) $=1,9,10$ ) goto PROPTYPE] <br> [ELSE goto S3B_END] |
| 03B | PROPTYPE | PROPTYPE | 4 Ask if not apparent. <br> - If respondent doesn't know or refuses select pre-code 3. <br> ^Is_Was this property a - <br> 1. Condominium <br> 2. Cooperative <br> 3. Something else | <1-3> [goto S3B_END] |
| 03D | DISPMTHD | DISPMTHD | You said ^YOU_YRCU no longer (own/owns) your (property description). Did ^YOU_YRCU sell it, give it to someone outside your household, or do something else with it? <br> 1. Sold the property or traded the property in <br> 2. Gave it to someone outside household <br> 3. Something else, other - specify | $\begin{aligned} & \hline<1,2, \mathrm{D}, \mathrm{R}> \\ & <3> \\ & <\text { [goto DISPYR] } \\ & \text { [goto DISPOTH] } \end{aligned}$ |
| 03D | DISPOTH | DISPOTH | - Specify: | <30 Characters> [goto DISPYR] |
| 03D | DISPYR | DISPYR | In what year did ^YOU_YRCU (sell( trade) this property/give this property to someone outside your CU/dispose of this property)? | <1998-9999,D,R> [goto DISPMO] |
| 03D | DISPMO | DISPMO | In what month did ^YOU_YRCU (sell( trade) this property/give this property to someone outside your CU/dispose of this property)? <br> 1. January <br> 2. February <br> 3. March <br> 4. April <br> 5. May | $<1-12, \mathrm{D}, \mathrm{R}>$ [IF DISPMO and DISPYR not within the reference period, goto ERR3_DISPMO] <br> [ELSEIF DISPMTHD = 1 AND (DISPMO and DISPYR are within the reference period, goto DISPX] <br> [Else goto S3D_END] <br> IF intnmbr $=1$ THEN <br> IF ((DISPMO = last_monthnum) OR (DISPMO = |



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|  |  |  |  | OR(Disposed of this month and this year\} <br> $\quad($ (DISPMO $=$ Interviewdate.MONTH $)$AND (DISPYR $=$ Currentyear) $)$ THEN do NOT display the <br> error <br> ELSE Display the error message |
| 03D | DISPX | DISPX | What was the selling price (trade-in value)? | ```<0-99999999> [IF ENTRY It 750 or gt 399900, goto ERR1_DISPX] [ELSE goto DISPEXPX] <D,R> [goto DISPEXPX]``` |
| 03D | DISPEXPX | DISPEXPX | $\text { [1] } 11 \text { ? } 1$ <br> Here is a list of some of the costs people may have when selling (trading) property. Looking at the list may help you remember what Your Your CU's expenses were. What were Your Your CU's total expenses in selling (trading) this property? | ```<0-99999999> [IF ENTRY 28000 goto ERR1_DISPEXPX] [ELSEIF DISPEXPX gt DISPX goto CK_DISPEXPX] [ELSE goto S3D_ENDD] <D,R> [goto S3D_END]``` |
| 03E | PRESMORT | PRESMORT | Now I am going to ask about mortgages for your (property description). <br> Excluding home equity loans, (and reverse mortgagesl ), ^CU_dodoes2^YOU_YRCU presently have a mortgage on your (property description)? | $<1>$ [goto NUMMORT1] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto HADMORT] |
|  |  |  | 1. Yes <br> 2. No |  |
| 03E | NUMMORT1 | NUMMORT1 | How many mortgages (have/has) ^YOU_YRCU had on this property since the first of ^REF_MONTH? | <1-8,D,R> [IF (Section 3E has been completed) AND (the FR attempts to lower the entry) then goto CK_NUMMORT1] <br> [ELSE goto HOMEQ_YN] |
| 03E | HADMORT | HADMORT | (Have/Has) ^YOU_YRCU had a mortgage on this property since the first of ^REF_MONTH? | $\begin{array}{ll}<1> & \text { [goto NUMMORT2] } \\ <2, \mathrm{D}, \mathrm{R}> & \text { [goto HOMEQ_YN] }\end{array}$ |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 03E | NUMMORT2 | NUMMORT2 | How many mortgages (have/has) ^YOU_YRCU had on this property since the first of $\wedge$ REF_MONTH? | <1-8,D,R> [IF (Section 3E has been completed) AND (the FR attempts to lower the entry) then goto CK_NUMMORT2] <br> [ELSE goto HOMEQ_YN] |
| 03E | MRTCPSHA | MRTCPSHA | Since the first of ^REF_MONTH, in addition to Your Your CU's share of the cooperative's total costs, did ^YOU_YRCU make payments on a mortgage | $<1>$ [goto NUMMORT3] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto HOMEQ_YN] |

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|  |  |  | that was obtained from an outside lender for Your Your CU's shares in the cooperative? |  |
|  |  |  | 1. Yes <br> 2. No |  |
| 03E | NUMMORT3 | NUMMORT3 | How many mortgages (have/has) ^YOU_YRCU had on this property since the first of $\wedge$ REF_MONTH? | <1-8,D,R> [IF (Section 3E has been completed) AND (the FR attempts to lower the entry) then goto CK_NUMMORT3] <br> [ELSE goto HOMEQ_YN] |
| 03E | HOMEQ_YN | HOMEQ_YN | (DolDoes) ^YOU_YRCU have a home equity loan or any other loan which gives the lender claim on this property in case the loan is not repaid? | $<1>$ [goto LSHEL_YN] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto S3E_END] |
|  |  |  | 1. Yes <br> 2. No |  |
| 03E | LSHEL_YN | LSHEL_YN | (There are two basic types of home equity loans. I'll describe both types. - A loan where ^YOU_YRCU received the entire lump-sum borrowed when ^YOU_YRCU took out the loan; or - A line of credit loan where ^YOU_YRCU can increase the amount borrowed by simply writing a check or using a special credit card.) <br> (Have/Has) ^YOU_YRCU had a lump sum home equity loan on this property since the first of $\wedge$ REF_MONTH? | $<1>$ [got NUMLSHEL] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto LCHEL_YN] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 03E | NUMLSHEL | NUMLSHEL | How many? | <1-8,D,R> [IF (Section 3E has been completed) AND (the FR attempts to lower the entry) then goto CK_NUMLSHEL] <br> [ELSE goto LCHEL_YN] |
| 03E | LCHEL_YN | LCHEL_YN | (Have/Has) ^YOU_YRCU had a line of credit home equity loan on this property since the first of ^REF_MONTH? <br> 1. Yes <br> 2. No | $<1>$ [goto NUMLCHEL] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto S3E_END] |
| 03E | NUMLCHEL | NUMLCHEL | How many? | $<1-6, \mathrm{D}, \mathrm{R}>$ [IF (section 3E has been completed) AND (the FR attempts to lower the entry) then goto CK_NUMLCHEL] [ELSE goto S3E_END] |

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| 03F | ORG_INTR | ORG_INTR | Now I will ask some questions about your (1st/2nd/3rd/etc.) (mortgage/lump sum home equity loan). These questions refer to the (mortgagellump sum home equity loan) you are currently making payments on. <br> 1. Continue <br> 2. Delete the loan | $\begin{array}{ll} \hline<1> & \text { [goto ORGMRTX] } \\ <2> & \text { [goto S3FG_END] } \end{array}$ |
| 03F | ORGMRTX | ORGMRTX | What was the amount of the (mortgage/lump sum home equity loan) when ^YOU_YRCU first obtained it, not including any interest? | <1-99999999> [IF (OWNYB = 100 and ORGMRTX It 5000 or gt 315000) OR (OWNYB = 200 and ORGMRTX It 3000 or gt 350000) OR (OWNYB $=300$ and ORGMRTX It 3000 or gt 400000) OR (OWNYB $=400$ and ORGMRTX It 1000 or gt 124900) OR (OWNYB = 500 and ORGMRTX It 2000 or gt 300000) goto ERR1_ORGMRTX] [ELSE goto FRSTPYYR] <br> <D,R> [goto FRSTPYYR] |
| 03F | FRSTPYYR | FRSTPYYR | In what year did ^YOU_YRCU make the first payment on this (mortgagellump sum home equity loan)? | ```<1900-9999> [IF gt 2010 or It 1970, goto ERR1_FRSTPYYR] [ELSE goto FRSTPYMO] <D,R> [goto FRSTPYMO]``` |
| 03F | FRSTPYMO | FRSTPYMO | In what month did ^YOU_YRCU make the first payment on this (mortgagellump sum home equity loan)? <br> 1. January <br> 2. February <br> 3. March <br> 4. April <br> 5. May <br> 6. June <br> 7. July <br> 8. August <br> 9. September <br> 10. October <br> 11. November <br> 12. December | <1-12, D,R> [IF FRSTPYYR and FRSTPYMO are gt (current month + 2 and year) then goto CK_FRPSTYMO] <br> [ELSE MTERM] |
| 03F | MTERM | MTERM | Is this a 30 year (mortgagellump sum home equity loan), a 15 year (mortgage/lump sum home equity loan), or something else? <br> 1. 30-year <br> 2. 15-year <br> 3. Something else | ```<1> [IF (current year) - (FRSTPYYR) gt 30, goto CK_S3FG] [ELSE goto NEWMRRT] <2> [IF (current year) - (FRSTPYYR) gt 15, goto CK_S3FG] [ELSE goto NEWMRRT] <3> [goto MORTTERM]``` |

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|  |  |  |  | <D,R> [goto NEWMRRT] |
| 03F | MORTTERM | MORTTERM | - Enter number of years | ```<1-50> [IF (current year) - (FRSTPYYR) gt MORTTERM, goto CK_S3FG] [ELSEIF ENTRY It 5 or gt 30, goto ERR1_MORTTERM] [ELSE goto NEWMRRT] <D,R> [goto NEWMRRT]``` |
|  |  |  |  |  |
| 03F | NEWMRRT | NEWMRRT | What is the current interest rate on this (mortgage/lump sum home equity loan)? <br> Enter percent including decimal | <00.000-99.999> [IF ENTRY It 4 or gt 14, goto ERR1_NEWMRRT] <br> [ELSE goto FIXEDRTE] |
|  |  |  |  | <D,R> [goto FIXEDRTE] |
| 03F | FIXEDRTE | FIXEDRTE | Is this a fixed rate (mortgage/lump sum home equity loan)? <br> 1. Yes <br> 2. No | $<1>$ [goto PAYINCL] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto PAYTYPE] |
| 03F | PAYTYPE | PAYTYPE | There are many different kinds of (mortgage/lump sum home equity loan)(s). Which of these comes closest to Yours Your CU's? <br> 4 Read each item on list <br> 4 Mark all that apply, separate with commas <br> 1. Variable or adjustable rate of interest (ARM) <br> 2. Interest only <br> 3. Other - specify | <1-3,D,R> [IF FIXEDRTE $=2$ AND PAYTYPE $=1$, goto CK_PAYTYPE] <br> [ELSEIF precode 3 is selected goto PAYTOTHF] [ELSE goto PAYINCL] |
| 03F | PAYTOTHF | PAYTOTHF | - Specify: | <30 characters> [goto PAYINCL] |
| 03F |  | PAYINCL | [17 [F1] <br> On Your Your CU's last payment, which of these things were included? <br> - Read each item on list <br> - Enter all that apply, separate with commas <br> 1. Principal <br> 2. Interest <br> 3. Property taxes | <1-6,77,R> [IF 1 and 2 were not selected, goto CK_PAYINCL] <br> [ELSEIF 6 selected, goto PAYOTHF] <br> [ELSEIF FIXEDRTE $=1$ goto MRTPMTX] <br> [ELSEIF INTNMBR $=2-5$ goto PAYMTX1] <br> [ELSE goto PAYMTX3] |

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|  |  |  | 4. Property insurance <br> 5. Mortgage guarantee insurance <br> 6. Any other payments-specify <br> 77. Don't know |  |
| 03F | PAYOTHF | PAYOTHF | - Specify: | $<30$ characters> [IF FIXEDRTE $=1$ goto MRTPMX] <br>  [ELSEIF INTNMBR $=2-5$ goto PAYMTX1] <br>  $[$ ELSE goto PAYMTX3] |
| 03F | MRTPMTX | MRTPMTX | How much is Your Your CU's (mortgagellump sum home equity loan) payment per month? | ```<1-99999999> [IF MRTPMTX gt ORGMRTX goto CK_MRTPMTX] [ELSEIF entry It 125 or gt 2700 goto ERR1_MRTPMTX] [ELSEIF any codes 3-6 are selected in PAYINCL goto PRININTX] [ELSE goto S3FG_END] <D,R> [IF any codes 3-6 are selected in PAYINCL goto PRININTX] [ELSE goto S3FG_END]``` |
| 03F | PRININTX | PRININTX | How much of that amount was for ^prinint_fill? | <0-99999999> [IF PRININTX gt MRTPMTX goto ERR_PRININTX] <br> [ELSEIF entry It 75 or gt 2500 goto ERR1_PRININTX] <br> [ELSE goto S3FG_END] |
|  |  |  |  | <D,R> [goto S3FG_END] |
| 03F | PAYMTX1 | PAYMTX1 | How much was Your Your CU's payment on this (mortgagellump sum home equity loan) in ^REF_MONTH? | <0> [goto PAYMTX2] <br> <1-99999999, D,R> [IF entry It 125 or gt 2700 goto <br> ERR1_PAYMTX1] <br> [ELSEIF any codes 3-6 selected in <br> PAYINCL <br> goto PRNINTX1] <br> [ELSE goto PAYMTX2] |
| 03F | PRNINTX1 | PRNINTX1 | How much of that amount was for ^prinint_fill? | ```<0-99999999> [IF PRNINTX1 gt PAYMTX1 goto CK_PRNINTX1] ERR1_PRNINTX1] [ELSEIF entry It 75 or gt 2500 goto [ELSE goto PAYMTX2] <D,R> [goto PAYMTX2]``` |
| 03F | PAYMTX2 | PAYMTX2 | How much was Your Your CU's payment on this (mortgagellump sum home equity loan) in ^TWO_MONTH? | $<0>$ [goto PAYMTX3] $<1-99999999, D, R>$ [IF entry It 125 or gt 2700 goto ERR1_PAYMTX2] [ELSEIF any codes 3-6 selected in |

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|  |  |  |  | PAYINCL goto PRNINTX2] <br>  [ELSE goto PAYMTX3] |
| 03F | PRNINTX2 | PRNINTX2 | How much of that amount was for ^prinint_fill? | <0-99999999> [IF PRNINTX2 gt PAYMTX2 goto ERR_PRNINTX2] <br> [ELSEIF entry lt 75 or gt 2500 goto ERR1_PRNINTX2] <br> [ELSE goto PAYMTX3] |
|  |  |  |  | <D,R> [goto PAYMTX3] |
| 03F | PAYMTX3 | PAYMTX3 | How much was Your Your CU's payment on this (mortgagellump sum home equity loan) in ^LAST_MONTH? | ```<0,D,R> [goto S3FG_END] <1-99999999> [IF entry It 125 or gt 2700 goto ERR1_PAYMTX3] [ELSEIF any codes 3-6 selected in PAYINCL goto PRNINTX3] [ELSE goto S3FG_END]``` |
| 03F | PRNINTX3 | PRNINTX3 | How much of that amount is for ^prinint_fill? | ```<0-99999999> [IF PRNINTX3 gt PAYMTX3 goto CK_PRNINTX3] [ELSEIF PRNINTX3 It 75 or gt 2500 goto ERR1_PRNINTX3] [ELSE goto S3FG_END]``` |
|  |  |  |  | <D,R> [goto S3FG_END] |
|  | PAIDLOAN | PAIDLOAN | (I'd like to ask some questions about (yourlyour CUs) line of credit home equity (loan/laons).) <br> Since the first of ${ }^{\wedge}$ REF_MONTH, (have/has) ^YOU_YRCU <br> made any payments for Your Your CU's (this loan/1st/2nd/3rd/etc.)? <br> 1. Yes <br> 2. No <br> 888. Delete this loan | $<1>$ [goto PDAMTX1] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto TOTOWED] <br> $<888>$ [goto next loan] |
| 03 | PDAMTX1 | PDAMTX1 | What was the total amount paid in ^REF_MONTH? | <1-99999999> [IF (OWNYB = 100 and PDAMTX1 It 15 or gt 6000) OR (OWNYB = 200-500 and PDAMTX1 It 35 or gt 35000) goto ERR1_PDAMTX1 <br> [ELSEIF INTNMBR = 1 goto TOTOWED] <br> [ELSE goto PDAMTX2] <br> <O,D,R> [IF INTNMBR = 1 goto TOTOWED] <br> [ELSE goto PDAMTX2] |
| 03 | PDAMTX2 | PDAMTX2 | What was the total amount paid in ^TWO_MONTH? | <1-99999999> [IF (OWNYB = 100 and PDAMTX2 It 15 or gt 6000) OR (OWNYB $=200-500$ and PDAMTX2 It 35 or gt 35000) then goto ERR1_PDAMTX2] |

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|  |  |  | made any payments for any of the following things - <br> Read each item on the list <br> Enter all that apply, separate with commas <br> Enter 12 for no payments made | [ELSE goto MGOTHERX] |
|  |  |  | 1. Repayment of loans owed by cooperative <br> 2. Property taxes <br> 3. Property insurance <br> 4. Management <br> 5. Repairs or maintenance, including lawn care or snow removal <br> 6. Improvements <br> 7. Recreational including swimming, golf or tennis facilities <br> 8. Security including guards or alarm systems <br> 9. Utilities such as gas, electricity, water, heat <br> 10. Trash collection <br> 11. Other <br> 12. No payments made <br> 77. Don't know |  |
| 03 | CORGOTH | CORGOTH | - Specify: | <30 characters> [IF at least one loan of LOANTYPE $=1$ for this property, goto MGOTHER] [ELSE goto MGOTHERX] |
| 031 | HORCORG | HORCORG | [A] 7 ? [F1] <br> Which of the following services and privileges were included in those payments? <br> - Read each item on the list. <br> - Enter all that apply---separate with commas. <br> 1. Management <br> 2. Repairs or maintenance, including lawn care or snow removal <br> 3. Improvements <br> 4. Utilities such as gas, electricity, water, heat <br> 5. Parking <br> 6. Recreational including swimming, golf, or tennis facilities <br> 7. Security including guards or alarm systems <br> 8. Maid services <br> 9. Medical services <br> 10. Trash collection <br> 11. Other <br> 77. Don't Know | <1-11,77> [IF 11 selected goto HORGOTH] <br> [ELSEIF there is at least one loan of LOANTYPE = 1 on this property, goto MGOTHER] <br> [ELSE goto MGOTHERX] <br> <R> [goto SPCLPAY2] |
| 03 | HORGOTH | HORGOTH | - Specify: | <30 characters> [IF at least one loan of LOANTYPE $=1$ for |

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|  |  |  |  | this property, goto MGOTHER] [ELSE goto MGOTHERX] |
| 03 | MGOTHER | MGOTHER | Since the first of ^REF_MONTH, have you made ANY regular payments for these services? | <1,D,R> [goto MGOTHERX] |
|  |  |  |  | $<2>\quad$ [IF PROPTYPE $=2$ goto SPCLPAY1] |
|  |  |  | 1. Yes <br> 2. No |  |
| 03 | MGOTHERX | MGOTHERX | Since the first of ^REF_MONTH, how much (have/has) ${ }^{\wedge}$ YOU_YRCU paid for these services? | <1-99999999> [IF OWNYB = 100 and MGOTHERX It 10 or gt 2100 goto ERR1_MGOTHERX] <br> [ELSEIF OWNYB $=200-500$ and MGOTHERX It 5 or gt 2610 goto ERR1_MGOTHERX] <br> [ELSE goto MḠOTHRCX] |
|  |  |  |  | <0, D,R> [IF PROPTYPE $=2$ goto SPCLPAY1] [ELSE goto SPCLPAY2] |
| 03 | MGOTHRCX | MGOTHRCX | How much of that amount was paid this month? | <0-99999999> [IF OWNYB = D or R and MGOTHRCX = $1-5$ or gt 11000 goto ERR1_MGOTHRCX] <br> [ELSEIF OWNYB $=100$ and MGOTHRCX $=1-5$ or gt 870 goto ERR1_MGOTHRCX] <br> [ELSEIF OWNYB $=200-500$ and MGOTHRCX $=$ 1-5 or gt 635 goto ERR1_MGOTHRCX] <br> [ELSEIF MGOTHRCX gt MGOTHERX, goto CK_MGOTHRCX] <br> [ELSEIF PROPTYPE $=2$ goto SPCLPAY1] <br> [ELSE goto SPCLPAY2] |
|  |  |  |  | $\begin{gathered} \text { <D,R> [IF PROPTYPE }=2 \text { goto SPCLPAY1] } \\ \text { [ELSE goto SPCLPAY2] } \\ \hline \end{gathered}$ |
| 03 | SPCLPAY1 | SPCLPAY1 | [स] 7 <br> (Have/Has) ^YOU_YRCU made any SPECIAL payments to a management service? | $\begin{array}{lc} \hline<1> & \text { [goto COOPSP3] } \\ <2, \mathrm{D}, \mathrm{R}> & \text { [goto ASSESSMT] } \end{array}$ |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2 No } \end{aligned}$ |  |
| 03 | SPCLPAY2 | SPCLPAY2 | [स] 7 <br> (Have/Has) ^YOU_YRCU made any SPECIAL payments to a management service? | $\begin{array}{ll} \hline<1> & \text { [goto HOCOSP3] } \\ <2, \mathrm{D}, \mathrm{R}> & \text { [goto ASSESSMT] } \end{array}$ |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 031 | COOPSP3 | COOPSP3 | $\text { [A] } 7 \text { ? [F1] }$ <br> Since the first of ^REF_MONTH, what services were provided? <br> Enter all that apply, separate with commas <br> 1. Rapyment of loans owed by the cooperative <br> 2. Property taxes <br> 3. Property insurance <br> 4. Management <br> 5. Repairs or mantainence, including lawn care or snow removal <br> 6. Improvements <br> 7. Recreational including swimming, golf, or tennis facilitieds <br> 8. Security including guards or alarm systems <br> 9. Utilities such as gas, electricity, water, heat <br> 10. Trash collection <br> 11. Other <br> 77. Don't Know | $\begin{gathered} <1-11,77, R>\text { [IF } 11 \text { is selected goto COSPOTH) } \\ \text { [ELSE goto SPECLX] } \end{gathered}$ |
| 03 | COSPOTH | COSPOTH | - Specify: | <30 characters> [goto SPECLX] |
| 031 | HOCOSP3 | HOCOSP3 | [1] ? [F1] <br> Since the first of ^REF_MONTH, what services were provided? <br> Enter all that apply, separate with commas <br> 1. Management <br> 2. Repairs or maintenance, including lawn care or snow removal <br> 3. Improvements <br> 4. Utilities such as gas, electricity, water, heat <br> 5. Parking <br> 6. Recreational including swimming, golf, or tennis facilities <br> 7. Security including guards or alarm systems <br> 8. Maid services <br> 9. Medical services <br> 10. Trash collection <br> 11. Other <br> 77. Don't Know | $<1-11,77, R>$ [IF 11 is selected, goto HOSPOTH] [ELSE goto SPECLX] |
| 03 | HOSPOTH | HOSPOTH | - Specify: | <30 characters> [goto SPECLX] |
| 03 | SPECLX | SPECLX | Since the first of ^REF_MONTH, how much were these special payments? | $\begin{gathered} \text { <1-99999999> [IF SPECLX gt } 6600 \text { goto ERR1_SPECLX] } \\ \text { [ELSE goto SPECLCX] } \\ \hline \end{gathered}$ |

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|  |  |  |  | <D,R> [goto ASSESSMT] |
| 03 | SPECLCX | SPECLCX | How much of that amount was paid this month? | <0-99999999> [IF SPECLCX gt 2200 goto ERR1_SPECLCX] <br> [ELSEIF SPECLCX gt SPECLX goto CK_SPECLCX] <br> [ELSE goto ASSESSMT] |
|  |  |  |  | <D,R> [goto ASSESSMT] |
| 03 | ASSESSMT | ASSESSMT | Since the first of ^REF_MONTH ^CU_havehas2 <br> ^YOU_YRCU paid any special assessments to a local government for construction or repair of roads, sidewalks, or other things like that? <br> 1. Yes <br> 2. No | ```<1> [goto ASSESSX] <2,D,R> [IF OWNYB = 100 goto RNTEQVX] [ELSEIFIF OWNYB = 300 goto VAC_OCCQ] [ELSE goto S3I_END]``` |
| 03 | ASSESSX | ASSESSX | What was the total amount paid? | ```<1-99999999> [IF ASSESSX It 6 or gt 77000 goto ERR1_ASSESSX] [ELSE goto ASSESSCX] <D,R> [IF OWNYB = 100 goto RNTEQVX] [ELSEIF OWNYB = 300 goto VAC_OCCQ] [ELSE goto S3I_END]``` |
| 03 | ASSESSCX | ASSESSCX | How much of that amount was paid this month? | ```<0-99999999> [IF ASSESSCX gt 2058 goto ERR1_ASSESSCX] [ELSEIF ASSESSCX gt ASSESSX goto CK_ASSESSCX] [ELSEIF OWNYB = 100 goto RNTEQVX] [ELSEIF OWNYB = 300 goto VAC_OCCQ] [ELSE goto S3I_END] <D,R> [IF OWNYB = 100 goto RNTEQVX] [ELSEIF OWNYB \(=300\) goto VAC_OCCQ] [ELSE goto S3I_END]``` |
| 03 | VAC_OCCQ | VAC_OCCQ | Since the first of ^REF_MONTH, how much time did you occupy this (timeshare/property)? <br> - Enter quantity and select period on next screen. | ```<0,D,R> [IF TIMESHAR (from 3B) \(=2\), D or R goto VAC_SEC] [ELSEIF TIMESHAR (from 3B) = 1 goto TIME_RNT] [ELSE goto S3I_END] <1-150> [goto VAC_OCCY]``` |
| 03 | VAC_OCCY | VAC_OCCY | Enter time period. 1. Days | ```\(<1-4, \mathrm{D}, \mathrm{R}>\) [IF TIMESHAR (from 3B) \(=2\), D or R goto VAC_SEC] [ELSEIF TIMESHAR (from 3B) = 1 goto TIME_RNT]``` |

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|  |  |  | 2. Weeks <br> 3. Months <br> 4. Percent <br> 5. Other, specify | ```[ELSE goto S3I_END] <5> [goto VAC_OTH]``` |
| 03 | VAC_OTH | VAC_OTH | - Specify: | $<30$ characters,D,R> [IF TIMESHAR (from 3B) $=2$, D or R goto VAC_SEC] <br> [ELSEIF TIMESHAR (from 3B) $=1$ goto <br> TIME_RNT] <br> [ELSE goto S3I_END] |
| 03 | VAC_SEC | VAC_SEC | Since the first of ^REF_MONTH, was this property either rented by someone outside your household or available to be rented? <br> 1. Yes <br> 2. No | $\begin{array}{lc} \hline<1> & \text { [goto VAC_RNTQ] } \\ <2, \mathrm{D}, \mathrm{R}> & \text { [goto RNTEQVX] } \end{array}$ |
| 03 | VAC_RNTQ | VAC_RNTQ | Since the first of ^REF_MONTH, how much time was this property rented by someone outside your household? <br> Enter quantity and select period on next screen. | $\begin{array}{ll} \hline<0, \mathrm{D}, \mathrm{R}> & \text { [goto VAC_AVAQ] } \\ <1-150> & \text { [goto VAC_RNTY] } \end{array}$ |
| 03 | VAC_RNTY | VAC_RNTY | Enter time period. <br> 1. Days <br> 2. Weeks <br> 3. Months <br> 4. Percent <br> 5. Other, specify | $\substack{<1-4, D, R>\\ <5>}$ [goto VAC_AVAQ] <br> [goto VAC_ROTH]  |
| 03 | VAC_ROTH | VAC_ROTH | - Specify: | <30 characters, D,R> [goto VAC_AVAQ] |
| 03 | VAC_AVAQ | VAC_AVAQ | Since the first of ^REF_MONTH, how much time was this property available to be rented? <br> Enter quantity and select period on next screen. | ```0,D,R> [IF OWNYB = 300 goto RNTEQV2X] [ELSE goto S3I_END] <1-150> [goto VAC_AVAY]``` |
| 03 | VAC_AVAY | VAC_AVAY | Specify <br> 1. Days <br> 2. Weeks <br> 3. Months <br> 4. Percent <br> 5. Other, specify | ```<1-4,D,R> [IF OWNYB = 300 goto RNTEQV2X] [ELSE goto S3I_END] <5> [goto VAC_AOTH]``` |
| 03 | VAC_AOTH | VAC_AOTH | - Specify | <30 characters,D,R> [IF OWNYB = 300 goto RNTEQV2X] |

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|  |  |  |  | [ELSE goto S3l_END] |
| 03 | RNTEQV2X | RNTEQV2X | If someone were to rent this home today, how much do you think it would rent for? | $\begin{aligned} & \text { <1-999999> [IF RNTEQV2X It } 200 \text { or gt } 800 \text { goto } \\ & \text { ERR1_RNTEQV2X] } \\ & \text { [ELSE goto RENTPERD] } \end{aligned}$ |
|  |  |  |  | <D,R> [goto RENTPERD] |
| 03 | RENTPERD | RENTPERD | - Ask if not already stated. | $\begin{array}{lc}<1-3, D, R> & \text { [goto RENTUTIL] } \\ <4> & \text { [goto RNPEROTH] }\end{array}$ |
|  |  |  | What period of time does this rental amount cover? |  |
|  |  |  | 1. Week <br> 2. Month <br> 3. Quarter <br> 4. Other specify |  |
| 03 | RNPEROTH | RNPEROTH | - Specify: | <30 characters> [goto RENTUTIL] |
| 03 | RENTUTIL | RENTUTIL | Does this amount include utilities? | <1,2,D,R> [goto PROPVALX] |
|  |  |  | 1. Yes <br> 2. No |  |
| 03 | RNTEQVX | RNTEQVX | If someone were to rent this (entire property/home) today, (including part of the property currently being used for business, farming, or rented, ) how much do you think it would rent for monthly, unfurnished and without utilities? | <1-999999> [IF (OWNYB = 100 and RNTEQVX It 300 or gt 3000) OR (OWNYB = 200 and RNTEQVX It 200 or gt 4000) OR (OWNYB = 300 and RNTEQVX It 200 or gt 8000) goto ERR1_RNTEQVX] <br> [ELSEIF OWNYB $=100$ OR (OWNYB $=300$ AND <br> TIMESHAR (from 3B) $=2$, D or R goto PROPVALX] <br> [ELSE goto S3I_END] <br> <D,R> [IF OWNYB = 100 OR (OWNYB = 300 AND TIMESHAR (from 3B) $=2$, D or R goto PROPVALX] [ELSE goto S3I_END] |
| 03 | PROPVALX | PROPVALX | About how much do you think this property would sell for on today's market? | <0-99999999> [IF OWNYB = 100 and PROPVALX It 1000 or gt 600000 OR (OWNYB = 300 and PROPVALX It 3000 or gt 800000) goto ERR1_PROPVALX] <br> [ELSE goto S3I_END] <br> <D,R> [goto S3I_END] |
| 03 | TIME_RNT | TIME_RNT | Since the first of ^REF_MONTH, did you rent this timeshare to someone outside your household? <br> 1. Yes | <1,2,D,R> [goto RNTEQV3X] |

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|  |  |  | 2. No |  |
| 03 | RNTEQV3X | RNTEQV3X | If you were to rent this timeshare today to someone else, instead of using it yourself, how much would it rent for weekly? | $\begin{aligned} & \text { <1-99999> [IF OWNYB }=300 \text { and RNTEQV3X It } 200 \text { or gt } \\ & 8000 \text { goto ERR1_RNTEQV3X] } \\ & \text { [ELSE goto PRPVAL2X] } \end{aligned}$ |
|  |  |  |  | <D,R> [goto PRPVAL2X] |
| 03 | PRPVAL2X | PRPVAL2X | If you were able to sell this timeshare, about how much do you think it would sell for on today's market? | $<0-99999999>$ [IF OWNYB = 300 and PRPVL2X It 3000 orgt 800000 goto ERR1_PRPVL2X][ELSE goto S3I_END]<D,R> [goto S3I_END] |
|  |  |  |  |  |
| 03 | ANYRENT | ANYRENT | Since the first of ^REF_MONTH have ${ }^{\wedge}$ YOU_ANYMEM rented any houses, apartments, or temporary living quarters NOT used entirely for business or vacation? <br> Do NOT include college or university regulated housing. <br> 1. Yes <br> 2. No |  |
|  |  |  |  |  |
| 02 | RENTX1 | RENTX1 | What was your total rental payment for ^REF_MONTH for this unit? Include any extra charges for garage or parking facilities, but do not include direct payments by local, state or federal agencies. | <0-9999999> [IF RENTX1 gt 3000 then goto ERR1_RENTX1] <br> [ELSE goto RENTX2] |
|  |  |  |  | <D,R> [goto RENTX2] |
| 02 | RENTX2 | RENTX2 | What was the total rental payment for ^TWO_MONTH for this unit? | <0-9999999> [IF RENTX2 gt 3000 then goto ERR1_RENTX2] <br> [ELSE goto RENTX3] |
|  |  |  |  | <D,R> [goto RENTX3] |
| 02 | RENTX3 | RENTX3 | What was your total rental payment for ^LAST_MONTH for this unit? <br> (Include any extra charges for garage or parking facilities, but do not include direct payments by local, state, or federal agencies.) | ```<0-9999999> [IF RENTX3 gt 3000 then goto ERR1_RENTX3] [ELSE goto RTELECT] <D,R> [goto RTELECT]``` |
| 02 | RTELECT | RTELECT | Does the rental payment include the cost of ... Electricity? | <1,2,D,R> [goto RTGAS] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |

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| 02 | RTGAS | RTGAS | - Repeat if necessary | <1,2,D,R> [goto RTWATER] |
|  |  |  | Does the rental payment include the cost of .... Gas? |  |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 02 | RTWATER | RTWATER | - Repeat if necessary | <1,2,D,R> [goto RTHEAT] |
|  |  |  | Does the rental payment include the cost of ... Piped in water? |  |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 02 | RTHEAT | RTHEAT | - Repeat if necessary | <1,2,D,R> [goto RTTRASH] |
|  |  |  | Does the rental payment include the cost of - $\qquad$ Heating? |  |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 02 | RTTRASH | RTTRASH | - Repeat if necessary | <1,2,D,R> [goto RTPARK] |
|  |  |  | Does the rental payment include the cost of - <br> ... Trash/garbage collection? |  |
|  |  |  | 1. Yes <br> 2. No |  |
| 02 | RTPARK | RTPARK | - Repeat if necessary | <1,2,D,R> [goto RTASPAY] |
|  |  |  | Does the rental payment include the cost of - <br> ... Garage and parking facilities? |  |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |

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| 02 | RTASPAY | RTASPAY | Did ^YOU_ANYMEM receive any reduced or free rent for this unit as a form of pay since the first of ^REF_MONTH? | <1> [goto RTCOMPX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto RTBSNS] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 02 | RTCOMPX | RTCOMPX | What is the current monthly rental charge to another tenant for a similar unit? | <0-999999> [IF RTCOMPX It 100 or gt 1550 then goto ERR1_RTCOMPX] [ELSE goto REGRNTX] |
|  |  |  |  | <D,R> [goto REGRNTX] |
| 02 | REGRNTX | REGRNTX | What is your regular rental payment? | <0-999999> [IF REGRNTX gt 1463 then goto ERR1_REGRNTX] <br> [ELSE goto RTBSNS] |
|  |  |  |  | <D,R> [goto RTBSNS] |
| 02 | RTBSNS | RTBSNS | Is any portion of this unit used for your own business? 1. Yes 2. No | <1> [goto RTBSNSZ] <br> <2,D,R> [IF STLRENT = 2 AND RTASPAY $=2$ then goto <br> CK_RTBSNS] <br> [ELSEIF PSU $=06037,06073,06075,06087$, <br> 06097, 11001, 24021, 24043, 34003, 34013, 34017, 34023, <br> 34027, 34031, 34037, 36005, 36047, 36059, 36061, 36081, 36085, 36087, 36103, 36119, then goto RENTCONT] [ELSE goto MORERNT] |
| 02 | RTBSNSZ | RTBSNSZ | What percent of the rental payment is counted as a business expense? <br> Enter to the nearest whole percent. | <1-99,D, R> [IF PSU = 06037, 06073, 06075, 06087, 06097, 11001, 24021, 24043, 34003, 34013, 34017, 34023, 34027, 34031, 34037, 36005, 36047, 36059, 36061, 36081, 36085, 36087, 36103, 36119 then goto RENTCONT] [ELSE goto MORERNT] |
|  |  |  |  | <100> [goto ERR2_RTBSNSZ] |
| 02 | RENTCONT | RENTCONT | Is this unit under rent control? | <1,2,D,R> [goto MORERNT] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 02 | MORERNT | MORERNT | Since the first of ^REF_MONTH, have ^YOU_ANYMEM rented any other houses, apartments, or temporary living quarters NOT used entirely for business or vacation? <br> - Do NOT include college or university regulated housing. | $<1>$ $[$ IF INTNMBR $=1$ then goto RENTX3] <br>  $[$ ELSE goto RENTX1] <br> $<2, \mathrm{D}, \mathrm{R}>$ $[$ goto S2_END] |

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|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 04A | S4A_INTRO | S4A_INTRO | CA 8 | <1> [goto TELEBILL] |
|  |  |  | Now I am going to ask about bills for telephone services. Please refer to any billing statements or other records you have when answering these questions. Please remember to include any bills you receive or pay online or have automatically deducted. Report any telephone bill you have received, even if the bill has not been paid. <br> Description Amount1 Amount2 Amount3 <br> (TELCOMP) (TELCHGX1) (TELCHGX2) (TELCHGX3) |  |
|  |  |  | 1. Enter 1 to Continue |  |
| 04A | TELEBILL | TELEBILL | [4 8 ? [F1] <br> Since the first of ^REF_MONTH, have ^YOU_ANYMEM received any bills for telephone services, including cellular and Voice Over IP? Do not include bills for telephones used entirely for business purposes. | <1> [IF any 8500.TELCOMP = 1-20, goto <br> TbIPhone.BSection4A.PREVCOMP] [ELSE, goto TbIPhone.BSection4A.TELCOMP] |
|  |  |  | 1. Yes <br> 2. No |  |
| 04A | PREVCOMP | PREVCOMP | What is the name of the company which provides the service? | $<1-20>$ [goto TELBSNS] <br> $<$ s5> [goto TELCOMP] <br> $<888>$ [goto TELOTH] |
|  |  |  | 1. ^8500.TELCOMP[1] <br> 2. ^8500.TELCOMP[2] <br> 3. ^8500.TELCOMP[3] <br> 4. ^8500.TELCOMP[4] <br> 5. ^8500.TELCOMP[5] <br> 6. ^8500.TELCOMP[6] <br> 7. ^8500.TELCOMP[7] <br> 8. ^8500.TELCOMP[8] <br> 9. ^8500.TELCOMP[9] <br> 10. ^8500.TELCOMP[10] <br> 11. ^8500.TELCOMP[11] <br> 12. ^8500.TELCOMP[12] <br> 13. ^8500.TELCOMP[13] <br> 14. ^8500.TELCOMP[14] <br> 15. ^8500.TELCOMP[15] |  |

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|  |  |  | 16. ^8500.TELCOMP[16] <br> 17. ^8500.TELCOMP[17] <br> 18. ^8500.TELCOMP[18] <br> 19. ^8500.TELCOMP[19] <br> 20. ^8500.TELCOMP[20] <br> 55. Company name not listed <br> 888. Delete the line |  |
| 04A | TELCOMP | TELCOMP | (What is the name of the company which provides the service?/"* Enter company name) | $<30$ characters> $<888>$ [goto TELOTH] TELBSNS] |
| 04A | TELBSNS | TELBSNS | Will any of the charges be deducted as a business expense? | ```<1> [goto TELBSNZ] <2,D,R> [IF INTNMBR = 1 goto TELCHGX3] [ELSE goto TELCHGX1]``` |
|  |  |  | 1. Yes <br> 2. No |  |
| 04A | TELBSNZ | TELBSNZ | What percentage will be deducted? $\begin{aligned} & \text { Description Amount1 Amount2 Amount3 } \\ & (T E L C O M P) \text { (TELCHGX1) (TELCHGX2) (TELCHGX3) } \end{aligned}$ | ```<1-99,D,R> [IF INTNMBR = 1 goto TELCHGX3] [ELSE goto TELCHGX1] <100> [goto CK_TELBSNZ]``` |
| 04A | TELCHGX1 | TELCHGX1 | How much were you billed for in ^REF_MONTH? Do not include any unpaid charges from a previous billing period. <br> Description Amount1 Amount2 Amount3 <br> (TELCOMP) (TELCHGX1) (TELCHGX2) (TELCHGX3) | ```<1-999999> [IF entry lt 7 or gt 400 goto ERR1_TELCHGX1] [ELSE goto TELCHGX2] <0,D,R> [goto TELCHGX2]``` |
| 04A | TELCHGX2 | TELCHGX2 | How much were you billed for in ^TWO_MONTH? Do not include any unpaid charges from a previous billing period. <br> Description Amount1 Amount2 Amount3 <br> (TELCOMP) (TELCHGX1) (TELCHGX2) (TELCHGX3) | ```<1-999999> [IF entry It 7 or gt 400, goto ERR1_TELCHGX2] [ELSE goto TELCHGX3] <0,D,R> [goto TELCHGX3]``` |
| 04A | TELCHGX3 | TELCHGX3 | How much were you billed for in ^LAST_MONTH? Do not include any unpaid charges from a previous billing period. <br> Description Amount1 Amount2 Amount3 <br> (TELCOMP) (TELCHGX1) (TELCHGX2) (TELCHGX3) | ```<1-999999> [IF entry It 7 or gt 400, goto ERR1_TELCHGX3] [ELSEIF TELCHGX1 = 0 OR TELCHGX2 = 0 OR TELCHGX3 \(=0\) goto BILPERD] [ELSE goto TYPETEL] <0,D,R> [IF TELCHGX1 = 0 OR TELCHGX2 = 0 OR TELCHGX3 \(=0\) goto BILPERD] [ELSE goto TYPETEL]``` |

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| 04A | TINTNTX1 | TINTNTX1 | How much of the ^REF_MONTH charges were for internet access? | ```<1-999999> [IF TINTNTX1 It 5 OR gt 60 goto ERR1_TINTNTX1] [ELSEIF TINTNTX1 gt TELCHGX1 goto CK_TINTNTX1] [ELSE goto TINTNTX2] <0,D,R> [goto TINTNTX2]``` |
| 04A | TINTNTX2 | TINTNTX2 | How much of the ^TWO_MONTH charges were for internet access? <br> Description Amount1 Amount2 Amount3 <br> (TELCOMP) (TELCHGX1) (TELCHGX2) (TELCHGX3) | ```\(<1\)-999999> [IF TINTNTX2 It 5 or gt 60 goto ERR1_TINTX2] [ELSEIF TINTNTX2 gt TELCHGX2 goto CK_TINTNTX2] [ELSE goto TINTNTX3] <0,D,R> [goto TINTNTX3]``` |
| 04A | TINTNTX3 | TINTNTX3 | How much of the ^LAST_MONTH charges were for internet access? <br> Description Amount1 Amount2 Amount3 <br> (TELCOMP) (TELCHGX1) (TELCHGX2) (TELCHGX3) | $<1$-999999> [IF TINTNTX3 It 5 or gt 60 goto <br> ERR1_TINTNTX3] <br> [ELSEIF TINTNTX3 gt TELCHGX3 goto <br> CK_TINTNTX3] <br> [ELSEIF TELTEMP = 2 AND INTNMBR $=1$, goto <br> TCABLEX3, Else goto TCABLEX1] <br> [ELSEIF TELTEMP $=3$ AND INTNMBR $=1$ goto <br> TAPPGMX3, Else goto TAPPGMX1] <br> [ELSEIF TELTEMP $=4$ AND INTNMBR $=1$, goto <br> NTRTPRX3, Else goto NTRTPRX1] <br> [Else goto TELOTH] <br> <0, D, R> [IF TELTEMP = 2 AND INTNMBR = 1, goto <br> TCABLEX3, Else goto TCABLEX1] <br> [ELSEIF TELTEMP $=3$ AND INTNMBR $=1$, <br> goto TAPPGMX3, Else goto TAPPGMX1] <br> [ELSEIF TELTEMP $=4$ AND $\operatorname{INTNMBR}=1$, <br> goto NTRTPRX3, Else goto NTRTPRX1] <br> [Else goto TELOTH] |
| 04A | TCABLEX1 | TCABLEX1 | How much of the ^REF_MONTH charges were for cable or satellite television service? | ```<1-999999> [IF TCABLEX1 It 5 or gt 90 goto ERR1_TCABLEX1] CK_TCABLEX1] [ELSEIF TCABLEX1 gt TELCHGX1 goto [ELSEIF (TCABLEX1 + TINTNTX1) gt TELCHGX1 goto CK2_TCABLEX1] [ELSE goto TCABLEX2] <0, D, R> [goto TCABLEX2]``` |
| 04A | TCABLEX2 | TCABLEX2 | How much of the ^TWO_MONTH charges were for cable or satellite television service? | $\begin{aligned} & \text { <1-999999> [IF TCABLEX2 It } 5 \text { or gt } 90 \text { goto } \\ & \text { ERR1_TCABLEX2] } \end{aligned}$ |


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|  |  |  | $\frac{\text { Description Amount1 Amount2 Amount3 }}{\text { (TELCOMP) (TELCHGX1) (TELCHGX2) (TELCHGX3) }}$ | [ELSEIF TCABLEX2 gt TELCHGX2 goto CK_TCABLEX2] <br> [ELSEIF TCABLEX2 + TINTNTX2 gt TELCHGX2 goto CK2_TCABLEX2] [ELSE gōto TCABLEX3] <br> <0, D, R> [goto TCABLEX3] |
| 04A | TCABLEX3 | TCABLEX3 | How much of the ^LAST_MONTH charges were for cable or satellite television service? | <1-999999> [IF TCABLEX3 It 5 or gt 90 goto <br> ERR1_TCABLEX3] <br> CK_TCABLEX3] <br> [ELSEIF TCABLEX3 gt TELCHGX3 goto <br> [ELSEIF TCABLEX3 + TINTNTX3 gt <br> TELCHGX3 goto CK2_TCABLEX3] <br> [ELSEIF INTNMBR = 1 AND TELTEMP $=3$, <br> goto TAPPGMX3, Else goto TAPPGMX1] <br> [ELSEIF INTNMBR = 1 AND TELTEMP = 4, <br> goto NTRTPRX3, Else goto NTRTPRX1] <br> [Else goto TELOTH] <br> <0, D, R> [IF INTNMBR = 1 AND TELTEMP = 3, goto <br> TAPPGMX3, Else goto TAPPGMX1] <br> [IF INTNMBR $=1$ AND TELTEMP $=4$, goto <br> NTRTPRX3, ELSE goto NTRTPRX1] <br> [ELSE goto TELOTH] |
| 04A | TAPPGMX1 | TAPPGMX1 | How much of the ^REF_MONTH charges were for applications, games, or ringtones? | ```<1-999999> [IF TAPPGMX1 gt 30 goto ERR1_ TAPPGMX1] CK_TAPPGMX1] [ELSEIF TAPPGMX1 gt TELCHGX1 goto [ELSEIF TAPPGMX1 + TINTNTX1 gt TELCHGX1 goto CK2_TAPPGMX1] TELCHGX1 goto CK3_TAPPGMX1] [ELSEIF TAPPGMX1 + TCABLEX1 gt [ELSEIF TAPPGMX1 + TCABLEX1 + TINTNTX1 gt TELCHGX1 goto CK4_ TAPPGMX1] [ELSE goto TAPPGMX 2 ] <0,D,R> [goto TAPPGMX2]``` |
| 04A | TAPPGMX2 | TAPPGMX2 | How much of the ^TWO_MONTH charges were for applications, games, or ringtones? <br> Description Amount1 Amount2 Amount3 <br> (TELCOMP) (TELCHGX1) (TELCHGX2) (TELCHGX3) | ```<1-999999> [IF TAPPGMX2 gt 30 goto ERR1_ TAPPGMX2] [ELSEIF TAPPGMX2 gt TELCHGX2 goto CK_ TAPPGMX2] [ELSEIF TAPPGMX2 + TINTNTX2 gt TELCHGX2 goto CK2_TAPPGMX2]``` |


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|  |  |  |  | [ELSEIF TAPPGMX2 + TCABLEX2 gt TELCHGX2 goto CK3_TAPPGMX2] <br> [ELSEIF TAPPGMX2 + TCABLEX2 + TINTNTX2 gt TELCHGX2 goto CK4_TAPPGMX2] <br> [ELSE goto TAPPGMX3] <br> <0,D,R> [goto TAPPGMX3] |
| 04 | TAPPGMX3 | TAPPGMX3 | How much of the ^LAST_MONTH charges were for applications, games, or ringtones? <br> Description Amount1 Amount2 Amount3 <br> (TELCOMP) (TELCHGX1) (TELCHGX2) (TELCHGX3) | ```<1-999999> [IF TAPPGMX3 gt 30 goto ERR1_TAPPGMX3] [ELSEIF TAPPGMX3 gt TELCHGX3 goto CK_TAPPGMX3] [ELSEIF TAPPGMX3 + TINTNTX3 gt TELCHGX3 goto CK2_TAPPGMX3] [ELSEIF TAPPGMX3 + TCABLEX3 gt TELCHGX3 goto CK3_TAPPGMX3] [ELLSEIF TAPPGMX3 + TCABLEX3 + TINTNTX3 gt TELCHGX3 goto CK4_TAPPGMX3] [ELSEIF TELTEMP \(=4\) AND INTNMBR \(=1\), goto NTRTPRX3, Else goto NTRTPRX1] [ELSE goto TELOTH] <0,D,R> [goto TELOTH]``` |
| 04A | NTRTPRX1 | NTRTPRX1 | How much of the ^REF_MONTH charges were for non-telephone related rentals or purchases? | <1-999999> [IF NTRTPRX1 gt 139 goto ERR1_ <br> NTRTPRX1] <br> [ELSEIF NTRTPRX1 gt TELCHGX1 goto <br> CK_NTRTPRX1] <br> [ELSEIF NTRTPRX1 + TINTNTX1 gt TELCHGX1 <br> goto CK2_NTRTPRX1] <br> [ELSEIF NTRTPRX1 + TCABLEX1 gt TELCHGX1 <br> goto CK3_NTRTPRX1] <br> [ELSEIF NTRTPRX1 + TAPPGMX1 gt TELCHGX1 <br> goto CK4_NTRTPRX1] <br> [ELSSEIF NTRTPRX1 + TCABLEX1 + TINTNTX1 gt <br> TELCHGX1 goto CK5_NTRTPRX1] <br> [ELSEIF NTRTPRX1 + TCABLEX1 + TAPPGMX1 <br> gt TELCHGX1 goto CK6_NTRTPRX1] <br> [ELSEIF NTRTPRX1 + TAPPGMX1 + TINTNTX1 <br> gt TELCHGX1 goto CK7_NTRTPRX1] <br> [ELSEIF NTRTP $\bar{R} \times 1$ + TINTNTX1 + TCABLEX1 + <br> TAPPGMX1 gt TELCHGX1 goto CK8_NTRTPRX1] <br> [ELSE goto NTRTPRX ${ }^{2}$ ] |


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|  |  |  |  | <0,D,R> [goto NTRTPRX2] |
| 04A | NTRTPRX2 | NTRTPRX2 | How much of the ^TWO_MONTH charges were for non-telephone related rentals or purchases? | ```<1-999999> [IF NTRTPRX2 gt 139 goto ERR1_ NTRTPRX2] [ELSEIF NTRTPRX2 gt TELCHGX2 goto CK_NTRTPRX2] [ELSEIF NTRTPRX2 + TINTNTX2 gt TELCHGX2 goto CK2_NTRTPRX2] [ELSEIF NTRTPRX2 + TCABLEX2 gt TELCHGX2 goto CK3_NTRTPRX2] [ELSEIF NTRTPRX2 + TAPPGMX2 gt TELCHGX2 goto CK4_NTRTPRX2] [ELSEIF NTRTPRX2 + TCABLEX2 + TINTNTX2 gt TELCHGX2 goto CK5_NTRTPRX2] [ELSEIF NTRTPRX2 + TCABLEX2 + TAPPGMX2 gt TELCHGX2 goto CK6_NTRTPRX2] [ELSEIF NTRTP \(\bar{R} \times 2+\) TAPPGMX2 + TINTNTX2 gt TELCHGX2 goto CK7_NTRTPRX2] [ELSEIF NTRTP \(\bar{R} \times 2\) + TINTNTX2 + TCABLEX2 + TAPPGMX2 gt TELCHGX2 goto CK8_NTRTPRX2] [ELSE goto NTRTPRX3] <0,D,R> [goto NTRTPRX3]``` |
| 04A | NTRTPRX3 | NTRTPRX3 | How much of the ^LAST_MONTH charges were for non-telephone related rentals or purchases? <br> Description Amount1 Amount2 Amount3 <br> (TELCOMP) (TELCHGX1) (TELCHGX2) (TELCHGX3) | ```<1-999999> [IF NTRTPRX3 gt 139 goto ERR1_ NTRTPRX3] [ELSEIF NTRTPRX3 gt TELCHGX3 goto CK_NTRTPRX3] [ELSEIF NTRTPRX3 + TINTNTX3 gt TELCHGX3 goto CK2_NTRTPRX3] [ELSEIF NTRTPRX3 + TCABLEX3 gt TELCHGX3 goto CK3_NTRTPRX3] [ELSEIF NTRTPRX3 + TAPPGMX3 gt TELCHGX3 goto CK4_NTRTPRX3] [ELSEIF NTRTPRX3 + TCABLEX3 + TINTNTX3 gt TELCHGX3 goto CK4CK5_NTRTPRX3] [ELSEIF NTRTPRX3 + TCABLEX3 + TAPPGMX3 gt TELCHGX3 goto CK6_NTRTPRX3] [ELSEIF NTRTPRX3 + TAPPGMX3 + TINTNTX3 gt TELCHGX3 goto CK7_NTRTPRX3] [ELSEIF NTRTPRX3 + TINTNTX3 + TCABLEX3 + TAPPGMX3 gt TELCHGX3 goto CK8_NTRTPRX3] [ELSE goto TELOTH] <0,D,R> [goto TELOTH]``` |

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
| 04A | TELOTH | TELOTH | Did ^YOU_ANYMEM receive any other bills for telephones not used entirely for business purposes? | <1> [IF row number = 20 goto ERR_MAX] <br> [ELSEIF any 8500.TELCOMP = 1-20 goto PREVCOMP, next line of grid] <br> [ELSE goto TELCOMP, next line of grid] |
|  |  |  | $\frac{\text { Description Amount1 Amount2 Amount3 }}{(\text { TELCOMP) (TELCHGX1) (TELCHGX2) (TELCHGX3) }}$ | <2> [goto S4A_END] |
|  |  |  | 1. Yes <br> 2. No |  |
| 04B | FONCARD | FONCARD | Since the first of ^REF_MONTH, have ^YOU_ANYMEM purchased any pre-paid long distance telephone cards/minutes, not already reported? | $\begin{array}{lr} \hline<1> & \text { [goto FONCARDX] } \\ <2, \mathrm{D}, \mathrm{R}>\text { [goto PRPYCELL] } \end{array}$ |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 04B | FONCARDX | FONCARDX | What was the total amount paid? | <1-9999> [IF FONCRDX It 5 or gt 300 goto ERR1_FONCARDX] <br> [ELSE goto FONCRDCX] |
|  |  |  |  | <D,R> [goto FONCRDCX] |
| 04B | FONCRDCX | FONCRDCX | How much of the total was paid this month? | <0-9999> [IF FONCRDCX It 5 or gt 100 goto ERR1_FONCRDCX] <br> [ELSEIF FONCRDCX gt FONCARDX goto CK_FONCRDCX] <br> [ELSE goto PRPYCELL] |
|  |  |  |  | <D,R> [goto PRPYCELL] |
| 04B | PRPYCELL | PRPYCELL | Since the first of ^REF_MONTH, have you had any expenses for Prepaid Cellular minutes, not already reported? | $<1>$ [goto PRPYCLX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto PYPHONE] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 04B | PRPYCLX | PRPYCLX | What was the total amount paid? | <1-9999> [IF PRPYCLX It 5 or gt 280 goto ERR1_PRPYCLX] <br> [ELSE goto PRPYCCX] |
|  |  |  |  | <D,R> [goto PRPYCCX] |
| 04B | PRPYCCX | PRPYCCX | How much of the total was paid this month? | $<0-9999>$ [IF PRPYCCX $=1-5$ or gt 50 goto ERR1_PRPYCCX] |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  |  | ```[ELSEIF PRPYCCX gt PRPYCLX gotoNone``` |
| 04A | PYPHONE | PYPHONE | Since the first of ^REF_MONTH], have ^YOU_ANYMEM had any expenses for public pay phone services not already reported? <br> Do not include expenses for phone cards associated with the regular phone bill or pre-paid phone cards. <br> 1. Yes <br> 2. No | $<1>$ [goto PYPHONEX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto S4B_END] |
| 04B | PYPHONEX | PYPHONEX | What was the total amount spent? <br> For amounts less than $\$ 0.50$, enter $\$ 0$ <br> For amounts $\$ 0.50$ to $\$ 0.99$, enter $\$ 1$ |  |
| 04B | PYPHONCX | PYPHONCX | How much of the total amount was spent this month? | ```<0-9999> [IF PYPHONCX gt 10 goto ERR1_PYPHONCX] [ELSEIF PYPHONCX gt PYPHONEX goto CK_PHONCX] [ELSE goto S4B_END] <D,R> [goto S4B_END]``` |
| 04C | S4C_INTRO | S4C_INTRO | [4] 8 <br> Now I am going to ask about cable and satellite TV service, satellite radio service, and internet service expenditures. <br> 1. Enter 1 to Continue | <1> [goto Tblinterservexpend.BSection04C.UTI_ITEM] |
| 04C | UTI_ITEM | UTI_ITEM | [EA 8 ? [F1] <br> Since the first of ^REF_MONTH have ^YOU_ANYMEM had any expenses for ... <br> * Read each item on list. <br> 1. Cable or satellite TV services, not already reported? <br> 2. Satellite radio services, not already reported? <br> 3. Internet connection or an internet service provider, not already reported? <br> 4. Internet services away from home such as web cafes or internet kiosks? | $<1-4>$ [goto INTDESC] <br> $<99>$ [goto S4C_END] <br> $<888>$ [goto UTI_ITEM - next line of grid] [If no more grid <br>  lines goto S4C_END] |

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| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 99. None/ no more entries 888. Delete the line |  |
| 04C | INTDESC | INTDESC | What was the expense for? | <30 characters> [goto INTMO] |
| 04C | INTMO | INTMO | In what month was the expense? <br> Enter 13 for same amount each month of the reference period | <REF_MONTH - CUR_MONTH> [IF INTMO is not in then reference period goto ERR3_INTMO] [ELSE goto INTCHGX] |
|  |  |  | Expense Amount Month <br> (INTSERV) (INTCHGX) (INTMO) | <13,D,R> [goto INTCHGX] |



## What was (Description) combined with?

- Enter all that apply, separate with commas.

| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | $\begin{array}{ll} \text { Expense } & \text { Amount Month } \\ (\text { INTSERV) } & \text { (INTCHGX) (INTMO) } \end{array}$ |  |
|  |  |  | 1. Cable or satellite TV services <br> 2. Satellite radio services <br> 3. Internet connection or an internet service provider <br> 4. Listening to or downloading music or audio files <br> 5. Viewing or downloading video files <br> 6. Online games or other internet entertainment sites <br> 4. Internet services away from home such as web cafes or internet kiosks <br> 77. Misc. combined (unable to specify/DK) |  |
| 04C | INTMORE | INTMORE | Did you have any other expenses for (Description)? | <1> [IF row number = 40 goto ERR_MAX] <br> [ELSE goto UTI_ITEM, next line of grid] <br> <2,D,R> [goto UTI_ITEM, next line of grid] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 04A | S4D_INTRO | S4D_INTRO | W4 8 | <1> [goto UTC_ITEM] |
|  |  |  | Now I am going to ask about utility bills. Please refer to any billing statements or other records you have when answering these questions. Please remember to include any bills you receive or pay online or have automatically deducted. Report any utility bill you have received, even if the bill has not been paid. |  |
|  |  |  | 1. Enter 1 to Continue |  |
| 04 | UTC_ITEM | UTC_ITEM | [EH 8 ? [F1] <br> Since the first of ^REF_MONTH, have ^YOU_ANYMEM received any bills for any of the following utilities, fuels, or services? Do not include bills for properties used entirely for business. <br> Read each item on list: | $<1-10>$ [goto WHATPROP] <br> $<99>$ [goto S4D_END] <br> $<888>$ [go to next line on grid] |
|  |  |  | 1. Electricity <br> 2. Natural or utility gas |  |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 3. Fuel oil <br> 4. Bottled or tank gas <br> 5. Other fuels including wood <br> 6. Piped-in water <br> 7. Sewerage maintenance <br> 8. Trash/garbage collection <br> 9. Water softening service <br> 10. Septic tank cleaning <br> 99. None/No more entries <br> 888. Delete the line |  |
| 04 | WHATPROP | WHATPROP | Which property was the bill for? <br> 1. ^Prop_display[1] <br> 2. ^Prop_display[2] <br> 3. ^Prop_display[3] <br> 4. ${ }^{\wedge}$ Prop_display[4] <br> 5. ^Prop_display[5] <br> 6. ${ }^{\wedge}$ Prop_display[6] <br> 7. ^Prop_display[7] <br> 8. ^Prop_display[8] <br> 9. $\wedge$ Prop_display[9] <br> 10. ^Prop_display[10] <br> 11. ^Prop_display[11] <br> 12. ^Prop_display[12] <br> 13. ^Prop_display[13] <br> 14. ^Prop_display[14] <br> 15. ^Prop_display[15] <br> 16. ^Prop_display[16] <br> 17. ^Prop_display[17] <br> 18. ^Prop_display[18] <br> 19. ^Prop_display[19] <br> 20. ^Prop_display[20] <br> 40. ^Prop_display[40] <br> 41. ^Prop_display[41] <br> 42. Rented vacation Property <br> 43. Property not owned or rented by household | $<1-20,40>$ [IF entry greater than the number of owned properties or deleted properties are selected. (PROPDESC = 888 OR OPB_STAT = 3 from <br> section 3) goto CK_WHATPROP] <br> [IF UTC_ITEM = 1-3, 6-8 and no data in <br> any 8500.COMPNAME [1]-[40] goto COMPNAME] [IF UTC_ITEM = 1-3, 6-8 and any data <br> in 8500.COMPNAME [1]-[40] goto LASTCOMP] [ELSE goto UTILBUSN] <br> <41,42,43,D,R> <br> [goto UTLPDESC] |
| 04 | UTLPDESC | UTLPDESC | Briefly describe the property. | $<30$ characters $>$ [IF UTC_ITEM $=1-3,6-8$ AND no data in any 8500.COMPNAME [1]-[40] goto COMPNAME] <br> [If UTC_ITEM $=1-3,6-8$ and any data in <br> 8500.COMPNAME [1]-[40] goto LASTCOMP] <br> [ELSE goto UTILBUSN] |
| 04 | LASTCOMP | LASTCOMP | What is the name of the company or governm | <1-20> [goto UTILBUSN] |

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  |  | <55> [goto COMPNAME] |
|  |  |  | 1. ^Comp_display[1] <br> 2. ^Comp_display[2] <br> 3. ^Comp_display[3] <br> 4. ^Comp_display[4] <br> 5. ^Comp_display[5] <br> 6. ^Comp_display[6] <br> 7. ^Comp_display[7] <br> 8. ^Comp_display[8] <br> 9. ^Comp_display[9] <br> 10. ^Comp_display[10] <br> 11. ^Comp_display[11] <br> 12. ^Comp_display[12] <br> 13. ^Comp_display[13] <br> 14. ^Comp_display[14] <br> 15. ^Comp_display[15] <br> 16. ^Comp_display[16] <br> 17. ^Comp_display[17] <br> 18. ^Comp_display[18] <br> 19. ^Comp_display[19] <br> 20. ^Comp_display[20] <br> 55. Company name not listed |  |
| 04 | COMPNAME | COMPNAME | What is the name of the company or government agency which provides (electricity/natural or utility gas/fuel oil/piped-in water/sewerage maintenance/trash or garbage collection)? <br> Prop \# Property Description Company Name Utility Amount Month (WHATPROP) (UTLPDESC) (COMPNAME) (UTILY) (UTLCHGX)(BILLMO) | <30 characters> [goto UTILBUSN] |
| 04 | UTILBUSN | UTILBUSN | Will any part of the ^Utilbusn_desc charges be deducted as a business expense? $\frac{\text { Prop \# Property Description Company Name Utility Amount Month }}{\text { (WHATPROP) (UTLPDESC) }} \quad \text { (COMPNAME) } \quad \text { (UTILY) (UTLCHGX)(BILLMO) }$ | <1,2,D,R> [IF INTNMBR = 1 goto UTLCHGX3, else goto UTLCHGX1] |
|  |  |  | 1. Yes <br> 2. No |  |
| 04 | UTLCHGX1 | UTLCHGX1 | How much were you billed for in ^REF_MONTH? | $\begin{aligned} & \text { <0-999999> [IF (UTILY = } 100 \text { and UTLCHGX1 It } 15 \text { or } \\ & \text { UTLCHGX1 gt } 500 \text { )OR (UTILY =110 and UTLCHGX1 It } 8 \\ & \hline \end{aligned}$ |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | Prop \# Property Description Company Name Utility Amount Month <br> (WHATPROP) (UTLPDESC) (COMPNAME) (UTILY) (UTLCHGX)(BILLMO) | or UTLCHGX1 gt 500)OR (UTILY = 130 and UTLCHGX1 It 34 or UTLCHGX1 gt 722) OR (UTILY $=150$ and UTLCHGX1 It 7 or UTLCHGX1 gt 600) OR (UTILY $=180$ and UTLCHGX1 It 19 or UTLCHGX1 gt 700) OR (UTILY = 200 and UTLCHGX1 It 8 or UTLCHGX1 gt 250) OR (UTILY $=210$ and UTLCHGX1 It 6 or UTLCHGX1 gt 150) OR (UTILY $=220$ and UTLCHGX1 It 6 or UTLCHGX1 gt 250) OR (UTILY = 270 and UTLCHGX1 It 7 or UTLCHGX1 gt 106) OR (UTILY = 280 and UTLCHGX1 It 5 or UTLCHGX1 gt 600) goto ERR1_UTLCHGX1] [ELSE goto UT̄ILCHGX2] |
|  |  |  |  | <D,R> [goto UTILCHGX2] |
| 04 | UTLCHGX2 | UTLCHGX2 | How much were you billed for in ^TWO_MONTH? | <0-999999> [IF (UTILY = 100 and UTLCHGX2 It 15 or UTLCHGX2 gt 500) or (UTILY = 110 and UTLCHGX2 It 8 or UTLCHGX2 gt 500) or (UTILY = 130 and UTLCHGX2 It 34 or UTLCHGX2 gt 722) or (UTILY $=150$ and UTLCHGX2 It 7 or UTLCHGX2 gt 600) or (UTILY $=180$ and UTLCHGX2 It 19 or UTLCHGX2 gt 700) or (UTILY = 200 and UTLCHGX2 It 8 or UTLCHGX2 gt 250) or (UTILY $=210$ and UTLCHGX2 It 6 or UTLCHGX2 gt 150) or (UTILY = 220 and UTLCHGX2 It 6 or UTLCHGX2 gt 250) or (UTILY $=270$ and UTLCHGX2 It 7 or UTLCHGX2 gt 106) or (UTILY = 280 and UTLCHGX2 It 5 or UTLCHGX2 gt 600) goto ERR1_ UTLCHGX2] <br> [ELSE goto UTILCHGX3] |
|  |  |  |  | <D,R> [goto UTILCHGX3] |
| 04 | UTLCHGX3 | UTLCHGX3 | How much were you billed for in ^LAST_MONTH? | <0-999999> [IF (UTILY = 100 and UTLCHGX3 It 15 or UTLCHGX3 gt 500) or (UTILY $=110$ and UTLCHGX3 It 8 or UTLCHGX3 gt 500) or (UTILY = 130 and UTLCHGX3 It 34 or UTLCHGX3 gt 722) or (UTILY $=150$ and UTLCHGX3 It 7 or UTLCHGX3 gt 600) or (UTILY = 180 and UTLCHGX3lt 19 or UTLCHGX3 gt 700) or (UTILY $=200$ and UTLCHGX3 It 8 or UTLCHGX3 gt 250) or (UTILY $=210$ and UTLCHGX3 It 6 or UTLCHGX3gt 150) or (UTILY = 220 and UTLCHGX3 It 6 or UTLCHGX3 gt 250) or (UTILY $=270$ and UTLCHGX3 It 7 or UTLCHGX3 gt 106) or (UTILY $=280$ and UTLCHGX3 It 5 or UTLCHGX3 gt 600) goto ERR1_UTLCHGX3] <br> [ELSEIF UTLCHGX1 ne 0 AND UTLCHGX2 ne 0 AND UTLCHGX3 ne 0 goto UTILCMB_S] [ELSE goto BLPERIOD] |

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
| 04 | BLPERIOD | BLPERIOD | What is your usual billing period for the service? | $\begin{aligned} & \hline<1-4, \mathrm{D}, \mathrm{R}> \\ & <5> \\ & \text { [goto UTILCMB_S] } \\ & \text { [goto BLPEROTH] } \end{aligned}$ |
|  |  |  | $\begin{array}{ll} \text { Prop \# Property Description Company Name Utility } \text { Amount Month } \\ \text { (WHATPROP) (UTLPDESC) } & \text { (COMPNAME) } \end{array}$ |  |
|  |  |  | 1. Month <br> 2. 2 months <br> 3. Quarter <br> 4. Annual <br> 5. Other |  |
| 04 | BLPEROTH | BLPEROTH | - Specify: | <30 characters> [goto UTILCMB_S] |
|  |  |  | Prop \# Property Description Company Name Utility Amount Month (WHATPROP) (UTLPDESC) (COMPNAME) (UTILY) (UTLCHGX)(BILLMO) |  |
| 04 | UTILCMB_S | UTILCMB_S | - Enter 'C' for a combined expense | <C> [goto UTILCMB] <empty [goto MOREBILL] [If anything other than a 'C' or empty is entered, go to CK_C] |
| 04 | UTILCMB | UTILCMB | [A] 8 ? [F1] | <1-10,77> [goto MOREBILL] |
|  |  |  | What other utilities, fuels, or services was ^Utilbusn_desc combined with? <br> Enter all that apply, separate with commas. <br> Prop \# Property Description Company Name Utility Amount Month <br> (WHATPROP) (UTLPDESC) (COMPNAME) (UTILY) (UTLCHGX)(BILLMO) <br> 1. Electricity <br> 2. Natural or utility gas <br> 3. Fuel oil <br> 4. Bottled or tank gas <br> 5. Other fuels including wood <br> 6. Piped-in water <br> 7. Sewerage maintenance <br> 8. Trash/garbage collection <br> 9. Water softening service <br> 10. Septic tank cleaning <br> 77. Misc. combined (unable to specify/DK) |  |
|  | MOREBILL | MOREBILL | Did you receive any other ^Utilbusn_desc bills? | <1> [IF ROW number $=40$, goto ERR_MAX] [ELSE goto UTC_ITEM, next line of grid] |

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| :---: | :---: | :---: | :---: | :---: |
|  |  |  | Prop \# Property Description Company Name Utility Amount Month |  |
|  |  |  | (WHATPROP) (UTLPDESC) (COMPNAME) (UTILY) (UTLCHGX)(BILLMO) | <2,D,R> [goto UTC_ITEM, next line of grid] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 05 | S5_INTRO | S5_INTRO | [49 | <1> [goto ITEM] |
|  |  |  | Now I am going to ask about expenses for construction, repairs, alterations and maintenance of property. |  |
|  |  |  |  |  |
|  |  |  | 1. Enter 1 to Continue |  |
| 05 | CRB_ITEM | ITEM | He 9 ? [F1] | <1-22> [goto CRMPROPI] <br> $<95>$ [goto next row] <br> $<99>$ [goto ADVMATER] <br> $<888>$ [goto ITEM - next line of grid] <br>  [if no more grid lines goto ADVMATER] |
|  |  |  | SCREEN 1 ------------------------------------- |  |
|  |  |  | First, let's talk about the construction or alteration of property you own or rent. (You should not include jobs that have been or will be totally reimbursed by someone outside your household such as a landlord.) |  |
|  |  |  | Since the first of ^REF_MONTH, have ^YOU_ANYMEM had expenses for - <br> - Read each item on list. |  |
|  |  |  |  |  |
|  |  |  | Now, let's talk about maintenance and repairs for property you own or rent. (Again, you should not include jobs that have been or will be totally reimbursed by someone outside your household such as a landlord.) |  |
|  |  |  | - Read each item on list. |  |
|  |  |  | SCREEN 3---------------------------------------- |  |
|  |  |  | Have there been any expenses for any other property, such as property that you do not own or rent, paid for by ^YOU_ANYMEM? |  |
|  |  |  | - If Yes - |  |
|  |  |  | Which type of job were those expenses for? |  |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 2. Building an addition to the house or a new structure, such as a porch, garage, or new wing? <br> 3. Finishing a basement or an attic or enclosing a porch? <br> 4. Remodeling one or more rooms in the house? <br> 5. Landscaping the ground or planting new shrubs or trees? <br> 6. Building outdoor patios, walks, fences, or other enclosures, driveways, or permanent swimming pools or hot tubs? <br> 7. Repairing outdoor patios, walks, fences, driveways, or permanent swimming pools? <br> 8. Inside painting or papering? <br> 9. Outside painting? <br> 10. Plastering or paneling? <br> 11. Plumbing or water heating installations or repairs? <br> 12. Electrical work? <br> 13. Heating or air conditioning jobs? <br> 14. Flooring repair or replacement, including wood, vinyl, and tile? <br> 15. Wall-to-wall carpet - original installation? <br> 16. Wall-to-wall carpet - replacement? <br> 17. Insulation? <br> 18. Roofing, gutters, or downspouts? <br> 19. Siding? <br> 20. Installation, repair, or replacement of window pains, screens, storm doors, awnings, and the like? <br> 21. Masonry, brick or stucco work? <br> 22. Other improvements or repairs? <br> 95. Continue list <br> 99. None/no more entries <br> 888. Delete the line |  |
| 05 | CRMPROPI | CRMPROPI | On which property was the work done? <br> Prop Description Work Desc Total | <1-20> [If entry gt total number of properties, goto CK_CRMPROPI] <br> [ELSE goto WRKDESC] |
|  |  |  | (WRKDESC) (PRP5DESC) (TOTJBCST) | <97> [goto WRKDESC] |
|  |  |  | 1. ^Property[1] <br> 2. ^Property[2] <br> 3. ^Property[3] <br> 4. ^Property[4] <br> 5. ^Property[5] <br> 6. ^Property[6] <br> 7. ^Property[7] <br> 8. ^Property[8] <br> 9. ^Property[9] <br> 10. ^Property[10] <br> 11. ^Property[11] <br> 12. ^Property[12] <br> 13. ^Property[13] <br> 14. ^Property[14] <br> 15. ^Property[15] | <98,99,D,R> [goto PRP5DESC] |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 16. ^Property[16] <br> 17. ^Property[17] <br> 18. ^Property[18] <br> 19. ^Property[19] <br> 20. ^Property[20] <br> 97. ^S5_Rented_SU <br> 98. ^S5_Other <br> 99. Property not owned or rented by household |  |
| 05 | PRP5DESC | PRP5DESC | Briefly describe the property. <br> Prop Description Work Desc Total <br> (WRKDESC) (PRP5DESC) (TOTJBCST) | <30 characters> [goto WRKDESC] |
| 05 | WRKDESC | WRKDESC | What work was done? <br> The description should be adequate to classify "alteration", "repair", etc., and to identify in next interview. |  |
| 05 | CRMTYPE | CRMTYPE | Enter the appropriate job classification code. <br> 2. Alteration <br> 3. Replacement <br> 4. Maintenance and repair | ```<2> [if ITEM = 10, 13, 17, or 19 goto TOTJBCST] [else goto TEMPCODE] <3> [if ITEM = 10, 12-15, 19 or 21-22 goto TOTJBCST] [else goto TEMPCODE] <4> [if ITEM = 11-15, 19 or 21-22 goto TOTJBCST] [else goto TEMPCODE] <D,R> [goto TEMPCODE]``` |
| 05 | TEMPCODE | TEMPCODE | Enter the appropriate detailed job code. <br> 1. ^S5a_Tempcode[1] <br> 2. ^S5a_Tempcode[2] <br> 3. ^S5a_Tempcode[3] <br> 4. ^S5a_Tempcode[4] <br> 5. ^S5a_Tempcode[5] <br> 6. ^S5a_Tempcode[6] <br> 7. ^S5a_Tempcode[7] | <1-10,D,R> [goto TOTJBCST] |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 8. ^S5a_Tempcode[8] 9. ^S5a_Tempcode[9] 10. ^S5a_Tempcode[10] |  |
| 05 | TOTJBCST | TOTJBCST | What was the total cost of the job? <br> Include all costs paid for by ^YOU_ANYMEM or by someone outside your household, such as insurance companies, and so forth, regardless of when you made the payment(s) or incurred the costs. | <1-999999> [if (CRMCODEB $=100$ and TOTJBCST It 10 or gt 100000) OR (CRMCODEB $=110$ and TOTJBCST It 15 or gt 50000) OR (CRMCODEB $=120$ and TOTJBCST It 15 or gt 23000) OR (CRMCODEB $=130$ and TOTJBCST It 40 or gt 30000) OR (CRMCODEB $=140$ and TOTJBCST it 18 or gt 5800) OR (CRMCODEB $=150$ and TOTJBCST It 49 or gt 22450) OR (CRMCODEB $=160$ and TOTJBCST It 14 or gt 7250) OR (CRMCODEB $=170$ and TOTJBCST It 10 or gt 2400) OR (CRMCODEB $=180$ and TOTJBCST It 10 or gt 5460) OR (CRMCODEB $=190$ and TOTJBCST it 6 or gt 2500) OR (CRMCODEB $=200$ and TOTJBCST It 10 or gt 2906) OR (CRMCODEB $=210$ and TOTJBCST It 7 or gt 5080) OR (CRMCODEB $=220$ and TOTJBCST It 18 or gt 6000) OR (CRMCODEB $=230$ and TOTJBCST It 25 or gt 9000) OR (CRMCODEB $=240$ and TOTJBCST It 5 or gt 4100) OR (CRMCODEB $=260$ and TOTJBCST It 10 or gt 11000) OR (CRMCODEB $=270$ and TOTJBCST It 20 or gt 16000) OR (CRMCODEB $=280$ and TOTJBCST It 10 or gt 10000) OR (CRMCODEB $=290$ and TOTJBCST It 10 or gt 38000) OR (CRMCODEB $=300$ and TOTJBCST It 10 or gt 6500) OR (CRMCODEB $=231$ and TOTJBCST It 10 or gt 12000) OR (CRMCODEB $=232$ and TOTJBCST It 30 or gt 5000) then goto ERR1_TOTJBCST] [ELSE goto S5BCMB_S] <br> <D,R> [goto S5BCMB_S] |
| 05 | S5BCMB_S | S5BCMB_S | - Enter 'C' for a combined expense | <C> $\quad$ [goto S5B_COMB] <empty> $\quad$ [goto CONTRACT] [IF any entry other than a 'C' or the enter key is entered, goto CK_C] |
|  | S5B_COMB | S5B_COMB | [d] 9 ? [F1] | <1-22,77> [goto CONTRACT] |
|  |  |  | What other work was included in this job? <br> Enter all that apply, separate with commas. <br> 1. Dwellings under construction including a vacation home or second home <br> 2. Building an addition to the house or a new structure such as a porch, garage, or new wing <br> 3. Finishing a basement or an attic or enclosing a porch <br> 4. Remodeling one or more rooms in the house <br> 5. Landscaping the ground or planting new shrubs or trees |  |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 6. Build outdoor patios, walks, fences, or other enclosures, driveways, or permanent swimming pools or hot tubs <br> 7. Repair outdoor patios, walks, fences <br> 8. Inside painting or papering <br> 9. Outside painting <br> 10. Plastering or paneling <br> 11. Plumbing or water heating installations or repairs <br> 12. Electrical work <br> 13. Heat or air conditioning jobs <br> 14. Flooring repair or replacement, including wood, vinyl, and tile <br> 15. Wall-to-wall carpet - original installation <br> 16. Wall-to-wall carpet - replacement <br> 17. Insulation <br> 18. Roofing, gutters, or downspouts <br> 19. Siding <br> 20. Installation, repair, replacement of window panes, screens, storm doors, awnings, and the like <br> 21. Masonry, brick or stucco <br> 22. Other improvements or repairs <br> 77. Misc. combined (unable to specify/DK) |  |
| 05 | CONTRACT | CONTRACT | Did you do all the work for this job yourself or did you pay someone else to do all or part of the work? <br> 1. Self Only <br> 2. Paid or contracted with someone else <br> 3. Both | ```<1,D,R> [goto CRMMATER] <2,3> [If INTNMBR = 1 goto CNTRCTX1] [ELSE goto CNTRCTX3]``` |
| 05 | CNTRCTX3 | CNTRCTX3 | What did you pay in ^REF_MONTH to someone else for this job? | $\begin{aligned} & \text { <0-999999> [IF (CRMCODEB }=100 \text { and CNTRCTX3 gt } \\ & \text { 38715) OR (CRMCODEB }=110-150 \text { and CNTRCTX3 gt } \\ & \text { 10000) OR (CRMCODEB }=160-310 \text { and CNTRCTX3 gt } \\ & \text { 3850) then goto ERR1_CNTRCTX3] } \\ & \text { [ELSE goto CNTRCTX2] } \\ & \text { <D,R> [goto CNTRCTX2] } \end{aligned}$ |
| 05 | CNTRCTX2 | CNTRCTX2 | What did you pay in ^TWO_MONTH to someone else for this job? | $<0-999999>$ [IF (CRMCODEB $=100$ and CNTRCTX2 gt 345339) OR (CRMCODEB $=110-150$ and CNTRCTX2 gt 10000) OR (CRMCODEB $=160-310$ and CNTRCTX2 gt 4000) then goto ERR1_CNTRCTX2] [ELSE goto CNTRCTX1] <D,R> [goto CNTRCTX1] |
| 05 | CNTRCTX1 | CNTRCTX1 | What did you pay in ^LAST_MONTH to someone else for this job? <br> Prop Description Work Desc Total <br> (WRKDESC) (PRP5DESC) (TOTJBCST) | <0-999999> [IF (CRMCODEB = 100 and CNTRCTX1 gt 43852) OR CRMCODEB $=110-150$ and CNTRCTX1 gt 14630) OR (CRMCODEB $=160-310$ and CNTRCTX1 gt 4000) then goto ERR1_CNTRCTX1] |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  |  | [ELSE goto CNTRCTX0] |
|  |  |  |  | <D,R> [goto CNTRCTX0] |
| 05 | CNTRCTX0 | CNTRCTX0 | How much was paid this month? | <0-999999,D,R> [if (CRMCODEB = 100 and CNTRCTX0 gt 14000) OR (CRMCODEB $=110-150$ and CNTRCTX0 gt 6000) OR (CRMCODEB $=160-310$ and CNTRCTX0 gt 2003) then goto ERR1_CNTRCTX0] <br> [ELSEIF INTNMBR $=2-5$ AND (CNTRCTX3 $=0$ and CNTRCTX2 $=0$ and CNTRCTX1 $=0$ and CNTRCTXO $=0$ ) then goto CK_CNTRCTX] <br> [ELSEIF INTNMBR $=2-5$ AND (CNTRCTX3 <br> $=\mathrm{D}$ or CNTRCTX2 $=\mathrm{D}$ or CNTRCTX1 $=\mathrm{D}$ or CNTRCTX0 $=$ D then goto CONTRCTX] <br> [ELSEIF ITEM = 1-4, 11-13 or 22 goto <br> MAJ_APPL] <br> [ELSE goto CRMMATER] |
|  |  |  | (WRKDESC) (PRP5DESC) (TOTJBCST) |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
| 05 | CONTRCTX | CONTRCTX | Since the first of ^REF_MONTH, what is the total amount you paid to someone else for this job? | $<0-999999>$ [if (CRMCODEB $=100$ and CONTRCTX gt 109445) OR |
|  |  |  |  | (CRMCODEB $=110-150$ and CONTRCTX |
|  |  |  |  | gt 28000) OR $\text { (CRMCODEB }=160-310 \text { and CONTRCTX }$ |
|  |  |  |  | gt 8000) then goto [RR1 CONTRCTX] |
|  |  |  |  | then goto ERR1_CONTRCTX] <br> [ELSEIF ITEM = 1-4, 11-13 or 22 goto |
|  |  |  |  | MAJ_APPL] <br> [Else goto |
|  |  |  |  | BSECT5.BBLOCKA.BROW.BROWA2.CRMMATER] |
|  |  |  |  | ```<D,R> [IF ITEM = 1-4, 11-13 or 22 goto MAJ_APPL] [Else goto BSECT5.BBLOCKA.BROW.BROWA2.CRMMATER]``` |
| 05 | MAJ_APPL | MAJ_APPL | [A10 ? [F1] | $\begin{array}{lc} \hline<1> & \text { [goto APP_SCR] } \\ <2, \mathrm{D}, \mathrm{R}> & \text { [goto CRMMATER] } \end{array}$ |

> | Prop Description Work Desc Total |
| :--- |
| (WRKDESC) $\quad$ (PRP5DESC) (TOTJBCST) |

| $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |  |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| 05 | APP_SCR | APP_SCR | [10 10 | ? [F1] | $\begin{aligned} & \text { <1-14> } \\ & \text { <D> } \end{aligned}$ | [goto APPL_X1] [goto CRMMATER] |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | Which of the following appliances or equipment were included? <br> Enter up to six, separate with commas. <br> 1. Cooking stove, range, or oven <br> 2. Microwave oven <br> 3. Refrigerator or Home Freezer <br> 4. Built-in dishwasher <br> 5. Portable dishwasher <br> 6. Garbage disposal <br> 7. Clothes washer <br> 8. Clothes dryer <br> 9. Range hood <br> 10. Smoke alarms and detectors <br> 11. Trash compactor <br> 12. Window air conditioner <br> 13. Portable cooling and heating equipment <br> 14. Other major home appliances and equip. |  |
| 05 | APPL_X1 | APPL_X1 | What was the total cost for (description for 1st selection)? | <1-999999> [IF It 5 or gt 4000 then goto ERR1_APPLX1] [ELSEIF there is a second selection in <br> APP_SCR, goto APPL_X2] <br> [ELSE goto CRMMATER] <br> <D,R> [IF there is a second selection in APP_SCR, goto APPL_X2] <br> [ELSE goto CRMMATER] |
| 05 | APPL_X2 | APPL_X2 | What was the total cost for (description for 2nd selection)? | <1-999999> [if APPL_X2 It 5 or gt 4000 then goto ERR1_APPLX2] <br> [ELSEIF there is a third selection in APP_SCR, goto APPL_X3] <br> [ELSE goto CRMMATATER] <br> $<D, R>$ [IF there is a third selection in APP_SCR, goto APPL_X3] <br> [ELSE goto CRMMATER] |
| 05 | APPL_X3 | APPL_X3 | What was the total cost for (description of 3rd selection)? | <1-999999> [if APPL_X3 It 5 or gt 4000 then goto ERR1_APPLX3] <br> [ELSEIF there is a fourth selection in APP_SCR, goto APPL_X4] <br> [ELSE goto CRMMATMER] |

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  |  | <D,R> [IF there is a fourth selection in APP_SCR, goto APPL_X4] <br> [ELSE goto CRMMATER] |
| 05 | APPL_X4 | APPL_X4 | What was the total cost for (description of 4th selection)? | <1-999999> [IF APPL_X4 It 5 or gt 4000 then goto ERR1_APPLX4] <br> [ELSEIF there is a fifth selection in APP_SCR, goto APPL_X5] <br> [ELSE goto CRMMATER] |
|  |  |  |  | <D,R> [IF there is a fifth selection in APP_SCR, goto APPL_X5] <br> [ELSE goto CRMMATER] |
| 05 | APPL_X5 | APPL_X5 | What was the total cost for (description for 5th selection)? | <1-999999> [IF APPL_X5 It 5 or gt 4000 then goto ERR1_APPLX5] <br> [ELSEIF there is a sixth selection in APP_SCR, goto APPL_X6] <br> [ELSE goto CRMMATER] |
|  |  |  |  | <D,R> [IF there is a sixth selection in APP_SCR, goto APPL_X6] <br> [ELSE goto CRMMATER] |
| 05 | APPL_X6 | APPL_X6 | What was the total cost for (description for 6th selection)? | ```<1-999999> [IF APPL_X6 It 5 or gt 4000 then goto ERR1_APPLX6] [ELSE goto BSECT5.BBLOCKA.BROW.ROWA2.CRMMATER]``` |
|  |  |  |  | ```<D,R> [goto BSECT5.BBLOCKA.BROW.ROWA2.CRMMATER]``` |
| 05 | CRMMATER | CRMMATER | Since the first of ^REF_MONTH, have ^YOU_ANYMEM PURCHASED any materials, supplies, tools or equipment for doing this job? | $<1>$[IF INTNMBR $=2-5$ goto SUPPLYX3] <br> $[$ ELSEIF INTNMBR $=1$ goto SUPPLYX1] |
|  |  |  | Prop Description Work Desc Total (WRKDESC) (PRP5DESC) (TOTJBCST) | <2, $\mathrm{D}, \mathrm{R}>$ [goto TOOLRENT] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 05 | SUPPLYX3 | SUPPLYX3 | What was the total cost for all items ^YOU_YRCU purchased for this job in ^REF_MONTH? Prop Description Work Desc Total | <0-999999> [IF (CRMCODEB $=100$ and SUPPLYX3 gt 7000) OR $\quad$ (CRMCODEB $=110-150$ and SUPPYX3 gt |
|  |  |  | (WRKDESC) (PRP5DESC) (TOTJBCST) | $\begin{aligned} & \text { 2500) OR } \\ & \text { 1000) then } \end{aligned}$ |

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  |  | goto ERR1_SUPPLYX3] [ELSE goto SUPPLYX2] <D,R> $\quad$ [goto SUPPLYX2] |
| 05 | SUPPLYX2 | SUPPLYX2 | What was the total cost for all items ^YOU_YRCU purchased for this job in ^TWO_MONTH? |  |
| 05 | SUPPLYX1 | SUPPLYX1 | What was the total cost for all items ^YOU_YRCU purchased for this job in ^LAST_MONTH? | $<0-999999>$ <br> $7000)$ OR [IF (CRMCODEB $=100$ and SUPPLYX1 gt <br> $2500) ~ O R ~$ (CRMCODEB $=110-150$ and SUPPLYX1 gt <br> 1000 (CRMCODEB $=160-310$ and SUPPLYX1 gt <br>  goto ERR1_SUPPLYX1] <br> [ELSE goto SUPPLYX0]  <br> $<D, R>$ [goto SUPPLYX0] |
| 05 | SUPPLYX0 | SUPPLYX0 | What was the total cost for all items ^YOU_YRCU purchased for this job in (current month)? |  |

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  |  | SUPPLYXO = D goto SUPPLYX] [ELSE goto TOOLRENT] |
| 05 | SUPPLYX | SUPPLYX | Since the first of ^REF_MONTH, what was the total cost of all items ^YOU_YRCU purchased for this job? | <0-999999> [IF (CRMCODEB = 100 and SUPPLYX gt 7000) OR <br> (CRMCODEB $=110-150$ and SUPPLYX gt |
|  |  |  |  |  |
|  |  |  |  | 2500) OR |
|  |  |  |  | 1000) then goto ERR1_SUPPLYX] [ELSE goto TOOLRENT] |
|  |  |  |  |  |
|  |  |  |  | <D,R> [goto TOOLRENT] |
| 05 | TOOLRENT | TOOLRENT | Since the first of ^REF_MONTH, have ^YOU_ANYMEM RENTED any tools or equipment for doing this job? | $<1>$ [IF INTNMBR $=2-5$ goto TOOLRTX3] [IF INTNMBR $=1$ goto TOOLRTX1] |
|  |  |  |  | <2,D,R> [goto REIMBRS] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 05 | TOOLRTX3 | TOOLRTX3 | What was the total cost for all items ^YOU_YRCU rented for this job in ^REF_MONTH? | <0-999999> [IF TOOLRTX3 gt 400 then goto ERR1_TOOLRTX3] <br> [ELSE goto TOOLRTX2] |
|  |  |  |  |  |
|  |  |  |  | <D,R> [goto TOOLRTX2] |
| 05 | TOOLRTX2 | TOOLRTX2 | What was the total cost for all items ^YOU_YRCU rented for this job in ^TWO_MONTH? | <0-999999> [IF TOOLRTX2 gt 400 then goto ERR1_TOOLRTX2] <br> [ELSE goto TOOLRTX1] |
|  |  |  |  |  |
| 05 | TOOLRTX1 | TOOLRTX1 | What was the total cost for all items ^YOU_YRCU rented for this job in ^LAST_MONTH? | ```<0-999999> [IF TOOLRTX1 gt 400 then goto ERR1_TOOOLRTX1] [ELSE goto TOOLRTX0]``` |
|  |  |  |  |  |
| 05 | TOOLRTX0 | TOOLRTX0 | What was the total cost for all items ^YOU_YRCU rented for this job in (current month)? | ```<0-999999,D,R> [IF TOOLRTX0 gt 400 goto ERR1_TOOLRTX0] [ELSEIF INTNMBR = 2-5 and (TOOLRTX3 \(=\mathrm{D}\) or TOOLRTX2 \(=\mathrm{D}\) or TOOLRTX1 \(=\mathrm{D}\) or TOOLRTX0 \(=\) D ) goto TOOLRTX] [ELSEIF INTNMBR = 2-5 and (TOOLRTX3 \(=0\) and TOOLRTX2 \(=0\) and TOOLRTX1 \(=0\) and TOOLRTXO = 0) then goto CK_TOOLRTX] [ELSEIF INTNMBR = 1 and TOOLRTX1 = 0 and TOOLRTX0 \(=0\) goto CK_TOOLRTX]``` |
|  |  |  |  |  |

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 1. Dwellings under construction including a vacation home or second home <br> 2. Building an addition to the house or a new structure such as a porch, garage, or new wing <br> 3. Finishing a basement or an attic or enclosing a porch <br> 4. Remodeling one or more rooms in the house <br> 5. Landscaping the ground or planting new shrubs or trees <br> 6. Build outdoor patios, walks, fences, or other enclosures, driveways, or permanent swimming pools or hot tubs <br> 7. Repair outdoor patios, walks, fences <br> 8. Inside painting or papering <br> 9. Outside painting <br> 10. Plastering or paneling <br> 11. Plumbing or water heating installations or repairs <br> 12. Electrical work <br> 13. Heat or air conditioning jobs <br> 14. Flooring repair or replacement, including wood, vinyl, and tile <br> 15. Wall-to-wall carpet - original installation <br> 16. Wall-to-wall carpet - replacement <br> 17. Insulation <br> 18. Roofing, gutters, or downspouts <br> 19. Siding <br> 20. Installation, repair, replacement of window panes, screens, storm doors, awnings, and the like <br> 21. Masonry, brick or stucco <br> 22. Other improvements or repairs <br> 77. Misc. combined (unable to specify/DK) |  |
| 05 | MATNSPEC | MATNSPEC | Since the first of ^REF_MONTH, excluding this month, have ^YOU_ANYMEM purchased any materials or supplies NOT FOR ANY SPECIFIC JOB? <br> 1. Yes <br> 2. No | $\begin{array}{ll} \hline<1> & \text { [goto MATNSPCX] } \\ <2, \mathrm{D}, \mathrm{R}> & \text { [goto S5_END] } \end{array}$ |
| 05 | MATNSPCX | MATNSPCX | What was the total cost? | ```<1-999999> [IF It 5 or gt 600 then goto ERR1_MATNSPCX] [ELSE goto S5_END] <D,R> [goto S5_END]``` |
|  | S6A_INTRO | S6A_INTRO | [14 11 <br> Now I am going to ask about the purchase or rental of major household appliances. <br> Please include any shipping and handling charges with the cost of any item that was shipped. $\begin{aligned} & \text { Description Type } \\ & \text { (MAJTYPE) (Purchased/ (MAJ_MO) (MAJPURXI } \\ & \text { Rented) } \\ & \hline \end{aligned}$ | <1> [BTABLEA.BROW.ITEM] |

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 1. Enter 1 to Continue |  |
| 06A | APA_ITEM | ITEM | [14 11 ? [F1] | <1-11> [goto DESCRIPTION] |
|  |  |  | Since the first of ^REF_MONTH, have ^YOU_ANYMEM purchased or rented any of the following items for your household or for someone outside of your household? <br> Read each item on list. | $\begin{array}{ll} <99> & \text { [goto S6A_END] } \\ <888> & \text { [goto ITEM - next line of grid] }] \\ & {[\text { IF no more grid lines goto S6A_END] }} \end{array}$ |
|  |  |  | 1. Microwave oven <br> 2. Cooking stove, range or oven <br> 3. Range hood <br> 4. Refrigerator or home freezer <br> 5. Built-in dishwasher <br> 6. Portable dishwasher <br> 7. Garbage disposal <br> 8. Clothes washer <br> 9. Clothes dryer <br> 99. None/No more entries <br> 888. Delete the line |  |
| 06A | MAJTYPE | DESCRIPTION | What did you purchase or rent? | <30 characters> [goto WHO] |
|  |  |  | Enter brief description of the item <br> Description Type Month Amount <br> (MAJTYPE) (Purchased/ (MAJ_MO) (MAJPURXI Rented) MAJRENTX |  |
| 06A | GFTC_MAJ | WHO | Was this item - | $\begin{array}{lc} \hline<1,3, \mathrm{D}, \mathrm{R}> & \text { [goto MONTH] } \\ <2> & \text { [goto AMOUNT] } \end{array}$ |
|  |  |  | 1. Purchased for someone inside the household? <br> 2. Rented? <br> 3. Purchased for someone outside your household? |  |
| 06A | MAJ_MO | MONTH | When did you purchase it? <br> Description Type Month Amount <br> (MAJTYPE) (Purchased/ (MAJ_MO) (MAJPURXI Rented) MAJRENTX | <REF_MONTH - CUR_MONTH> [IF entry is not in the reference period then go to ERR3_MONTH] <br> [ELSE goto AMOUNT] <br> <D,R> [goto AMOUNT] |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 1. January <br> 2. February <br> 3. March <br> 4. April <br> 5. May <br> 6. June <br> 7. July <br> 8. August <br> 9. September <br> 10. October <br> 11. November <br> 12. December |  |
| 06 | MAJ_AMOUNT | AMOUNT | (What was the total rental expense since the first of (reference month) not including (current month |  |
| 06A | MAJTAX | TAX | Did this include sales tax? | <1,2, D, R> [goto INSTALL] |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | $\frac{\text { Description Type Month Amount }}{\text { (MAJTYPE) (Purchased/ (MAJ_MO) (MAJPURXI }}$ Rented) MAJRENTX |  |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 06 | INSTALL | INSTALL | Were there any extra charges for installation or delivery? <br> Include charges for disposal of old appliances. | $<1>$ [goto INST] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto C] |
|  |  |  |  |  |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 06A | MAJINSTX | INST | How much? | <1-999999> [IF (MAJAPPLY = 100 and INST gt 800) OR (MAJAPPLY = 120 and INST gt 250) OR (MAJAPPLY = 140 and INST gt 275) OR (MAJAPPLY = 160 and INST gt 200) OR (MAJAPPLY = 170 and INST gt 50) OR (MAJAPPLY $=180$ and INST gt 400) OR (MAJAPPLY = 190 and INST gt 50) OR (MAJAPPLY = 200 and INST gt 50) OR (MAJAPPLY = 210 and INST gt 50) THEN goto ERR1_INST] [ELSE goto C] |
|  |  |  |  | <D,R> [goto C] |
| 06 | MAJCMB_S | C | - Enter 'C' for a combined expense | <C> $\quad$ [goto COMBCODE] <empty> $\quad$ [goto MORE] [IF anything other than a 'C' or the Enter key is entered, go to CK_C] |
| 06 | MAJCMB | COMBCODE | [A1 11 ? [F1] | <1-9,77> [goto MORE] |
|  |  |  | What other appliances is the (Appliance description) combined with? <br> Enter all that apply, separate with commas |  |

Consumer Expenditure Quarterly Survey 2011 Items Booklet

| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 1. Microwave oven <br> 2. Cooking stove, range or oven <br> 3. Range hood <br> 4. Refrigerator or home freezer <br> 5. Built-in dishwasher <br> 6. Portable dishwasher <br> 7. Garbage disposal <br> 8. Clothes washer <br> 9. Clothes dryer <br> 77. Misc. combined (unable to specify/DK) |  |
| 06 | MAJOTHER | MORE | Did you purchase or rent any other (Appliance Description)? | <1> $\quad$[IF ROW number $=7$, goto ERR_MAX] <br> [ELSE goto ITEM, next row of grid] $]$$<2, \mathrm{D}, \mathrm{R}>\quad$ [goto ITEM, next row of grid] |
|  |  |  | 1. Yes <br> 2. No |  |
|  | S6B_INTRO | S6B_INTRO | [12-17 12 - | <1> [ITEM] |
|  |  |  | Now I am going to ask about expenses for the puchase or rental of household appliances and other selected items. Please include any shipping and handling charges with the cost of any item that was shipped. <br> 1. Enter 1 to Continue |  |
| 06B | APB_ITEM | ITEM | SCREEN 1 <br> [E] 22-24 <br> ? [F1] <br> Since the first of $\wedge$ REF_MONTH, have $\wedge$ YOU_ANYMEM purchased or rented any of the following items? <br> * Read each item on list <br> SCREEN 2 $\qquad$ 25 ? [F1] <br> Have ^YOU_ANYMEM purchased or rented any -- | $<1-43>$ [goto DESCRIPTION] <br> $<95>$ [goto next row] <br> $<99>$ [goto S6B_END] <br> $<888>$ [goto ITEM - next line of grid] $]$ <br>  [If no more grid lines goto S6B_END] |

```
SCREEN 3-------------------------------------
```

[17-17 ? [F1]
Have ^YOU_ANYMEM purchased or rented any --
4 Read each item on list

SCREEN 4 $\qquad$

Have ^YOU_ANYMEM purchased or rented any --
4 Read each item on list

Screen 5 -
Have ^YOU_ANYMEM purchased or rented any --

- Read each item on list

Screen 6
Have ^YOU_ANYMEM purchased any --

- Read each item on list

1. Small elec kitchen appl
2. Elec personal care app
. Elec personal car
3. Elec floor cleaning equip
4. Other household appl
5. Other household a
. Sewing machines
6. Office machine
7. Personal digital assistants or PDA's


- Enter a brief description of item.
(Report items such as flash drives, memory cards, recordable discs, and tapes as code 13, Portable me

Consumer Expenditure Quarterly Survey 2011 Items Booklet

| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
| Description Type Month Amount <br> (MINTYPE) (Purchased/ (MIN_MO) (MINPURXI  <br> Rented) MINRENTX) |  |  |  |  |
| 06B | GFTCMIN | WHO | Was this item ... | $\begin{aligned} & \hline<1-3, \mathrm{D}, \mathrm{R}> \\ & <2> \end{aligned} \quad \text { [goto MONTH] }{ }_{\text {[goto AMOUNT] }}$ |
| 1. Purchased for someone inside the household? <br> 2. Rented? <br> 3. Purchased for someone outside your household? |  |  |  |  |
| 06B | MIN_MO | MONTH | When did you purchase it? <br> Description Type Month Amount <br> (MINTYPE) (Purchased/ (MIN_MO) (MINPURX/ Rented) MINRENTX) <br> 1. January <br> 2. February <br> 3. March <br> 4. April <br> 5. May <br> 6. June <br> 7. July <br> 8. August <br> 9. September <br> 10. October <br> 11. November <br> 12. December | <REF_MONTH - CUR_MONTH> [IF MONTH not in reference period, goto ERR3_MONTH [ELSE goto AMOUNT] <br> <D,R> [goto AMOUNT] |
|  |  | AMOUNT | (What was the total rental expense since the first of (reference month) not including (current month)?/What did it cost?) $\begin{aligned} & \text { Description Type } \\ & \text { Month Amount } \\ & \text { MINTYPE) (Purchased/ (MIN_MO) (MINPURXI } \\ & \text { Rented) } \\ & \text { MINRENTX } \end{aligned}$ | <1-999999> [IF (WHO = 1, 3, D or R) AND ( (MINAPPLY $=230$ and AMOUNT It 6 or gt 200) OR (MINAPPLY $=240$ and AMOUNT It 5 or gt 125) OR (MINAPPLY $=250$ and AMOUNT It 5 or gt 250) OR (MINAPPLY $=260$ and AMOUNT It 15 or gt 600) OR (MINAPPLY = 270 and AMOUNT It 6 or gt 896) OR (MINAPPLY $=280$ and AMOUNT It 8 or gt 4000) OR (MINAPPLY $=300$ and AMOUNT It 6 or gt 1068) OR (MINAPPLY $=310$ and AMOUNT It 5 or gt 2500) OR (MINAPPLY $=320$ and AMOUNT It 11 or gt 700) OR (MINAPPLY $=330$ and AMOUNT It 5 or gt 250) OR (MINAPPLY $=340$ and AMOUNT It 15 or gt 940) OR (MINAPPLY = 350 and AMOUNT It 5 or gt 400) OR (MINAPPLY $=365$ and AMOUNT It 10 or gt 4200) OR (MINAPPLY $=390$ and AMOUNT It 25 or gt 886) OR (MINAPPLY $=395$ and AMOUNT It 25 or gt 650) OR (MINAPPLY $=400$ and |



| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 06 | MINCMB_S | C | * Enter 'C' for a combined expense. | <C> [goto COMBCODE] <br> <empty> $[$ IF ITEM $=10,25,27,31$ or 32, goto INSTLSCR $]$ <br>  $[$ ELSE goto MORE] $]$ |
|  |  |  |  | [If anything other than a ' C ' or the Enter key is entered, goto CK_C] |
|  | MINCMB | COMBCODE | $\text { [AI 12-17 ? } \mathrm{F} 1]$ | $<1-43,77>$ $[$ [f ITEM $=10,25,27,31$ or 32 goto INSTLSCR $]$ <br> $[$ ELSE goto MORE $]$  |

- Enter all that apply, separate with commas.

1. Small elec kitchen appl
2. Elec personal care appl
3. Smoke detectors
4. Elec floor cleaning equip
5. Other household appl
. Sewing machines
6. Office machines
7. Personal digital assistants or PDA's
. Digital book readers
8. Computers, computer systems, or related hardware
9. Computer software including computer games, for non-business use
10. Computer accessories
11. Portable memory, such as flash drives, memory cards, and recordable discs and tapees
12. Video game hardware or accessories
13. Video games
14. Telephones or accessories
15. Telephone answering machines
16. Photographic equipment
17. Musical instruments, supplies, and accessories
18. Lawn mowing machinery or other yard equipment
19. Power Tools
20. Non-power tools
21. Window air conditioners
22. Portable cooling or heating equipment
23. Televisions, all types
24. DVD Players, VCRs, DVRs, or video cameras

| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 27. Satellite dishes, receivers or accessories <br> 28. Handheld personal music players <br> 29. Radios, all types <br> 30. Tape recorders or players <br> 31. Sound components, component systems, or disc sound systems <br> 32. Other sound or video equipment, including accessories <br> 33. General sports equipment (exclude athletic shoes for sports related use, such as football, baseball, soccer or bowling) <br> 34. Health and exercise equipment <br> 35. Camping equipment <br> 36. Hunting and fishing equipment <br> 37. Winter sports equipment <br> 38. Water sports equipment <br> 39. Outboard motors <br> 40. Bicycles <br> 41. Tricycles or battery powered riders <br> 42. Playground equipment <br> 43. Other sports or recreation equipment <br> 77. Misc. combined (unable to specify/DK) |  |
| 06B | INSTLSCR | INSTLSCR | Were there any additional charges for installation or set-up? <br> 1. Yes <br> 2. No | $\begin{aligned} & \text { <1> } \quad \text { [goto INSTELLEX] } \\ & <2, \mathrm{D}, \mathrm{R}>\text { [goto MORE] } \end{aligned}$ |
| 06B | INSTLLEX | INSTLLEX | How much? | ```<1-99999> [IF INSTLLEX It 40 or gt 1000 goto ERR1_INSTLLEX] [ELSE goto MORE] <D,R> [goto MORE]``` |
| 06 | S6BOTHER | MORE | Did you purchase or rent any other (description)? <br> Description Type Month Amount (MINTYPE) (Purchased/ (MIN_MO) (MINPURXI Rented) MINRENTX) <br> 1. Yes <br> 2. No | $<1>$[IF Row number $=34$ goto ERR_MAX] <br> [ELSE goto ITEM, next line on the grid]$<2, \mathrm{D}, \mathrm{R}>\quad$ [goto ITEM, next line on the grid] |
| 07 | S7_INTRO | S7_INTRO | [4] 18 | <1> [goto BTable.Brow.ITEM] |

[^1]| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | (RPRDESC) (RPAIRTYP) (SRVCMOB) (REPAIRX) |  |
|  |  |  | 1. Enter 1 to Continue |  |
| 07 | EQB_ITEM | ITEM | SCREEN 1 $\qquad$ <br> 18 <br> ? [F1] | <1-11> [goto DESCRIPTION] <br> $<95>$ [goto next row] <br> $<99>$ [goto S7_END] <br> $<888>$ [goto ITEM - next line of grid] <br>   <br>  [If no more grid lines goto S7_END] |
|  |  |  | Since the first of ^REF_MONTH, did ^YOU_ANYMEM have any maintenance or repair expenses for any of the following items? |  |
|  |  |  | - Read each item on list |  |
|  |  |  | SCREEN 2 $\qquad$ <br> 18 ? [F1] |  |
|  |  |  | Did ^YOU_ANYMEM have any expenses for service contracts for the items I just asked about or for heating or air conditioning equipment? |  |
|  |  |  | - IF YES - Read each item on list |  |
|  |  |  | What is the service contract for? |  |
|  |  |  | 1. Garbage disposal, range hood, or built-in dishwasher |  |
|  |  |  | 2. Other household appliances, such as washer, refrigerator, or range/oven |  |
|  |  |  | 3. Television, radio, video, or sound equipment, except those installed in autos or other vehicles |  |
|  |  |  | 4. Computers, computer systems, or related equipment for non-business use |  |
|  |  |  | 5 . Lawn or garden equipment |  |
|  |  |  | 6. Musical instruments or accessories |  |
|  |  |  | 7. Hand or power tools |  |
|  |  |  | 8. Photographic equipment |  |
|  |  |  | 9. Sport or recreational equipment |  |
|  |  |  | 10. Termite or pest control |  |
|  |  |  | 11. Heating/air conditioning equipment |  |
|  |  |  | 95. Continue list |  |
|  |  |  | 99. None/No more entries |  |
| 07 | RPRDESC |  | What (was serviced or repaired/is covered by the service contract)? | <30 characters> [goto MONTH] |
|  |  |  | Description Expense Type Month Amount <br> (RPRDESC) (RPAIRTYP) (SRVCMOB) (REPAIRX) |  |

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
| 07 | SRVCMOB | MONTH | In what month was the (service or repair done/service contract purchased)? <br> 1. January <br> 2. February <br> 3. March <br> 4. April <br> 5. May <br> 6. June <br> 7. July <br> 8. August <br> 9. September <br> 10. October <br> 11. November <br> 12. December | <REF_MONTH-CUR_MONTH> [IF entry is not in the reference period then goto ERR3_MONTH] [ELSE goto AMOUNT] <D,R> [goto AMOUNT] |
| 07 | REPAIRX | AMOUNT | What was the total cost? | <1-999999> [IF (APPRPRYB = 100 and AMOUNT It 7 or gt 285) OR (APPRPRYB $=110$ and AMOUNT It 5 or gt 324) OR (APPRPRYB $=120$ and AMOUNT It 5 or gt 478) OR (APPRPRYB $=130$ and AMOUNT It 5 or gt 400) OR (APPRPRYB $=140$ and AMOUNT It 5 or gt 600) OR (APPRPRYB $=150$ and AMOUNT It 5 or gt 550) OR (APPRPRYB $=160$ and AMOUNT It 20 or gt 398) OR (APPRPRYB $=170$ and AMOUNT It 5 or gt 1332) OR (APPRPRYB $=190$ and AMOUNT It 16 or gt 742) OR (APPRPRYB $=200$ and AMOUNT It 8 or gt 900) OR (APPRPRYB $=220$ and AMOUNT It 11 or gt 413) then goto ERR1_AMOUNT] <br> [ELSEIF APPRPRYB and the entry in AMOUNT for this record are equal to any records data in the prechart/input then goto ERR_DUP] <br> [ELSE goto REPAIRTX] <br> <D,R> [goto C] |
| 07 | REPAIRTX | REPAIRTX | Did this include sales tax? <br> 1. Yes <br> 2. No | <1, 2, D, R> [goto C] |
| 07 | RPRCB_S | C | * Enter 'C' for a combined expense. | <C> [goto COMBCODE] <br> <empty> [goto MORE] |

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| Section Tag Name | Variable Name | Question Text | Skip Instructions |  |
| :---: | :---: | :---: | :---: | :---: |
|  |  | [4] 19-20 ? [F1] | <99> | [goto S8A_END] <br> goto ITEM - next line of grid] |
|  |  | Since the first of ^REF_MONTH, have ^ YOU_ANYMEM purchased for ^YOU_YRCU or for someone outside of your household any -- |  | [lf no more grid lines goto S8A_END] |
|  |  | - Read each item on list |  |  |
|  |  |  |  |  |
|  |  | [A 21 ? [F1] |  |  |
|  |  | Have ^YOU_ANYMEM purchased any -- |  |  |
|  |  | Read each item on list |  |  |
|  |  |  |  |  |
|  |  | [4] 21 ? $\left.{ }^{\text {[1] }}\right]$ |  |  |
|  |  | Have ^YOU_ANYMEM purchased any -- |  |  |


[期 21 ? [F1]
Have ^YOU_ANYMEM purchased any --

- Read each item on list

1. Sofas?
2. Living room chairs?
3. Living room chairs?
4. Living room tables?
5. Wall units, shelves or cabinets?
6. Ping-pong, pool tables or other similar recreation room items?
7. Ping-pong, pool tables or other similar recreation room items?
8. Other living room, family or recreation
9. Living room furniture combinations?

| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 8. Dining room or kitchen furniture? <br> 9. Mattresses or box springs? <br> 10. Bedroom furniture other than mattresses or box springs? <br> 11. Infants furniture <br> 12. Infants equipment <br> 13. Patio, porch, or outdoor furniture <br> 14. Barbeque grills or outdoor decorative items <br> 15. Office furniture for home use <br> 16. Lamps or other lighting fixtures <br> 17. Other household decorative items <br> 18. Closet storage items <br> 19. Travel items including luggage <br> 20. Plastic dinnerware <br> 21. China or other dinnerware <br> 22. Stainless, silver or other flatware <br> 23. Glassware <br> 24. Serving pieces other than silver <br> 25. Non-electric cookware <br> 26. Silver serving pieces <br> 27. Bedroom linens <br> 28. Bathroom linens <br> 29. Kitchen or dining room linens <br> 30. Other linens <br> 31. Slipcovers, decorative pillows or cushions <br> 32. Orig. wall-to-wall carpet <br> 33. Replacement wall-to-wall carpet <br> 32. Room size rugs or other non-permanent floor coverings, including carpet squares <br> 33. Curtains or drapes <br> 34. Blinds, shades or other window coverings <br> 95. Continue <br> 99. None/No more entries <br> 888. Delete the line |  |
| 08A | FURNDESC | DESCRIPTION | What did you purchase? $\begin{aligned} & \text { Item Month Amount } \\ & \text { (FURNDESC)(FURNMO) (FURNPURX) } \end{aligned}$ | <30 characters> [goto MONTH] |
| 08A | FURNMO | MONTH | In what month did you purchase it? $\frac{\text { Item Month Amount }}{(\text { FURNDESC)(FURNMO) }} \text { (FURNPURX) }$ <br> 1. January <br> 2. February <br> 3. March | <REF_MONTH - CUR_MONTH> [IF entry is not in reference <br> period then goto <br> ERR3_MONTH] <br> [ELSE goto WHO] <br> <D,R> [goto WHO] |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 4. April <br> 5. May <br> 6. June <br> 7. July <br> 8. August <br> 9. September <br> 10. October <br> 11. November <br> 12. December |  |
| 08A | FURNGFTC | WHO | Was this purchased for your household or for someone outside of your household? $\left.\frac{\text { Item }}{(\text { FURNDESC }) \quad \text { Month }} \text { (FURNMO) Amount }\right) ~(F U R N P U R X)$ <br> 1. For use by household <br> 2. For someone outside the household | <1,2,D,R> [goto AMOUNT] |
| 08A | FURNPURX | AMOUNT | What was the purchase price? $\begin{aligned} & \text { Item Month Amount } \\ & \text { (FURNDESC)(FURNMO) (FURNPURX) } \end{aligned}$ | <1-999999> [IF (FURNPURY = 100 and AMOUNT It 21 or gt 3000) OR (FURNPURY = 101 and AMOUNT It 10 or gt 1939) OR (FURNPURY = 102 and AMOUNT It 5 or gt 1500) OR (FURNPURY = 103 and AMOUNT It 11 or gt 1700) OR (FURNPURY = 104 and AMOUNT It 21 or gt 3500) OR (FURNPURY $=105$ and AMOUNT It 11 or gt 2400) OR (FURNPURY = 106 and AMOUNT It 73 or gt 7000) OR (FURNPURY = 110 and AMOUNT It 15 or gt 4309) OR (FURNPURY = 120 and AMOUNT It 25 or gt 1679) OR (FURNPURY = 121 and AMOUNT It 10 or gt 3500) OR (FURNPURY = 130 and AMOUNT It 10 or gt 1065) OR (FURNPURY = 131 and AMOUNT It 7 or gt 500) OR (FURNPURY $=140$ and AMOUNT It 5 or gt 900) OR (FURNPURY = 141 and AMOUNT It 6 or gt 965) OR (FURNPURY $=150$ and AMOUNT It 10 or gt 1300) OR (FURNPURY $=171$ and AMOUNT It 5 or gt 450) OR (FURNPURY = 173 and AMOUNT It 5 or gt 531) OR (FURNPURY $=180$ and AMOUNT It 5 or gt 317) OR (FURNPURY $=181$ and AMOUNT It 5 or gt 423) OR (FURNPURY $=190$ and AMOUNT It 5 or gt 100) OR (FURNPURY = 191 and AMOUNT It 5 or gt 416) OR (FURNPURY $=192$ and AMOUNT It 5 or gt 298) OR (FURNPURY $=193$ and AMOUNT It 5 or gt 194) OR (FURNPURY $=195$ and AMOUNT It 5 or gt 193) OR (FURNPURY $=196$ and AMOUNT It 5 or gt 300) OR (FURNPURY $=198$ and AMOUNT It 5 or gt 250) OR (FURNPURY $=200$ and AMOUNT It 6 or gt 374) OR (FURNPURY $=201$ and AMOUNT It 5 or gt 200) OR |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  |  | (FURNPURY = 202 and AMOUNT It 5 or gt 127) OR (FURNPURY = 203 and AMOUNT It 5 or gt 300) OR (FURNPURY $=205$ and AMOUNT It 5 or gt 290) OR (FURNPURY $=212$ and AMOUNT It 5 or gt 1100) OR (FURNPURY = 214 and AMOUNT It 5 or gt 1035) OR (FURNPURY $=215$ and AMOUNT It 5 or gt 1643) then goto ERR1_AMOUNT] <br> [ELSEIF FURNPURY and the entry in AMOUNT for this record are equal to any records data on the pre-chart/input then goto ERR_DUP] <br> [ELSE goto TAX] <br> <D,R> [goto C] |
| 08A | FRNPURTX | TAX | Did this include sales tax? Item Month Amount (FURNDESC)(FURNMO) (FURNPURX) <br> 1. Yes <br> 2. No | <1,2, D,R> [goto C] |
| 08A | S8ACMB_S | C | * Enter 'C' for a combined expense | <C> [goto COMBCODE] <empty> $\quad$ [goto MORE] [IF anything other than an 'C' or the Enter key is entered goto CK_C] |
| 08A | S8A_CMB | COMBCODE | [14 19-22 ? [F1] <br> What was combined with (description)? <br> Enter all that apply, seperate with commas. <br> $\frac{\text { Item Month Amount }}{(\text { FURNDESC (FURNMO) }}$ (FURNPURX) <br> 1. Sofa <br> 2. Living room chairs <br> 3. Living room tables <br> 4. Wall units, shelves or cabinets <br> 5. Ping-pong, pool tables or other similar recreation items <br> 6. Other living room, family or recreation room furniture including desks <br> 7. Living room furniture combinations <br> 8. Dinning room or kitchen furniture cushions <br> 9. Mattresses or box springs <br> 10. Bedroom furniture other than mattresses or box springs <br> 11. Infants furniture | <1-34,77> [goto MORE] |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 12. Infants equipment <br> 13. Patio, porch, or outdoor furniture <br> 14. Barbeque grills or outdoor decorative items <br> 15. Office furniture for home use <br> 16. Lamps or other lighting fixtures <br> 17. Other household decorative items <br> 18. Closet storage items <br> 19. Travel items including luggage <br> 20. Plastic dinnerware <br> 21. China or other dinnerware <br> 22. Stainless, silver or other flatware <br> 23. Glassware <br> 24. Serving pieces other than silver <br> 25. Non-electric cookware <br> 26. Silver serving pieces <br> 27. Bedroom linens <br> 28. Bathroom linens <br> 29. Kitchen or dining room linens <br> 30. Other linens <br> 31. Slipcovers, decorative pillows or cushions <br> 32. Orig. wall-to-wall carpet <br> 33. Replacement wall-to-wall carpet <br> 32. Room size rugs or other non-permanent floor coverings, including carpet squares <br> 33. Curtains or drapes <br> 34. Blinds, shades or other window coverings <br> 77. Misc. Combined (unable to specify/DK) |  |
| 08A | ANYOTH8 | MORE | Did you purchase any other (description)? <br> Item Month Amount <br> (FURNDESC)(FURNMO) (FURNPURX) <br> 1. Yes <br> 2. No | <1> [IF ROW number = 34, goto ERR_MAX] <br> [ELSE goto ITEM, next line of grid] <br> <2, D,R> [goto ITEM, next line of grid] |
| 08B | FURNRNTL | FURNRNTL | Since the first of ^REF_MONTH, have ${ }^{\wedge}$ YOU_ANYMEM rented or leased any furniture? <br> 1. Yes <br> 2. No | $<1>$ [goto FURNRNTX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto REPFURN] |
| 08B | FURNRNTX | FURNRNTX | What was the total expense? | ```<1-99999> [IF FURNRNTX It 5 or gt 1340 goto ERR1_FURNRNTX] [ELSE goto FRNRNTCX] <D,R> [goto FRNRNTCX]``` |
| 08B | FRNRNTCX | FRNRNTCX | How much of the total amount was spent this month? | $\qquad$ |

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  |  | [ELSE goto REPFURN] |
|  |  |  |  | <D,R> [goto REPFURN] |
| 08 | REPFURN | REPFURN | Since the first of ^REF_MONTH, have ^YOU_ANYMEM had any expenses for repairing, refinishing or reupholstering furniture, including the cost for fabric? | $<1>$ [goto REPFURNX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto S8B_END] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 08B | REPFURNX | REPFURNX | What was the total expense? | $\begin{aligned} & \text { <1-999999> [IIF REPFURNX It } 5 \text { or gt } 1900 \text { goto } \\ & \text { ERR1_REPFURNX] } \\ & \text { [ELSE goto REPFRNCX] } \end{aligned}$ |
|  |  |  |  | <D,R> [goto REPFRNCX] |
| 08 | REPFRNCX | REPFRNCX | How much of the total amount was spent this month? | <0-999999> [IF REPFRNCX gt REPFURNX goto CK_REPFRNCX] <br> [ELSE goto S8B_END] |
|  |  |  |  | <D,R> [goto S8B_END] |
|  | S9A_INTRO | S9A_INTRO | CAI 23-24 | <1> [goto BSECT09.BTABLEA.BROW.ITEM] |
|  |  |  | Now I am going to ask about clothing and footwear, for infants, children, and adults. You may find it helpful to refer to receipts, credit card statements or other records to answer the questions. Please include any shipping and handling charges with the cost of any item that was shipped. <br> Description Name Month Amount <br> (CLODESCA) (CLONAME) (CLOTHMOA) (CLOTHXA) |  |
|  |  |  | 1. Enter 1 to Continue |  |
| 09A | CLA_ITEM | ITEM | SCREEN 1 $\qquad$ <br> 23-24 <br> ? [F1] | $<1-21>$ [goto DESCRIPTION] <br> $<95>$ [goto next row] <br> $<99>$ [goto S9A END] |
|  |  |  | Since the first of ^REF_MONTH, have ${ }^{\wedge}$ YOU_ANYMEM purchased any of the following items either for members of your household or for someone outside your household? | <888> [goto ITEM - next line of grid] <br> [IF no more grid lines goto S9A_END] |
|  |  |  | Read each item on list |  |
|  |  |  | SCREEN 1 $\qquad$ <br> 23-24 <br> [F1] |  |
|  |  |  | Have ^YOU_ANYMEM purchased any -- |  |

[^2]| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 1. Coats, jackets or furs <br> 2. Sport coats or tailored jackets <br> 3. Suits <br> 4. Vests <br> 5. Sweaters or sweater sets <br> 6. Pants, jeans or shorts <br> 7. Dresses <br> 8. Skirts <br> 9. Shirts, blouses or tops <br> 10. Undergarments <br> 11. Hosiery <br> 12. Nightwear or loungewear <br> 13. Accessories <br> 14. Swimsuits or warm-up or ski suits <br> 15. Uniforms, for which the cost is not reimbursed <br> 16. Costumes <br> 17. Footwear, including athletic footware <br> 18. Diapers <br> 19. Layettes <br> 20. Watches <br> 21. Jewelry <br> 95. Continue List <br> 99. None/No more entries <br> 888. Delete the line |  |
| 09A | CLODESCA | DESCRIPTION | What did you buy? <br> Describe briefly the item purchased. <br> Description Name Month Amount (CLODESCA) (CLONAME) (CLOTHMOA) (CLOTHXA) | <30 characters> [goto CLOINOUT] |
| 09A | CLOINOUT | CLOINOUT | Was this (were these) purchased for someone inside or outside of your household? <br> 1. Inside your household <br> 2. Outside your household <br> 3. Both inside and outside your household | $<1>$ [goto FORWHOM] <br> $<2,3>$ [goto FOROUTCU] <br> $<$ D,R> [goto MONTH] |
|  | FORWHOM | FORWHOM | For whom was it purchased? <br> Enter all that apply, separate with commas. <br> 1. NAME[1] | $<1-30,77, R>$ [IF entry greater than number of people in household or if inactive/deleted/non-CU members are slected then goto <br> CK_FORWHOM] <br> [ELSEIF more than 1 person is selected goto |



| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | Description Name Month Amount (CLODESCA) (CLONAME) (CLOTHMOA) (CLOTHXA) <br> 1. January <br> 2. February <br> 3. March <br> 4. April <br> 5. May <br> 6. June <br> 7. July <br> 8. August <br> 9. September <br> 10. October <br> 11. November <br> 12. December | [ELSE goto AMOUNT] <D,R> [goto AMOUNT] |
| 09 | CLOTHXA | AMOUNT | How much did ^IT_THEY_9A cost? | <1-999999> [IF (CLOTHYA = 100 And AMOUNT It 9 or gt 400) OR (CLOTHYA = 110 and AMOUNT It 10 or gt 500) OR (CLOTHYA = 120 and AMOUNT It 18 or gt 1000)OR (CLOTHYA $=130$ and AMOUNT It 5 or gt 200) OR (CLOTHYA $=140$ and AMOUNT It 8 or gt 300) OR (CLOTHYA = 150 and AMOUNT It 10 or gt 269) OR (CLOTHYA $=170$ and AMOUNT It 8 or gt 455) OR (CLOTHYA $=180$ and AMOUNT It 5 or gt 220) OR (CLOTHYA $=190$ and AMOUNT It 5 or gt 210) OR (CLOTHYA $=200$ and AMOUNT It 5 or gt 109) OR (CLOTHYA $=210$ and AMOUNT It 5 or gt 60) OR (CLOTHYA $=220$ and AMOUNT It 5 or gt 107) OR (CLOTHYA $=230$ and AMOUNT It 5 or gt 159) OR (CLOTHYA $=240$ and AMOUNT It 5 or gt 200) OR (CLOTHYA $=250$ and AMOUNT It 9 or gt 418) OR (CLOTHYA $=260$ and AMOUNT It 5 or gt 448) OR (CLOTHYA $=280$ and AMOUNT It 5 or gt 210) OR (CLOTHYA $=310$ and AMOUNT It 9 or gt 150) OR (CLOTHYA $=330$ and AMOUNT It 5 or gt 330) OR (CLOTHYA $=370$ and AMOUNT It 5 or gt 450) OR (CLOTHYA $=380$ and AMOUNT It 5 or gt 1800) then goto ERR1_AMOUNT] <br> [ELSEIF CLOTHYA and the entry in AMOUNT for this record are equal to any record data in the prechart/input then display ERR_DUP] <br> [ELSE goto TAX] $<\mathrm{D}, \mathrm{R}>\quad$ [goto C ] |
| 09 | CLOTHTXA | TAX | Did this include sales tax? | <1,2, D, R> [goto C] |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
| $\frac{\text { Description Name Month Amount }}{\text { (CLODESCA) (CLONAME) (CLOTHMOA) }}$ (CLOTHXA) |  |  |  |  |
| $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |  |  |  |
| 09 | CLOCMBA_S | C | * Enter 'C' for a combined expense. | <C> $\quad$ [goto COMBCODE] <empty> $\quad$ [goto MORE] [IF anything other than a 'C' or the enter key is entered, goto CK_C] |
| 09 | CLOCMBA | COMBCODE | [EA 23-24 ? [F1] | <1-21,77> [goto MORE] |

What other clothing is (Clothing purchase description) combined with?

- Enter all that apply, separate with commas.

Description Name Month Amount
(CLODESCA) (CLONAME) (CLOTHMOA) (CLOTHXA)

1. Coats, jackets or furs
2. Sport coats or tailored jackets
3. Sport coats or tailored jacke
4. Suits
5. Sweaters or sweater sets
6. Pants, jeans, or shorts
. Dresses
7. Skirts
8. Shirts, blouses or tops
9. Undergarments
10. Hosiery
11. Nightware or loungewear
12. Accessories
13. Swimsuits or warm-up or ski suits
14. Uniforms, for which the cost is not reimbursed
15. Costumes
16. Footwear, including athletic footware
17. Diapers
18. Layettes
19. Watches
20. Jewelry

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 1. Your household <br> 2. Someone outside your household |  |
| 09 | CLOTHMOD | MONTH | When did you purchase this service? | <REF_MONTH-CUR_MONTH> [IF Entry is not within reference period, goto ERR3_MONTH] [ELSE goto AMOUNT] |
|  |  |  | 1. January <br> 2. February <br> 3. March <br> 4. April <br> 5. May <br> 6. June <br> 7. July <br> 8. August <br> 9. September <br> 10. October <br> 11. November <br> 12. December |  |
| 09 | CLSRVCX | AMOUNT | How much did it cost? | <1-999999> [If AMOUNT It 5 or gt 249 goto ERR1_AMOUNT] <br> [ELSEIF CLOTHYD and entry in AMOUNT for this record are equal to any record data in the prechart/input then goto ERR_DUP] <br> [ELSE goto TAX] |
|  |  |  |  | <D,R> [goto C] |
| 09 | CLSRVCTX | TAX | Did this include sales tax? <br> 1. Yes <br> 2. No | <1,2,D,R> [goto C] |
| 09 | CLOCMBD_S | C | * Enter 'C' for a combined expense. | <C> $\quad$ [goto COMBCODE] <empty> $\quad$ [goto MORE] [IF anything other than a 'C' or the enter key is entered $\quad$ goto CK_C] |
| 09 | CLOCMBD | COMBCODE | [17 26 ? [F1] <br> What other clothing services is (Clothing Service Description) combined with? <br> Enter all that apply, separate with commas. | <1-5,77> [goto MORE] |



Did you rent any -

| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 1. Automobiles, trucks, vans, minivans, or SUVs <br> 2. Motor homes <br> 3. Trailer-type camper <br> 4. Other attachable-type camper <br> 5. Motorcycle, motor scooter, or moped (motorized bicycle) <br> 6. Boat, with motor <br> 7. Boat, without a motor <br> 8. Trailer other than a camper type, such as for a boat or cycle <br> 9. Private plane <br> 10. Any other vehicle <br> 95. Continue list <br> 99. None/No More Entries <br> 888. Delete the Line |  |
| 10 | ANYVACAT | ANYVACAT | Was the (description) rented solely for use on a vacation, overnight trip, or a trip of 75 miles or more one way? | $\begin{array}{ll} \hline<1> & \text { [goto RENT_MORE] } \\ <2, \mathrm{D}, \mathrm{R}> & \text { [goto AMOUNT] } \end{array}$ |


|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| :---: | :---: | :---: | :---: | :---: |
| 10 | RENTEXPX | AMOUNT | Since the first of ^REF_MONTH, not including (current month), what has been your expense for renting this vehicle? | <0> [goto CK_AMOUNT] |
|  |  |  |  | $<1-99999>$ [if entry lt 10 or gt 1200 then goto ERR1_AMOUNT] <br> [ELSE goto ANYBSNRM] |
|  |  |  |  | <D,R> [goto ANYBSNRM] |
| 10 | ANYBSNRM | ANYBSNRM | Were or will any of the rental expenses be deducted as business expenses, reimbursed, or paid by someone outside of the household? | $<1>$ [goto BSNSPCTZ] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto RENT_MORE] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 10 | BSNSPCTZ | BSNSPCTZ | What percent of the total expense will this cover? | <1-99,D,R> [goto RENT_MORE] |
|  |  |  |  | <100> [goto ERR2_BSNSPCTZ] |
| 10 | RENT_MORE | RENT_MORE | Did you rent any other (description)? | <1> [IF ROW number = 5 then goto ERR_MAX] <br> [ELSE goto RLV_ITEM] |

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ | <2,D,R> [goto RLV_ITEM] |
| 10 | LVIHAVE | LVIHAVE | Are you still leasing the (model year) (vehicle make and model)? | $<1, \mathrm{D}, \mathrm{R}>$ [goto S10INV_END] <br> $<2>$ [goto LVIENDMO] |
|  |  |  | Vehicle Number Vehicle Year Vehicle Make/Model Business <br> (LSDNUM) (MODELYR) (MKMD_SCR) (ANYBUSIN) |  |
|  |  |  | 1. Yes <br> 2. No |  |
| 10 | LVIENDMO | LVIENDMO | What month was the lease terminated? <br> Vehicle Number Vehicle Year Vehicle Make/Model Business | <ref_month - cur_month, D, R> [goto TERMFEE] |
|  |  |  |  |  |
|  |  |  | 1. January <br> 2. February <br> 3. March <br> 4. April <br> 5. May <br> 6. June <br> 7. July <br> 8. August <br> 9. September <br> 10. October <br> 11. November <br> 12. December |  |
| 10 | TERMFEE | TERMFEE | Were any fees incurred at the termination of the lease? | $<1>$ [goto TERMFEEX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto S10INV_END] |
|  |  |  | 1. Yes <br> 2. No |  |
| 10 | TERMFEEX | TERMFEEX | How much? | <1-99999> [if entry lt 25 or gt 7000 then goto ERR1_TERMFEEX] <br> [else goto S10INV_END] |
|  |  |  |  | <D,R> [goto S10INV_END] |
| 10 | LSD_ITEM | ITEM | Since the first of ^REF_MONTH, have ^YOU_ANYMEM (made any lease payments orl ) begun leasing any automobiles, trucks, vans, minivans, or SUVs not used entirely for business? | $<1>$ [goto MODELYR] <br> $<99>$ [goto S10_END] <br> $<888>$ [goto ITEM - next line of grid] |

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 1. Automobiles, trucks, vans, minivans, or SUVs 99. None/No more entries <br> 888. Delete the line | [If no more grid lines goto S10_END] |
| 10 | MODELYR | MODELYR | Ask if necessary <br> What is the model year of the vehicle? | <1900-current year + 1> [IF MODELYR gt (current year + <br> 1) goto CK_MODELYR] <br> [ELSE goto MKMD_SCR] |
|  |  |  |  | <D,R> [goto MKMD_SCR] |
|  | MKMD_SCR | MKMD_SCR | What is the make and model of this vehicle? <br> If vehicle make and model is not found, key $X$ | $<30$ characters> [goto ANYBUSIN] <br> $<\mathrm{D}, \mathrm{R}>$ [goto AUTOTK] <br> $<\mathrm{X}>$ [goto OTHMODEL] |
| 10 | OTHMODEL | OTHMODEL | - Specify other make and model | <30 characters> [goto AUTOTK] |
| 10 | AUTOTK | AUTOTK | Is this vehicle an automobile or a truck, minivan, van or SUV? |  |
|  |  |  | 1. Automobile <br> 2. Truck, van, minivan, or SUV |  |
| 10 | ANYBUSIN | ANYBUSIN | Is it used for business? | $\begin{array}{ll} \hline<1> & \text { [goto PRCBSNSZ] } \\ <2, \mathrm{D}, \mathrm{R}> & \text { [goto NUMPAY] } \end{array}$ |
|  |  |  | 1. Yes 2. No |  |
| 10 | PRCBSNSZ | PRCBSNSZ | What percentage of the mileage is counted as a business expense? | $\begin{aligned} & \hline \text { <1-99,D,R> [goto NUMPAY] } \\ & <100>\text { [goto ERR2_PRCBSNSZ] } \end{aligned}$ |
| 10 | NUMPAY | NUMPAY | What was the number of payments contracted for? |  |
| 10 | PMTMONTH | PMTMONTH | In what month was or will the first payment be made? <br> 1. January <br> 2. February <br> 3. March <br> 4. April <br> 5. May <br> 6. June <br> 7. July <br> 8. August <br> 9. September <br> 10. October <br> 11. November | <1-12,D,R> [goto PMTYEAR] |

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
| 10 | EXTRAEXP | EXTRAEXP | How much of the payment is for these extra charges? | <1-99999> [IF EXTRAEXP gt PAYEXPX goto CK_EXTRA] [ELSEIF (PAYTIME $=1$ and EXTRAEXP It 5 or gt 100) OR (PAYTIME $=2$ and EXTRAEXP It 5 or gt 200) OR (PAYTIME $=3$ and EXTRAEXP It 5 or gt 400) OR (PAYTIME $=4$ and EXTRAEXP It 5 or gt 1200) OR (PAYTIME $=5$ and EXTRAEXP It 5 or gt 2400) OR (PAYTIME $=6$ and EXTRAEXP It 5 or gt 4800) OR (PAYTIME $=7$ and EXTRAEXP It 5 or gt 3000) OR (PAYTIME $=8$ and EXTRAEXP It 5 or gt 3000) OR (PAYTIME $=\mathrm{D}$ or R and EXTRAEXP It 5 or gt 3000) then goto ERR1_EXTRAEXP] [ELSE goto ANYEMPLY] |
|  |  |  |  | <D,R> [goto ANYEMPLY] |
| 10 | ANYEMPLY | ANYEMPLY | Is any of the (\$ (amount in PAYEXPX) ) lease payment paid by an employer? <br> 1. Yes <br> 2. No | $<1>$ [goto EMPLYEXP] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto ANYTRADE] |
| 10 | EMPLYEXP | EMPLYEXP | How much? |  |
| 10 | ANYTRADE | ANYTRADE | Was a trade-in allowance received? <br> 1. Yes <br> 2. No | $<1>$ [goto TRADEEXP] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto ANYDOWN] |
| 10 | TRADEEXP | TRADEEXP | How much? | <1-999999> [IF entry It 400 or gt 26000 goto ERR1_TRADEEXP] <br> [ELSE goto ANYDOWN] <br> <D,R> [goto ANYDOWN] |
| 10 | ANYDOWN | ANYDOWN | Was a cash down payment made? <br> - Read if necessary - | $\begin{array}{ll} \hline<1> & \text { [goto DOWNEXP] } \\ <2, \mathrm{D}, \mathrm{R}> & \text { [goto ANYHAVE] } \end{array}$ |


|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| :---: | :---: | :---: | :---: | :---: |
| 10 | DOWNEXP | DOWNEXP | How much? | $\begin{aligned} & \text { <1-999999> [IF It } 262 \text { or gt } 10000 \text { then goto } \\ & \text { ERR1_DOWNEXP] } \end{aligned}$ |

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  |  | [ELSE goto ANYDNEMP] |
|  |  |  |  | <D,R> [goto ANYDNEMP] |
| 10 | ANYDNEMP | ANYDNEMP | Was any portion of the cash down payment paid by an employer? | $<1>$ [goto DNEMPEXP] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto ANYHAVE] |
|  |  |  | 1. Yes <br> 2. No |  |
| 10 | DNEMPEXP | DNEMPEXP | How much? | <1-999999> [IF It 5 or gt 2500 then goto ERR1_DNEMPEXP] <br> [ELSEIF DNEMPEXP gt DOWNEXP then goto CK_DNEMPEXP] <br> [ELSE goto ANYHAVE] |
|  |  |  |  | <D,R> [goto ANYHAVE] |
| 10 | ANYHAVE | ANYHAVE | Are you still leasing this vehicle? <br> - If the vehicle was purchased at the end of the lease, collect the new vehicle in Section 11. | $\ll 1, \mathrm{D}, \mathrm{R}>$ [goto ANYOTH] <br> $<2>$ [goto LSDENDMO] |
|  |  |  | 1. Yes <br> 2. No |  |
| 10 | LSDENDMO | LSDENDMO | In what month was the lease terminated? | <1-12,D,R> [goto LSDENDYR] |
|  |  |  | 1. January <br> 2. February <br> 3. March <br> 4. April <br> 5. May <br> 6. June <br> 7. July <br> 8. August <br> 9. September <br> 10. October <br> 11. November <br> 12. December |  |
| 10 | LSDENDYR | LSDENDYR | In what year was the lease terminated? | <1950-(current year + 1),D,R> [goto ANYFEES] |
| 10 | ANYFEES | ANYFEES | ? [F1] <br> Were any fees incurred at the termination of the lease? | $<1>$ [goto FEESEXP] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto ANYOTH] |

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 10 | FEESEXP | FEESEXP | How much? | <1-999999> [IF It 50 or gt 3000 then goto ERR1_FEESEXP] <br> [ELSE goto ANYOTH] |
|  |  |  |  | <D,R> [goto ANYOTH] |
| 10 | ANYOTH | ANYOTH | Did you lease any other (automobiles/trucks, vans, minivans, or SUVs)? |  |
|  |  |  | 1. Yes 2. No |  |
| 11 | S11_INTRO | S11_INTRO | [d 27 | <1> [IF there are vehicles on the chart with 8500.OVB_STAT ne 3 goto TBLInv.Binv.OVAHAVE] [ELSE goto BVehicle.Brow.ITEM] |
|  |  |  | ^S11_prechart |  |
|  |  |  | 1. Enter 1 to Continue |  |
| 11 | OVAHAVE | OVAHAVE | ${ }^{\wedge}$ Dodoes ${ }^{\wedge}$ YOU_YRCU still have the (Car Description)? ^S11_prechart | $<1, D, R>\quad$ [goto OVAHAVE for next appropriate vehicle on chart, if no more vehicles exit block and goto ITEM] <2> [goto BDisposed.VEHDISP] |
|  |  |  | 1. Yes <br> 2. No |  |
| 11 | VEHDISP | VEHDISP | How did you dispose of the (Car description)? | $\begin{array}{lc} \hline<1-5, \mathrm{D}, \mathrm{R}> & \text { [goto VDISPMO] } \\ <6>\quad \text { [goto DISPOTHV] } \end{array}$ |
|  |  |  | 1. Sold <br> 2. Traded in <br> 3. Given away or donated to someone outside the household, including students away at school <br> 4. Damaged beyond repair <br> 5. Stolen <br> 6. Other |  |
| 11 | DISPOTHV | DISPOTHV | - Specify: | <30 characters> [goto VDISPMO] |
| 11 | VDISPMO | VDISPMO | In what month was it (sold/traded in/given away to someone outside the CU/damaged beyond repair/stolen/disposed of)? <br> 1. January <br> 2. February <br> 3. March <br> 4. April <br> 5. May | ```<1-12,D,R> [IF not in reference period goto ERR3_VDISPMO] [ELSEIF VEHDISP \(=1\), goto SALEX] [ELSEIF VEHDISP \(=2,3,6, \mathrm{D}, \mathrm{R}\), goto``` |
|  |  |  |  | LOANSTAT] <br> [ELSEIF VEHDISP $=4$ or 5 , goto REIMBURS] |

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 6. June <br> 7. July <br> 8. August <br> 9. September <br> 10. October <br> 11. November <br> 12. December |  |
| 11 | SALEX | SALEX | How much did you sell it for? | <1-999999> [IF (VEHICYB = 100 and SALEX It 5 or gt 17400 ) or (VEHICYB $=105$ and SALEX It 5 or gt 17400) or (VEHICYB = 110 and SALEX It 5 or gt 17400) or (VEHICYB $=120$ and SALEX It 35 or gt 23000) or (VEHICYB = 130 and SALEX It 35 or gt 23000) or (VEHICYB $=140$ and SALEX It 35 or gt 23000) or (VEHICYB $=150$ and SALEX It 35 or gt 23000) or (VEHICYB = 160 and SALEX It 35 or gt 23000) or (VEHICYB $=170$ and SALEX It 35 or gt 23000) or (VEHICYB $=180$ and SALEX It 35 or gt 23000) or (VEHICYB $=190$ and SALEX It 35 or gt 23000) or (VEHICYB = 200 and SALEX It 35 or gt 23000) then goto ERR1_SALEX] [ELSE goto LOANSTAT] |
|  |  |  |  | <D,R> [goto LOANSTAT] |
| 11 | REIMBURS | REIMBURS | Were you reimbursed for the value of the (Car description)? | $<1>$ [goto REIMBURX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto EXREIMB] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 11 | REIMBURX | REIMBURX | How much did you receive? | <1-999999> [IF It 20 or gt 23742 then goto ERR1_REIMBURX] <br> [ELSE goto LOANSTAT] |
|  |  |  |  | <D,R> [goto LOANSTAT] |
| 11 | EXREIMB | EXREIMB | Do you expect to be reimbursed for the value of the (Car description)? | $<1>$ [goto EXREIMBX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto LOANSTAT] |
|  |  |  | 1. Yes <br> 2. No |  |
| 11 | EXREIMBX | EXREIMBX | How much will you receive? | <1-999999> [IF It 300 or gt 9000 then goto ERR1_EXREIMBX] <br> [ELSE goto LOANSTAT] |
|  |  |  |  | <D,R> [goto LOANSTAT] |
| 11 | LOANSTAT | LOANSTAT | Were there any outstanding loans on the (Car description) when it was (sold/traded in/given away to someone outside the CU/damaged beyond repair/stolen/disposed of)? | $<1>$ [goto FINPAYMT] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto OVAHAVE next line on grid] |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  |  | [if no more vehicles, exit block and goto ITEM] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 11 | FINPAYMT | FINPAYMT | Were any final payments made on the loan? | $<1>$ [goto FINPAYMX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto OVAHAVE next line on grid] <br>  [if no more vehicles, exit block and goto ITEM] |
|  |  |  | 1. Yes <br> 2. No |  |
| 11 | FINPAYMX | FINPAYMX | How much was the final payment? | <1-999999> [IF It 384 or gt 26500 then goto ERR1_FINPAYMX] <br> [ELSE goto OVAHAVE next line on grid] <br> [IF no more vehicles, exit block and goto ITEM] |
|  |  |  |  | <D,R> [goto OVAHAVE, next line on grid] [if no more vehicles, exit block and goto ITEM] |
| 11 | OVB_ITEM | ITEM | [E] 27 ? [F1] | $<1>$ [goto VEHICYR] <br> $<2-10>$ [goto VEHBSNS] <br> $<95>$ [goto ITEM, next screen] <br> $<99>$ [goto S11_END] <br> $<888>$ $\quad$ [goto ITEM - next line of grid] [If no more grid <br> lines goto S11_END]  |
|  |  |  |  |  |
|  |  |  | (Since the first of ^REF_MONTH, ^cu_havehas2 ${ }^{\wedge}$ YOU_YRCU purchased or acquired any vehicle that is not used entirely for business? Include those vehicles purchased for your own use or for someone outside your household. $I^{\wedge}$ CU_HaveHas1 ^YOU_YRCU purchased or acquired any other vehicles since the first of ^REF_MONTH?) |  |
|  |  |  | - IF YES - What kind of vehicle was it? |  |
|  |  |  |  |  |
|  |  |  | [1] 41 |  |
|  |  |  | (Do/Does) ^YOU_YRCU own any automobiles, trucks, minivans, vans or SUV's which were not used entirely for business? |  |
|  |  |  |  |  |
|  |  |  | (Do/Does) ^YOU_YRCU own any other types of vehicles which are not used entirely for business? |  |
|  |  |  | + IF YES- Read each item on list |  |


| Section | Tag Name | Variable Name | Question Text |  |
| :---: | :---: | :---: | :---: | :---: |

SCREEN 3-
CU_HaveHas1 ^YOU_YRCU purchased any ^other vehicles since the first of ^REF_MONTH for someone outside of your household?

- IF YES -

What kind of vehicle(s) did you purchase?

SCREEN 4
CU_HaveHas1 ^YOU_YRCU disposed of (anylany automobiles or) other vehicles since the first of ^REF_MONTH?

- IF YES -

Which kind of vehicle(s) did you dispose of?

1. Automobile, truck, van, minivan, or SUV
2. Motor home
3. Trailer-type camper
4. Other attachable-type camper
5. Motorcycle, motor scooter, or moped (motorized bicycle)
6. Boat, with motor
7. Boat, without a motor
8. Trailer other than a camper type, such as for a boat or cycle
9. Private plane
10. Any other vehicl
11. Continue list
12. None/No more entries
13. Delete the line


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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  |  | <D,R> [goto MKMDL_SC] |
|  | MKMDL_SC | MKMDL_SC | What (was/is) the make and model of this vehicle? <br> If vehicle make and model is not found, key X . | <30 characters> [goto FUELTYPE] <br> $<\mathrm{D}, \mathrm{R}>$ [goto AUTOTRK] <br> $<\mathrm{X}>$ [goto OTHMDLY] |
| 11 | OTHMDLY | OTHMDLY | - Specify: | <30 characters> [goto AUTOTRK] |
| 11 | AUTOTRK | AUTOTRK | Is this vehicle an automobile or a truck, minivan, van or SUV? <br> 1. Automobile <br> 2. Truck, van, minivan, or SUV | <1,2,D,R> [goto FUELTYPE] |
| 11 | FUELTYPE | FUELTYPE | Is it fueled by - <br> - Read each item on list. <br> 1. Gasoline? <br> 2. Diesel fuel? <br> 3. Hybrid electric power? <br> 4. Other - specify? | $<1-3, D, R>$ [goto VEHBSNS] <br> $<4>$ [goto FUELOTH] |
| 11 | FUELOTH | FUELOTH | - Specify: | <30 characters> [goto VEHBSNS] |
| 11 | VEHBSNS | VEHBSNS | (Was/ls) it used for business? <br> 1. Yes <br> 2. No | $<1>$ [goto VEHBSNZ] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto VEHNEWU] |
| 11 | VEHBSNZ | VEHBSNZ | What percentage of the mileage (waslis) counted as a business expense? | <1-99,D,R> [goto VEHNEWU] <br> $<100>$ [goto ERR2_VEHBSNZ] |
| 11 | VEHNEWU | VEHNEWU | Was it new or used when acquired? 1. New 2. Used | $<1>$ [IF coming from ITEM screen 1A, 1B, 2, or 4 <br>  goto VEHGFTC] <br>  [ELSE goto VEHPURMO] <br> $<2, \mathrm{D}, \mathrm{R}>$ $[$ [IF coming from ITEM screen 1A, 1B, 2, or 4 <br>  goto VEHGFTC] <br>  $[$ [ELSE goto VPURINDV] |
| 11 | VEHGFTC | VEHGFTC | Was this vehicle - <br> 1. Purchase for own use? <br> 2. Purchased for someone outside of your household? <br> 3. Received as a gift? | $<1,2, \mathrm{D}, \mathrm{R}>$ [ELSE goto VPURINDV] $<3>\quad$ [IF DISPOSED $=1$ goto VEHDISP] [ELSE goto ANYOTHR] |
| 11 | VPURINDV | VPURINDV | Was this vehicle purchased from a private individual? <br> 1. Yes <br> 2. No | $<1,2, \mathrm{D}, \mathrm{R}>$ [IF ITEM $=1-2$ or 5 AND VEHGFTC $=3$ AND DISPOSED ne 1, then goto ANYOTHR] <br> [ELSEIF ITEM = 1-2 or 5 AND VEHGFTC $=3$ <br> AND DISPOSED $=1$, goto VEHDISP] <br> [ELSE goto VEHPURMO] |

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
| 11 | VEHPURMO | VEHPURMO | In what month was it purchased? | <1-12,D,R> [goto VEHPURYR] |
|  |  |  | 1. January <br> 2. February <br> 3. March <br> 4. April <br> 5. May <br> 6. June <br> 7. July <br> 8. August <br> 9. September <br> 10. October <br> 11. November <br> 12. December |  |
| 11 | VEHPURYR | VEHPURYR | In what year was it purchased? | <1900 - current year> [IF the month and year (VEHPURMO and VEHPURYR) are more than one month in the future then goto CK_VEHPURYR] <br> [ELSE goto VFINANCE] |
|  |  |  |  | <D,R> [goto VFINANCE] |
| 11 | VFINANCE | VFINANCE | Was any portion of the purchase price financed? <br> 1. Yes <br> 2. No | <1> [goto VLOANST] <br> <2, D, R> [IF VEHPURMO + VEHPURYR is prior to 3 months ago AND DISPOSED = 1, goto VEHDISP] <br> [ELSIF VEHPURMO + VEHPURYR is prior to 3 months ago AND DISPOSED ne 1, goto ANYOTHR] <br> [ELSE goto TRADE] |
| 11 | VLOANST | VLOANST | On the first of ^REF_MONTH, were there remaining loans payments? | <1,D,R> [goto TRADE] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ | <2> [IF VEHPURMO + VEHPURYR is prior to 3 months ago AND DISPOSED $=1$ then goto VEHDISP] <br> [ELSEIF VEHPURMO + VEHPURYR is prior to 3 months ago AND DISPOSED ne 1 then goto ANYOTHR] [ELSE goto TRADE] |
| 11 | TRADE | TRADE | Was a trade-in allowance received? <br> 1. Yes <br> 2. No | $<1>$ [goto TRADEX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto NETPURX] |
| 11 | TRADEX | TRADEX | How much? | <0-999999> [IF It 200 or gt 19000 then goto ERR1_TRADEX] <br> [ELSE goto NETPURX] |
|  |  |  |  | <D,R> [goto NETPURX] |
| 11 | NETPURX | NETPURX | What was the amount paid for the vehicle after (trade-in allowance, I ) rebate, and discount? | <0-999999> [IF (VEHICYB = 100 and NETPURX It 500 or gt 50000 ) or (VEHICYB $=105$ and NETPURX It 500 or gt |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | - Include destination fee in the price. | 50000) or (VEHICYB = 110 and NETPURX It 500 or gt 50000) or (VEHICYB = 120 and NETPURX It 2500 or gt 69000) or (VEHICYB $=130$ and NETPURX It 751 or gt 47000) or (VEHICYB $=140$ and NETPURX It 533 or gt 12051) or (VEHICYB $=150$ and NETPURX It 420 or gt 20000) or (VEHICYB = 160 and NETPURX It 200 or gt 63000) or (VEHICYB = 170 and NETPURX It 200 or gt 63000) or (VEHICYB $=180$ and NETPURX It 240 or gt 7500) or (VEHICYB $=190$ and NETPURX It 4000 or gt 120000) or (VEHICYB $=200$ and NETPURX It 250 or gt 23700) then goto ERR1_NETPURX] [else goto SALESTAX] <br> <D,R> [IF VLOANST = 1 goto DNPAYMTX] <br> [ELSE goto ANYOTHR] |
| 11 | SALESTAX | SALESTAX | Did this include sales tax? <br> 1. Yes <br> 2. No | $<1,2, \mathrm{D}, \mathrm{R}>$ [ELSE goto ANYOTHR] |
| 11 | DNPAYMTX | DNPAYMTX | What was the amount of the cash down payment? | <0-999999> [IF (VEHICYB = 100 and DNPAYMTX gt 11500) OR (VEHICYB = 105 and DNPAYMTX gt 11500) OR (VEHICYB = 110 and DNPAYMTX gt 11500) OR (VEHICYB $=120$ and DNPAYMTX gt 15000) OR (VEHICYB = 130 and DNPAYMTX gt 15000) OR (VEHICYB = 140 and DNPAYMTX gt 15000) OR (VEHICYB $=150$ and DNPAYMTX gt 15000) OR (VEHICYB $=160$ and DNPAYMTX gt 15000) OR (VEHICYB $=170$ and DNPAYMTX gt 15000) OR (VEHICYB $=180$ and DNPAYMTX gt 15000) OR (VEHICYB = 190 and DNPAYMTX gt 15000) OR (VEHICYB $=200$ and DNPAYMTX gt 15000) then goto ERR1_DNPAYMTX] <br> [IF gt NETPURX and netpurx ne $D$ and ne $R$ goto CK_DNPAYMTX] <br> [ELSE goto VEHEQTLN] <br> <D,R> [goto VEHEQTLN] |
| 11 | VEHEQTLN | VEHEQTLN | Was the source of credit a Home Equity Loan? <br> 1. Yes <br> 2. No | <1,2,D,R> [goto PRINCIPX] |
| 11 | PRINCIPX | PRINCIPX | How much was borrowed, excluding any interest? | <1-999999> [IF (VEHICYB = 100 and PRINCIPX It 2500 or gt 50000) OR (VEHICYB = 105 and PRINCIPX It 2500 or gt 50000) OR (VEHICYB $=110$ and PRINCIPX It 2500 or gt |

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| :---: | :---: | :---: | :---: | :---: |
|  |  |  |  | 50000) OR (VEHICYB = 120 and PRINCIPX It 1472 or gt 60645) OR (VEHICYB = 130 and PRINCIPX It 1472 or gt 60645) OR (VEHICYB = 140 and PRINCIPX It 1472 or gt 60645) OR (VEHICYB $=150$ and PRINCIPX It 1472 or gt 60645) OR (VEHICYB = 160 and PRINCIPX It 1472 or gt 60645) OR (VEHICYB $=170$ and PRINCIPX It 1472 or gt 60645) OR (VEHICYB $=180$ and PRINCIPX It 1472 or gt 60645) OR (VEHICYB $=190$ and PRINCIPX It 1472 or gt 60645) OR (VEHICYB $=200$ and PRINCIPX It 1472 or gt 60645) then goto ERR1_PRINCIPX] <br> [ELSE goto VINTRATE] <br> <D,R> [goto VINTRATE] |
| 11 | VINTRATE | VINTRATE | What was the interest rate? <br> * Enter precent including decimal. |  |
| 11 | PMT1YR | PMT1YR | In what year was or will the first payment be made? | <1900-(current year +1),D,R> [goto PMT1MO] |
| 11 | PMT1MO | PMT1MO | In what month was or will the first payment be made? <br> 1. January <br> 2. February <br> 3. March <br> 4. April <br> 5. May <br> 6. June <br> 7. July <br> 8. August <br> 9. September <br> 10. October <br> 11. November <br> 12. December | <1-12,D,R> [goto VEHQPMT] |
| 11 | VEHQPMT | VEHQPMT | For how many months was the payment contract? | ```<1-999> [IF gt 144 then goto ERR1_VEHQPMT] [ELSE goto PAYMENTX] <D,R> [goto PAYMENTX]``` |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  |  | ```(VEHICYB = 150 and PAYMENTX It 77 or gt 721) OR (VEHICYB = 160 and PAYMENTX It 77 or gt 721) OR (VEHICYB \(=170\) and PAYMENTX It 77 or gt 721) OR (VEHICYB \(=180\) and PAYMENTX It 77 or gt 721) OR (VEHICYB \(=190\) and PAYMENTX It 77 or gt 721) OR (VEHICYB \(=200\) and PAYMENTX It 77 or gt 721) then goto ERR1_PAYMENTX] [ELSEIF DISPOSED = 1 goto VEHDISP] [ELSE goto ANYOTHR] <D,R> [IF DISPOSED \(=1\) goto VEHDISP] [ELSE goto ANYOTHR]``` |
| 11 | VEHDISP | VEHDISP | How did you dispose of the (Car description)? <br> 1. Sold <br> 2. Traded in <br> 3. Given away or donated to someone outside the household, including students away at school <br> 4. Damaged beyond repair <br> 5. Stolen <br> 6. Other | <1-5,D,R> [goto VDISPMO] <br> $<6>$ [goto DISPOTHV] |
| 11 | DISPOTHV | DISPOTHV | 4 Specify: | <30 characters> [goto VDISPMO] |
| 11 | VDISPMO | VDISPMO | In what month was it ^Vehdisp_fill? <br> 1. January <br> 2. February <br> 3. March <br> 4. April <br> 5. May <br> 6. June <br> 7. July <br> 8. August <br> 9. September <br> 10. October <br> 11. November <br> 12. December | <1-12,D,R> [IF VDISPMO is not within the reference period then goto ERR3_VDISPMO] <br> [ELSEIF VEHDISP = 1 goto SALEX] <br> [ELSEIF VEHDISP $=2,3,6, \mathrm{D}$ or R , goto <br> LOANSTAT] <br> [ELSEIF VEHDISP $=4$ or 5 , goto REIMBURS] |
| 11 | SALEX | SALEX | How much did you sell it for? | <1-999999> [IF (VEHICYB = 100 and SALEX It 5 or gt 17400) OR (VEHICYB $=105$ and SALEX It 5 or gt 17400) OR (VEHICYB = 110 and SALEX It 5 or gt 17400) OR (VEHICYB $=120$ and SALEX It 35 or gt 23000) OR (VEHICYB $=130$ and SALEX It 35 or gt 23000) OR (VEHICYB $=140$ and SALEX It 35 or gt 23000) OR (VEHICYB $=150$ and SALEX It 35 or gt 23000) OR (VEHICYB $=160$ and SALEX It 35 or gt 23000) OR (VEHICYB $=170$ and SALEX It 35 or gt 23000) OR |

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|  |  |  |  | (VEHICYB = 180 and SALEX It 35 or gt 23000) OR (VEHICYB = 190 and SALEX It 35 or gt 23000) OR (VEHICYB $=200$ and SALEX It 35 or gt 23000) then goto ERR1_SALEX] <br> [ELSE goto LOANSTAT] |
|  |  |  |  | <D,R> [goto LOANSTAT] |
| 11 | REIMBURS | REIMBURS | Were you reimbursed for the value of the (Car description)? <br> 1. Yes <br> 2. No | $<1>$ [goto REIMBURX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto EXREIMB] |
| 11 | REIMBURX | REIMBURX | How much did you receive? | <1-999999> [IF It 20 or gt 23742 then goto ERR1_REIMBURX] <br> [ELSE goto LOANSTAT] |
|  |  |  |  | <D,R> [goto LOANSTAT] |
| 11 | EXREIMB | EXREIMB | Do you expect to be reimbursed for the value of the (Car description)? | $\begin{array}{lc} \hline<1> & \text { [goto EXREIMBX] } \\ <2, \mathrm{D}, \mathrm{R}> & \text { [goto LOANSTAT] } \end{array}$ |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 11 | EXREIMBX | EXREIMBX | How much will you receive? | <1-999999> [IF It 300 or gt 9000 then goto ERR1_EXTREIMBX] <br> [ELSE goto LOANSTAT] |
|  |  |  |  | <D,R> [goto LOANSTAT] |
| 11 | LOANSTAT | LOANSTAT | Were there any outstanding loans on the (Car description) when it was (sold/traded in/given away to someone outside the CU/damaged beyond repair/stolen/disposed of)? | $\begin{array}{ll} \hline<1> & \text { [goto FINPAYMT] } \\ <2, \mathrm{D}, \mathrm{R}> & \text { [goto ANYOTHR] } \end{array}$ |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 11 | FINPAYMT | FINPAYMT | Were any final payments made on the loan? <br> 1. Yes <br> 2. No | $\begin{array}{lc} \hline<1> & \text { [goto FINPAYMX] } \\ <2, \mathrm{D}, \mathrm{R}> & {[\text { goto ANYOTHR] }} \end{array}$ |
| 11 | FINPAYMX | FINPAYMX | How much was the final payment? | <1-999999> [IF It 384 or gt 26500 then goto ERR1_FINPAYMX] <br> [ELSE goto ANYOTHR] |
|  |  |  |  | <D,R> [goto ANYOTHR] |
| 11 | ANYOTHR | ANYOTHR | (Did ^YOU_YRCU purchase or acquire any other ^autos?/ "^CO_DoDoes ^YOU_YRCU own any other ^autos?/ Did ^YOU_YRCU purchase any other ^autos for someone outside your household?! Did | $<1>$ [IF Row number $=25$ then goto ERR_MAX] [ELSE goto ITEM, next screen as appropriate] |



| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 16. Shock absorber replacement <br> 17. Drive shaft or rear-end work <br> 18. Video equipment or installation <br> 19. Audio equipment or installation <br> 20. Vehicle accessories or customizing <br> 21. Vehicle cleaning services or cleaning supplies <br> 22. Other vehicle services, part, or equipment <br> 95. Continue List <br> 99. None/No more entries <br> 888. Delete a line |  |
| 12 | VOPDESC | DESCRIPTION | What was the expense for? | <30 characters> [goto VOPLABOR] |
| 12 | VOPLABOR | VOPLABOR | Did this expense include labor? <br> 1. Yes <br> 2. No | <1,2,D,R> [goto MONTH] |
| 12 | VOPMOA | MONTH | In what month did you have this expense? <br> 1. January <br> 2. February <br> 3. March <br> 4. April <br> 5. May <br> 6. June <br> 7. July <br> 8. August <br> 9. September <br> 10. October <br> 11. November <br> 12. December | <REF_MONTH - CUR_MONTH> [IF MONTH not within reference period then goto ERR3_MONTH] <br> [ELSE goto AMOUNT] <br> <D,R> [goto AMOUNT] |
| 12 | VOPEXPX | AMOUNT | What was the total cost? | <1-99999> [IF (VOPSERVY eq 100 and AMOUNT It 8 or gt 89) OR (VOPSERVY eq 110 and AMOUNT It 10 or gt 1500) OR (VOPSERVY eq 120 and AMOUNT It 16 or gt 836) OR (VOPSERVY eq 130 and AMOUNT It 16 or gt 211) OR (VOPSERVY eq 140 and AMOUNT It 20 or gt 1000)OR (VOPSERVY eq 150 and AMOUNT It 5 or gt 335) OR |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  |  | (VOPSERVY eq 160 and AMOUNT It 8 or gt 690) OR (VOPSERVY eq 170 and AMOUNT It 19 or gt 1224) OR (VOPSERVY eq 180 and AMOUNT It 6 or gt 750) OR (VOPSERVY eq 190 and AMOUNT It 19 or gt 3000) OR (VOPSERVY eq 200 and AMOUNT It 9 or gt 1200) OR (VOPSERVY eq 210 and AMOUNT It 6 or gt 1100) OR (VOPSERVY eq 300 and AMOUNT It 15 or gt 1000) OR (VOPSERVY eq 310 and AMOUNT It 15 or gt 2500) OR (VOPSERVY eq 320 and AMOUNT It 15 or gt 4000) OR (VOPSERVY eq 330 and AMOUNT It 22 or gt 1000) OR (VOPSERVY eq 340 and AMOUNT It 13 or gt 1500) OR (VOPSERVY eq 345 and AMOUNT It 50 or gt 1000) OR (VOPSERVY eq 350 and AMOUNT It 12 or gt 1500) OR (VOPSERVY eq 360 and AMOUNT It 5 or gt 1700) OR (VOPSERVY eq 365 and AMOUNT It 2 or gt 100)OR (VOPSERVY eq 370 and AMOUNT It 5 or gt 1000) then goto ERR1_AMOUNT <br> [ELSEIF (VOPSERVY and the entry in AMOUNT <br> for this record are equal to any records data on the pre-chart/input then goto ERR_DUP) <br> $<\mathrm{D}, \mathrm{R}>\quad$ [goto C ] <br> [ELSE goto VOPTAX] |
| 12 | VOPTAX | VOPTAX | Did this include sales tax? | <1,2,D,R> [goto C] |
|  |  |  | Description Month Amount <br> (VOPDESC) (VOPMOA) |  |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 12 | VOPCMB_C | C | * Enter 'C' for combined expense | <C> [goto COMBCODE] <br> <empty> [goto VOPREIMB] <br> IF anything other than a 'C' or blank is entered, goto CK_C  |
|  | VOPCMB | COMBCODE | [1] 28-29 ? ${ }^{\text {P1] }}$ | <1-22,77> [goto VOPREIMB] |

## What expense was combined with the ^VOPCMB expense?

- Enter all that apply, separate with commas.

Description Month Amount
(VOPDESC) (VOPMOA) (VOPEXPX)

## 1. Oil chg/lube/filter

2. Motor tune/up

| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 3. Brake work <br> 4. Battery purch/install <br> 5. Tire purch/mounting <br> 6. Tire repair <br> 7. Front end align/wheel balancing/wheel rotate <br> 8. Steering/front end work <br> 9. Electrical system work <br> 10. Engine repair/replace <br> 11. Air conditioning work <br> 12. Engine cooling sys. work <br> 13. Exhaust system work <br> 14. Clutch or transmission wk <br> 15. Body work or painting <br> 16. Shock absorber replacement <br> 17. Drive shaft/rear end work <br> 18. Video equipment/install <br> 19. Audio equipment/install <br> 20. Accessories/customizing <br> 21. Vehicle cleaning/supplies <br> 22. Other serv./parts/equip. <br> 77. Misc combined (unable to specify/DK) |  |
| 12 | VOPREIMB | VOPREIMB | Has any of this expense been, or will any of it be, reimbursed? | $\begin{aligned} & \hline<1>\quad \text { [goto VOPRMBXA] } \\ & <2, \mathrm{D}, \mathrm{R}>\text { [goto MORE] } \end{aligned}$ |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 12 | VOPRMBXA | VOPRMBXA | How much? | ```<1-99999> [IF VOPRMBXA gt 5000, goto ERR1_VOPRMBXA] [ELSEIF(VOPRMBXA gt AMOUNT) goto CK_VOPRMBXA] [ELSE goto MORE]``` |
|  |  |  |  | <D,R> [goto MORE] |
| 12 | MOREVEOP | MORE | Did you have any other expenses for ^VOPCMB? <br> Description Month Amount | <1> [IF ROW number = 26, goto ERR_MAX] <br> [ELSE goto ITEM, next line of grid] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto ITEM, next line of grid] |
|  |  |  | (VOPDESC) (VOPMOA) (VOPEXPX) <br> 1. Yes <br> 2. No |  |
|  | S12B_INTRO | INTROB | [4. 30 | <1> [goto BTABLEB.BROW.ITEM] |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |



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| :---: | :---: | :---: | :---: | :---: |
|  |  |  | $\frac{\text { Description Month Amount }}{(\text { VREGDESC }) \quad\left(V O P M O \_C\right) ~(V O P R E G X)}$ | (ITEM $=2$ and AMOUNT It 5 or gt 120) OR <br> (ITEM $=3$ and AMOUNT It 10 or gt 423) OR <br> (ITEM $=4$ and AMOUNT It 8 or gt 442) then goto ERR1_AMOUNT] <br> [ELSEIF ITEM and the entry in AMOUNT for the record are equal to any records data on the prechart/input) then goto ERR_DUP] <br> [ELSE goto C] <br> <D,R> [goto C] |
| 12 | S12BCMB_C | C | * Enter 'C' for combined expense | <C> $\quad$ [goto COMBCODE] <empty> $\quad$ [goto MORE] IF anything other than a ' C ' or blank is entered, goto CK _C |
| 12 | S12B_CMB | COMBCODE | [4 45 <br> What was combined with the ^S12B_DESC expense? <br> Enter all that apply, separate with commas <br> 1. Driver's license <br> 2. Vehicle inspection <br> 3. State Vehicle registration <br> 4. Local Vehicle registration | <1-4> [goto MORE] |
| 12 | MOREREG | MORE | Did you have any other ^S12B_DESC expenses? <br> 1. Yes <br> 2. No | <1> [IF ROW number = 11, goto ERR_MAX] <br> [ELSE goto ITEM, next line of grid] <br> $<2, D, R>$ [goto ITEM, next line of grid] |
| 12 | VOPGASX | VOPGASX | Since the first of ^REF_MONTH, what has been your household's AVERAGE MONTHLY expense for gasoline and any other fuels (including gasohol) for all vehicles? | <0,R> [goto VOPOIL] <br> $<1-9999>$ [IF VOPGASX gt 400, goto ERR1_VOPGASX] <br>  [ELSE goto VOPDIES] <br> $<$ <D> [goto VOPDIES] |
| 12 | VOPDIES | VOPDIES | Was any of this expense for the purchase of diesel fuel? | $<1>$ [goto VOPDIESX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto VOPBSNS] |

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|  |  |  | 2. No |  |
| 12 | VOPDIESX | VOPDIESX | How much? | <1-9999> [IF (VOPDIESX It 5 or gt 800) goto ERR1_VOPDIESX] <br> [ELSEIF (VOPDIESX gt VOPGASX) goto CK_VOPDIESX] <br> [ELSE goto VOPBSNS] |
|  |  |  |  | <D,R> [goto VOPBSNS] |
| 12 | VOPBSNS | VOPBSNS | Was any of the AVERAGE MONTHLY cost counted as a business expense? | $<1>$ [goto VOPBSPER] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto VOPOIL] |
|  |  |  | $\begin{aligned} & \text { 1. Ys } \\ & \text { 2. No } \end{aligned}$ |  |
| 12 | VOPBSPER | VOPBSPER | What percentage of the AVERAGE MONTHLY COST was counted as a business expense? | <1-99,D,R> [goto VOPOIL] <br> $<100>$ [goto ERR2_VOPBSPER] |
| 12 | VOPOIL | VOPOIL | Since the first of ^REF_MONTH, have ^YOU_ANYMEM purchased any oil for operating vehicles? | $<1>$  <br> $<2, \mathrm{D}, \mathrm{R}>$  <br>  [goto VOPOILX] <br>  $[$ IF INTNMBR $=1$ goto S12C_END] <br>  $[$ ELSE goto VOPFLUID] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 12 | VOPOILX | VOPOILX | What was the total cost? | $<1-9999>$ [ELSE goto VOPOILNT] 5 goto ERR1_VOPOILX] |
|  |  |  |  | <D,R> [goto VOPOILNT] |
| 12 | VOPOILNT | VOPOILNT | Was any of this purchased this month? <br> 1. Yes <br> 2. No | $<1>$ [goto VOPOILNX] <br> $<2, \mathrm{D}, \mathrm{R}>$ $[$ If INTNMBR $=1$ goto S12C_END] <br>  $[$ ELSE goto VOPFLUID] |
| 12 | VOPOILNX | VOPOILNX | How much was spent this month? | <1-9999> [IF VOPOILNX It 5 or gt 44 goto ERR1_VOPOILNX] <br> [ELSEIF (VOPOILNX gt VOPOILX) goto CK_VOPOILNX] <br> [ELSEIF INTNMBR = 1 goto S12C_END] [ELSE goto VOPFLUID] |
|  |  |  |  | $\begin{array}{cc} <\mathrm{D}, \mathrm{R}> & {[\text { IF INTNMBR }=1 \text { goto S12C_END] }} \\ {[\text { ELSE goto VOPFLUID] }} \\ \hline \end{array}$ |
| 12 | VOPFLUID | VOPFLUID | Since the first of ^REF_MONTH, not including this month, have ^YOU_ANYMEM purchased any antifreeze, brake fluid, transmission fluid, or additives, except if purchased with a tune-up? | $\begin{array}{lc} \hline<1> & \text { [goto VOPFLUDX] } \\ <2, \mathrm{D}, \mathrm{R}> & \text { [goto VOPPARK] } \\ \hline \end{array}$ |

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|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 12 | VOPFLUDX | VOPFLUDX | What was the total cost of these purchases? | <1-9999> [IF VOPFLUDX It 5 or gt 50 goto ERR1_VOPFLUDX] <br> [ELSE goto VOPPARK] |
|  |  |  |  | <D,R> [goto VOPPARK] |
| 12 | VOPPARK | VOPPARK | Since the first of ^REF_MONTH, have ^YOU_ANYMEM had expenses for - <br> Parking, such as parking meters, garage rental or parking lot fees? Do not include expenses that are part of your property ownership or rental costs, a business expense or expenses that will be totally reimbursed. | $\begin{array}{ll} \hline<1> & \text { [goto VOPPARKX] } \\ <2, \mathrm{D}, \mathrm{R}> & \text { [goto VOPTOLL] } \end{array}$ |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 12 | VOPPARKX | VOPPARKX | How much was paid, not including any payments made this month? | <1-99999> [IF VOPPARKX gt 390, goto ERR1_VOPPARKX] <br> [ELSE goto VOPTOLL] |
|  |  |  |  | <D,R> [goto VOPTOLL] |
| 12 | VOPTOLL | VOPTOLL | Since the first of ^REF_MONTH, have ^YOU_ANYMEM had expenses for - <br> Local tolls or electronic toll passes? <br> Do not include tolls incurred on a trip. | $<1>$ [goto VOPTOLLX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto VOPDOCK] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 12 | VOPTOLLX | VOPTOLLX | How much was paid, not including any payments made this month? | <1-99999> [IF VOPTOLLX gt 35, goto ERR1_VOPTOLLX] [ELSE goto VOPDOCK] |
|  |  |  |  | <D,R> [goto VOPDOCK] |
| 12 | VOPDOCK | VOPDOCK | Since the first of $\wedge$ REF_MONTH, have ^YOU_ANYMEM had expenses for - <br> Docking and landing fees for boats and planes? | $<1>$ [goto VOPDOCKX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto VOPPOLCY] |

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|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 12 | VOPDOCKX | VOPDOCKX | How much was paid, not including any payments made this month? | <1-9999> [IF VOPDOCKX gt 1752 goto ERR1_VOPDOCKX] <br> [ELSE goto VOPPOLCY] |
|  |  |  |  | <D,R> [goto VOPPOLCY] |
| 12 | VOPPOLCY | VOPPOLCY | Since the first of ^REF_MONTH, not including (current month), have ^YOU_ANYMEM had any expenses for auto repair service policies such as extended warranties? Do not include service policies for vehicles used entirely for business. | $<1>$ [goto VOPPLCYX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto VOPAUTO] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 12 | VOPPLCYX | VOPPLCYX | How much? | <1-9999> [IF VOPPLCYX It 5 or gt 1800 goto ERR1_VOPPLCYX] <br> [ELSE goto VOPAUTO] |
|  |  |  |  | <D,R> [goto VOPAUTO] |
| 12 | VOPAUTO | VOPAUTO | Since the first of ^REF_MONTH, not including (current month), have ^YOU_ANYMEM had any expenses for automobile service clubs, such as AAA? | $\begin{array}{lc} \hline<1> & \text { [goto VOPCLUBX] } \\ <2, \mathrm{D}, \mathrm{R}> & \text { [goto VOPTOW] } \end{array}$ |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 12 | VOPCLUBX | VOPCLUBX | How much? | <1-9999> [IF VOPCLUBX It 6 or gt 155 goto ERR1_VOPCLUBX] <br> [ELSE goto VOPTOW] |
|  |  |  |  | <D,R> [goto VOPTOW] |
| 12 | VOPTOW | VOPTOW | Since the first of ${ }^{\wedge}$ REF_MONTH, have ${ }^{\wedge}$ YOU_ANYMEM had expenses for - | $<1>$ [goto VOPTOWX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto TANKGAS] |

Towing charges, not already reported?

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|  |  |  | 2. No |  |
| 12 | VOPTOWX | VOPTOWX | How much was paid, not including any payments made this month? | $<1-9999>$ [ELS VOPTOWX gt 315 goto ERR1_VOPTOWX] [ELANKGAS] |
|  |  |  |  | <D,R> [goto TANKGAS] |
| 12 | TANKGAS | TANKGAS | Since the first of ^REF_MONTH, not including (current month) have ^YOU_ANYMEM had any expenses for bottled or tank gas for recreational vehicles, including vans, campers, and boats? | $<1>$ [goto TANKGASX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto S12C_END] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 12 | TANKGASX | TANKGASX | How much? | <1-9999> [IF TANKGASX It 5 or gt 200 goto ERR1_TANKGASX] <br> [ELSE goto S12C_END] |
|  |  |  |  | <D,R> [goto S12C_END] |
|  |  | S13A_INTRO | $\text { Wh } 31$ <br> Now I am going to ask about your non-health insurance policies. (Include policies paid by your household for someone outside your household.) <br> Policy\|Insurance | |Insurance|Paid|Payroll |Payment|Paid |Paid Number|Description|Type| Company | By |Deduction|Period |Total|Month | $<1>$ [IF there are any active Policies listed on the inventory chart (8500.INSTAT ne 3) goto BSect13A Block] [ELSE goto S13A_END] |
|  |  |  | 1. Enter 1 to Continue |  |
| 13 | PLCYSTIL | PLCYSTIL | Do ^YOU_ANYMEM still have or make payments for the (long term care/life or disabilitylauto/homeowner's/tenants'/other type of non-health) insurance policy from (Insurance Company)? <br> Policy\|Insurance | |Insurance|Paid|Payroll |Payment|Paid |Paid <br> Number\|Description|Type| Company | By |Deduction|Period |Total|Month | $<1,2, \mathrm{D}, \mathrm{R}>$ [ELSE 8500.PREMPAID $=3$ or 4 goto S13A_END] $[$ INSEX3A] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 13 | INSEX3A | INSEX3A | Since the first of ^REF_MONTH have you had any expenses for this policy? <br> Policy\|Insurance | |Insurance|Paid|Payroll |Payment|Paid |Paid <br> Number\|Description|Type| Company | By |Deduction|Period |Total|Month | $<1>$ [goto INSEX3AX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto S13A_END] |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 13 | INSEX3AX | INSEX3AX | How much was paid? <br> Policy\|Insurance | |Insurance|Paid|Payroll |Payment|Paid |Paid Number|Description|Type| Company | By |Deduction|Period |Total|Month | <1-99999> [IF (8500.POLICYYB = 110 and INSEX3AX gt 628) OR (8500.POLICYYB = 100 and INSEX3AX gt 628) OR (8500.POLICYYB = 200 and INSEX3AX gt 1050) OR (8500.POLICYYB $=300$ and INSEX3AX gt 1000) OR (8500.POLICYYB $=400$ and INSEX3AX gt 300) OR (8500.POLICYYB $=500$ and INSEX3AX gt 825) then goto ERR1_INSEX3AX] <br> [ELSE goto INSEXXA] <br> <D,R> [goto S13A_END] |
| 13 | INSEXXA | INSEXXA | How much was paid this month? <br> Policy\|Insurance | |Insurance|Paid|Payroll |Payment|Paid |Paid <br> Number\|Description|Type| Company | By |Deduction|Period |Total|Month | <0-99999> [IF (8500.POLICYYB = 110 and INSEXXA gt 300) OR (8500.POLICYYB = 100 and INSEXXA gt 300) OR (8500.POLICYYB = 200 and INSEXXA gt 670) OR (8500.POLICYYB $=300$ and INSEXXA gt 688) OR (8500.POLICYYB $=400$ and INSEXXA gt 186) OR (8500.POLICYYB $=500$ and INSEXXA gt 600) then goto ERR1_INSEXXA] <br> [ELSEIF INSEXXA gt INSEX3AX then goto CK_INSEXXA] <br> [ELSE goto S13A_END] <br> <D,R> [goto S13A END] |
| 13 | INB_ITEM | ITEM | [县 31 ? [F1] <br> (Do ^YOU_ANYMEM have any or pay for any -/Since the first of ^REF_MONTH have ^YOU_ANYMEM purchased o <br> - Read each item on list <br> 1. Long term care insurance? <br> 2. Life insurance or other policies which provide benefits in case of death or disability? <br> 3. Homeowners' insurance which protects your home, furniture personal effects or other property against fire, flood, theft, loss or damage? <br> 4. Renters' insurance which protects your home, furniture, personal belongings or other property against fire, flood, theft, loss or damage? <br> 5. Automobile or other vehicle insurance? <br> 6. Other types of insurance, such as those listed on page 31? | $<1-6>$ [goto INSCOMP] <br> $<99>$ [goto S13B_END] <br> $<888>$ [goto ITEM - next line of grid] <br>  [If no more grid lines, goto S13B_END] |

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|  |  |  | 99. None/No more entries 888. Delete a line |  |
| 13 | INSCOMP | INSCOMP | What is the name of the insurance company for your (long term carellife or disability/homeowners'/tenants'/vehicle/other type of insurance) policy? <br> Enter name of insurance company, not the insurance agent. | <30 characters> [goto INSDESC] |
| 13 | INSDESC | INSDESC | Briefly describe the policy. | $<30$ characters> [ELF ITEM $=3$, goto INSPROP] [ELSE goto PREMPAID] |
|  | INSPROP | INSPROP | Which property (ies) does this policy cover? <br> Enter number of each property covered, separate with commas. | <1-20> [IF any entry is higher than the number of properties or a blank precode, goto CK_INSPROP] [ELSE goto PREMPAID] |
|  |  |  | 1. PROPDESC[1] <br> 2. PROPDESC[2] <br> 3. PROPDESC[3] <br> 4. PROPDESC[4] <br> 5. PROPDESC[5] <br> 6. PROPDESC[6] <br> 7. PROPDESC[7] <br> 8. PROPDESC[8] <br> 9. PROPDESC[9] <br> 10. PROPDESC[10] <br> 11. PROPDESC[11] <br> 12. PROPDESC[12] <br> 13. PROPDESC[13 <br> 14. PROPDESC[14] <br> 15. PROPDESC[15] <br> 16. PROPDESC[16] <br> 17. PROPDESC[17] <br> 18. PROPDESC[18] <br> 19. PROPDESC[19] <br> 20. PROPDESC[20] <br> 99. Property not owned or rented by the household | <99,D,R> [goto PREMPAID] |
| 13 | PREMPAID | PREMPAID | Are the policy premiums paid - | $\substack{<1,2, \mathrm{D}, \mathrm{R}>\\ <3,4>}$ [goto PAYDEDPR] <br> [goto C]  |
|  |  |  | 1. Entirely by ^YOU_YRCU? <br> 2. Partially by $\wedge$ YOU_YRCU and partially by someone outside your household? <br> 3. Entirely by an employer or union? <br> 4. Entirely by another group or persons outside your household? |  |
| 13 | PAYDEDPR | PAYDEDPR | Are any premiums paid through payroll deductions? | <1,2,D,R> [goto INSEXPBX] |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 13 | INSEXPBX | INSEXPBX | Since the first of ^REF_MONTH, what was Your Your CU's total expense for this insurance policy? <br> Enter the actual amount the household paid. Do not include any expenses paid for the household by others. | $<1-99999>$ $[$ If (ITEM $=1$ and INSNEXXB gt 750) OR <br> (ITEM $=2$ and INSEXPBX gt 750) OR  <br>  (ITEM $=3$ and INSEXPBX gt 1000) OR <br>  (ITEM $=4$ and INSEXPBX gt 340) OR <br>  (ITEM $=5$ and INSEXPBX gt 1100) OR <br> (ITEM $=6$ and INSEXPBX gt 936)  <br> then goto ERR1_INSEXPBX]  <br> [ELSE goto INSNEXXB]  |
|  |  |  |  | <0, D,R> [goto C] |
| 13 | INSNEXXB | INSNEXXB | How much was paid this month? | <1-99999> [If (ITEM = 1 and INSNEXXB gt 300) OR (ITEM $=2$ and INSNEXXB gt 300) OR (ITEM $=3$ and INSNEXXB $=1-8$ or gt 677) OR (ITEM $=4$ and INSNEXXB $=1-5$ or gt 267) OR (ITEM = 5 and INSNEXXB = 1-17 or gt 663) OR (ITEM = 6 and INSNEXXB = 1-5 or gt 799) then goto ERR1_INSNEXXB] <br> [ELSEIF INSNEXXB gt INSEXPBX then goto CK_INSNEXXB] <br> [else goto C] |
|  |  |  |  | <0, D, R > [goto C] |
| 13 | S13_S | C | - Enter "C" for a combined expense | <C> [goto COMBCODE] <Empty $\quad$ [goto MORE] [IF anything other than a 'C' or the enter key is entered, then goto CK_C] |
| 13 | S13CMB | COMBCODE | [2] 31 ? [F1] <br> What other type of policy is the ${ }^{\wedge}$ COMBCODE_FILL combined with? | $<1-6,77>$ [ELSE goto MORE] 3 is selected, goto COMBPROP] |

- Enter all that apply, separate with commas.

1. Long term care insurance
2. Life insurance or other policies which provide benefits in case of death or disability
3. Homeowners' insurance which protects your home, furniture, personal effects or other property against fire, flood,
heft, loss or damage
4. Tenants' insurance which protects your home, furniture, personal effects or other property against fire, flood, theft,
loss or damage
5. Automobile or other vehicle insurance

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|  |  |  | 6. Other types of insurance, such as those listed on page 46 <br> 77. Misc. combined (unable to specify/DK) |  |
|  | S13CMBPROP | COMBPROP | Which property (ies) did this policy cover? <br> Enter number of each property covered, separate with commas. | <1-20> [IF any entry is higher than the number of properties or a blank precode, goto CK_COMBPROP] [ELSE goto MROE] |
|  |  |  | 1. PROPDESC[1] <br> 2. PROPDESC[2] <br> 3. PROPDESC[3] <br> 4. PROPDESC[4] <br> 5. PROPDESC[5] <br> 6. PROPDESC[6] <br> 7. PROPDESC[7] <br> 8. PROPDESC[8] <br> 9. PROPDESC[9] <br> 10. PROPDESC[10] <br> 11. PROPDESC[11] <br> 12. PROPDESC[12] <br> 13. PROPDESC[13 <br> 14. PROPDESC[14] <br> 15. PROPDESC[15] <br> 16. PROPDESC[16] <br> 17. PROPDESC[17] <br> 18. PROPDESC[18] <br> 19. PROPDESC[19] <br> 20. PROPDESC[20] <br> 99. Property not owned or rented by the household | <99,D,R> [goto MORE] |
|  | INSMORE | MORE | (Do ^You_Anymem have any or make payments for any other ^inbdescription policy?/ Did ^you_Anymem purchase or begin paying for any other ^inbdescritpion policy?) | $<1>$ [IF Row number $=100$ then goto ERR_MAX] <br> [ELSE goto ITEM, next row of the grid]  |
|  |  |  | 1. Yes <br> 2. No | <2,D,R> [goto ITEM, next row of the grid] |
|  |  | Form_Pane_Layouts |  |  |
| 14 | S14A_INTRO | S14A_INTRO | $\text { di } 32$ <br> Now I am going to ask about hospitalization and health Insurance. <br> Policy\|Insurance | |Insurance|Payroll |Time |Paid |Paid |Paid <br> \# \|Description|Type| Company |Deduction|Period|Total|Month|Non-CU | <1> [IF there are any records on the SCIF with 8500. IHB_STAT=1 goto BSect14ARow block] [ELSE goto S14A_END] |
|  |  |  | 1. Enter 1 to Continue |  |

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| 14 | HHISTILL | HHISTILL | (Do/Does) still ^HHISTILL? <br> $\begin{aligned} & \text { Policy\|Insurance \| \|Insurance\|Payroll\| \|Time \|Paid \|Paid \|Paid } \\ & \text { \# \|Description\|Type\| Company \|Deduction\|Period\|Total\|Month\|Non-CU }\end{aligned}$ | $\begin{gathered} \text { <1,2,D,R> [IF 8500.HHIPRMPD }=3,4 \text { goto S14A_END] } \\ \text { [ELSE goto HHIANYPD] } \end{gathered}$ |
|  |  |  | 1. Yes <br> 2. No |  |
| 14 | HHIANYPD | HHIANYPD | Since the first of ^REF_MONTH were any payments made on this policy by ^YOU_ANYMEM? ^Hhianypd | $<1>$ [goto HHIPDAMT] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto S14A_END] |
|  |  |  | 1. Yes 2. No |  |
| 14 | HHIPDAMT | HHIPDAMT | How much was paid? $\begin{aligned} & \text { Policy\|Insurance \| \|Insurance\|Payroll\|Time \|Paid \|Paid \|Paid } \\ & \# \quad \mid \text { \|Description\|Type\| Company \|Deduction\|Period\|Total\|Month\|Non-CU } \\ & \hline \end{aligned}$ | <1-99999> [IF (8500.HHICODE $=1$ and HHIPDAMT It 20 or gt 1700) OR (8500.HHICODE $=2$ and HHIPDAMT It 15 or gt 1882) OR (8500. HHICODE $=3$ and HHIPDAMT It 25 or gt 1341) OR (8500. HHICODE $=4$ and HHIPDAMT It 6 or gt 1080) then goto ERR1_HHIPDAMT] <br> [ELSE goto HHICMXXA] |
|  |  |  |  | <D,R> [goto S14A_END] |
| 14 | HHICMXXA | HHICMXXA | How much was paid this month? <br> Policy\|Insurance | |Insurance|Payroll |Time |Paid |Paid |Paid \# |Description|Type| Company |Deduction|Period|Total|Month|Non-CU | <0-99999> [IF (8500.HHICODE $=1$ and HHICMXXA It 5 or gt 486) OR (8500. HHICODE $=2$ and HHICMXXA It 5 or gt 600) OR (8500.HHICODE $=3$ and HHICMXXA It 10 or gt 440) OR (8500. $\mathrm{HHICODE}=4$ and HHICMXXA It 5 or gt 327) then goto ERR1_HHICMXXA] <br> [ELSEIF (HHIPDAMT It HHIPLO) OR (HHIPDAMT gt HHIPHI) then goto HHIPDCHG] <br> [ELSE goto S14A_END] |
|  |  |  |  | <D,R> [goto S14A_END] |
| 14 | HHIPDCHG | HHIPDCHG | Have there been any changes to the terms of this policy such as premium amount or payment period? <br> 1. Yes <br> 2. No | $<1>$ [goto HHICHGSP] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto S14A_END] |
| 14 | HHICHGSP | HHICHGSP | What were the changes? Specify: | <30 characters> [goto S14A_END] |
| 14 | IHB_ITEM | ITEM | [6] 32 ? [F1] <br> (Do ^YOU_ANYMEM have any hospitalization or health insurance plans or belong to a plan that pays all or | <1> [goto HINSCMP] <br> $<99>$ [goto S14B_END] |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | part of your medical expenses? Include policies paid for someone outside your householdand please consider any special purpose plans you may have, such as dental, vision, or prescription drug insurance. / Since the first of ^REF_MONTH, have ^YOU_ANYMEM purchased any ^Tsec14bltems health or hospitalization insurance? Include any policies paid for someone outside your household.) <br> Do not report Medicare Prescription Drug plans (Medicare Part D) here. Medicare Prescription Drug plans are collected in Section 14C in Interviews 2 through 5. <br> Read item on list. <br> 1. Hospitalization or health insurance plans <br> 99. None/No More Entries <br> 888. Delete the Line | <888> [goto ITEM - next line of grid] [IF no more grid lines goto S14B_END] |
| 14 | HINSCMP | HINSCMP | What is the name of the insurance company for this health insurance policy? <br> Enter name of insurance company, not the insurance agent | <30 characters> [goto HHIBCBS] |
| 14 | HHIBCBS | HHIBCBS | Do not read to respondent. <br> Is the insurance company Blue Cross/Blue Shield? <br> 1. Yes <br> 2. No | <1,2,D,R> [goto HHICOVQ] |
| 14 | HHICOVQ | HHICOVQ | How many household members are/were covered by this policy? | ```<0-30> [IF HHICOVQ gt number of active members of the persons roster goto CK_HHICOVQ] [ELSE goto HHICODE] <D,R> [goto HHICODE]``` |
| 14 | HHICODE | HHICODE | [12 32 [F1] <br> What type of insurance plan is it? <br> 1. Health Maintenance Organization <br> 2. Fee for Service Plan <br> 3. Commercial Medicare Supplement <br> 4. Other special purpose plan | $<1>$ [goto HHIPOS] <br> $<2>$ [goto HHIFEET] <br> $<3, D, R>$ [goto HHIGROUP] <br> $<4>$ [goto HHISPECT] |
| 14 | HHIPOS | HHIPOS | Under normal circumstances, if you go to a doctor who is not part of your plan without a referral, will your insurance pay for the cost? | <1,2,D,R> [goto HHIGROUP] |

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 2. No |  |
| 14 | HHIFEET | HHIFEET | [⿴囗 32 ? [F1] |  |

1. Traditional Fee for Service Plan?

2. Individually obtained
.

|  |  |  | 1. Individually obtained <br> 2. Group through place of employment <br> 3. Group through other organization |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
| 14 | HHIPRMPD | HHIPRMPD | Are the policy premiums paid- | $\begin{aligned} & <1,2, \mathrm{D}, \mathrm{R}> \\ & <3,4> \end{aligned}$ | [goto HHIPRDED] [goto HHIMORE] |


|  |  |
| :--- | :--- |
|  |  |
|  | 1. Entirely by ^YOU_YRCU? |
|  | 2. Partially by ^YOU_YRCU? |
|  |  |
|  | 3. Entirely by an employer or union? |
|  |  |
| 14 | 4HIPRDED |

## 1. Yes

| 2. No |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: |
| 14 | HHIRPMXB | HHIRPMXB | What is your part of the regular health insurance payment ^HHIRPMXB? | <1-99999> [IF (HHICODE $=1$ and HHIRPMXB It 5 or gt |

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  |  | ```(HHICODE \(=3\) and HHIRPMXB It 5 or gt 1507) OR (HHICODE \(=4\) and HHIRPMXB It 5 or gt 1200) then goto ERR1_HHIRPMXB] [ELSE goto HHIRPMPD] <D,R> [goto HHIRPMPD]``` |
| 14 | HHIRPMPD | HHIRPMPD | What period of time is covered by the regular payment? | $\begin{array}{lc} <1-6, \mathrm{D}, \mathrm{R}> & \text { [goto HHICPMTB] } \\ <7> & \text { [goto PTIMEOTH] } \end{array}$ |
|  |  |  | 1. Week <br> 2. 2 weeks <br> 3. Month <br> 4. Quarter <br> 5. 6 months <br> 6. Year <br> 7. Other - Specify |  |
| 14 | PTIMEOTH | PTIMEOTH | - Specify: | <30 characters> [goto HHICPMTB] |
| 14 | HHICPMTB | HHICPMTB | Since the first of ^REF_MONTH were any payments made on this policy? | $<1>$ [goto HHIRPMTB] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto HHIMORE] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 14 | HHIRPMTB | HHIRPMTB | Was each payment in the amount of ^HHIRPMTB? | $\begin{array}{lc} \hline<1> & \text { [goto HHIQPMTB] } \\ <2, \mathrm{D}, \mathrm{R}> & \text { [goto HHIIRGXB] } \end{array}$ |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 14 | HHIQPMTB | HHIQPMTB | How many payments were made? | <1-15, D, R> [goto HHICMXXB] |
| 14 | HHIIRGXB | HHIIRGXB | What was the total expense paid for this policy since ^REF_MONTH? | ```<1-99999> [IF HHIIRGXB It 15 or gt 1659 goto ERR1_HHIIRGXB] [ELSE goto HHICMXXB] <D,R> [goto HHICMXXB]``` |
| 14 | HHICMXXB | HHICMXXB | How much was paid this month? | <0-99999> [IF (HHICODE = 1 and HHICMXXB It 6 or gt 488) OR (HHICODE $=2$ and HHICMXXB It 5 or gt 597) OR (HHICODE $=3$ and HHICMXXB It 8 or gt 525) OR (HHICODE $=4$ and HHICMXXB It 5 or gt 316) then goto ERR1_HHICMXXB)] <br> [ELSE goto HHIMORE] |

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\begin{tabular}{|c|c|c|c|c|}
\hline Section \& Tag Name \& Variable Name \& Question Text \& Skip Instructions \\
\hline \& \& \& \& <D,R> [goto HHIMORE] \\
\hline \multirow[t]{2}{*}{14} \& \multirow[t]{2}{*}{HHIMORE} \& \multirow[t]{2}{*}{HHIMORE} \& Did you have any other hospitalization or health insurance plans? \& \[
\begin{gathered}
<1>\text { [IF ROW number = 12, goto ERR_MAX] } \\
\text { [ELSE goto ITEM, next line of grid] }
\end{gathered}
\] \\
\hline \& \& \& \begin{tabular}{l}
1. Yes \\
2. No
\end{tabular} \& <2,D,R> [goto ITEM, next line of grid] \\
\hline 14 \& CHGHHMCR \& CHGHHMCR \& Last time you said that (HHMCROV from last quarter) (CU member was/CU members were) enrolled in Medicare. Has the number of household members enrolled in Medicare changed? \& ```
<1> [goto HHMCRCOV]
<2,D,R> [IF 8500.HHPARTD = 1 goto BUPDATEDP block]
[ELSE goto RETPARTD]
``` \\
\hline \& \& \& \begin{tabular}{l}
1. Yes \\
2. No
\end{tabular} \& \\
\hline 14 \& HHMCRENR \& HHMCRENR \& Are ^YOU_ANYMEM presently enrolled in Medicare? Medicare is the Federal Health Insurance Plan. \& \begin{tabular}{ll}
\(<1>\) \& [goto HHMCRCOV] \\
\(<2, \mathrm{D}, \mathrm{R}>\) \& {\([\) [IF 8500.MDCDENR = 1 goto CHGMDCDE] \(]\)} \\
\& {\([\) ELSE goto MDCDENR] }
\end{tabular} \\
\hline \& \& \& 1. Yes
2. No \& \\
\hline 14 \& HHMCRCOV \& HHMCRCOV \& \begin{tabular}{l}
How many members of your household are covered by Medicare? \\
If this is a single person household, enter 1 without asking the question.
\end{tabular} \& \begin{tabular}{l}
<0-30> [IF HHMCRCOV gt number of CU members, goto HHMCRCOV_CK) \\
[ELSEIF INTNMBR \(=2\) OR new CU, goto \\
HHPARTD] \\
[ELSEIF INTNMBR \(=3-5\) and not a new CU AND 8500.HHPARTD \(=1\), goto BUPDATEDP block] [ELSE goto RETPARTD]
\end{tabular} \\
\hline 14 \& STILDRUG \& STILDRUG \& \begin{tabular}{l}
Is ^NAME still enrolled in a Medicare Prescription Drug plan? \\
- Enter 'YES' if the member changed to a different Medicare Prescription Drug plan. \\
1. Yes \\
2. No
\end{tabular} \& \begin{tabular}{l}
<1> [goto PREMCHG] \\
<2,D,R> [goto next member on 14C_UPDATE] \\
[IF no more members AND there exist values of \\
MEMBNO that do not match any value of \\
8500.PRTDMBNO, goto RETPARTD; \\
[ELSEIF 8500.MDCDENR ne 1, goto MDCDENR] \\
[ELSE goto CHGMDCDE]
\end{tabular} \\
\hline 14 \& PREMCHG \& PREMCHG \& Is ^NAME's premium still (the same/\$(DRGPREMX) )?

1. Yes
2. No \& <1,D,R> [goto STILDRUG for next member] [IF no more members AND there exist values of MEMBNO that do not match any value of 8500.PRTDMBNO, goto RETPARTD] [ELSEIF 8500.MDCDENR ne 1, goto MDCDENR] [ELSE goto CHGMDCDE] <br>
\hline
\end{tabular}

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  |  | <2> [goto PREMCHGX] |
| 14 | PREMCHGX | PREMCHGX | What is ^NAME 's current premium amount for the Medicare Prescription Drug Plan? | <0-999,D,R> [IF PREMCHGX It 20 or gt 100 goto ERR1_PREMCHGX] <br> [ELSE goto STILDRUG for next member] [IF no more members AND there exist values of MEMBNO that do not match any value of 8500.PRTDMBNO, goto RETPARTD] [ELSEIF 8500.MDCDENR ne 1, goto <br> [ELSE goto CHGMDCDE] |
| 14 | RETPARTD | RETPARTD | Are ^YOU_ANYMEM presently enrolled in a Medicare Prescription Drug plan since the first of $\wedge$ REF_MONTH? <br> The Medicare Prescription Drug plan is also known as Medicare Part D, which is the plan that began enrollment in November 2005. | $<1>$ [goto DRUGPLAN] <br> $<2, \mathrm{D}, \mathrm{R}>$ $[\mathrm{IF}$ 8500.MDCDENR = 1, goto CHGMDCDE] <br>  $[E L S E I F ~ 8500 . M D C D E N R ~ n e ~ 1, ~ g o t o ~ M D C D E N R] ~$ |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 14 | HHPARTD | HHPARTD | Are ^YOU_ANYMEM presently enrolled in a Medicare Prescription Drug plan? <br> The Medicare Prescription Drug plan is also known as Medicare Part D, which is the plan that began enrollment in November 2005. | $<1>$ [goto DRUGPLAN] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto MDCDENR] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
|  | DRUGPLAN | DRUGPLAN | Who ^ENROLLED in a Medicare Prescription Drug plan? <br> - Enter line numbers for all that apply, separate with commas. <br> - If this is a single person household, enter \&Idquo;1\” without asking the question | <1-30> [goto BNEWDP block] <br> <D,R> [goto MDCDENR] |
| 14 | ENROLLMO | ENROLLMO | In what month and year did ^NAMEYOU enroll in the prescription drug plan? Enter month of enrollment | <1-12,D,R> [goto ENROLLYR] |
| 14 | ENROLLYR | ENROLLYR | - Enter year of enrollment | <2005-9000,D,R> [goto DRGPREMX] |
| 14 | DRGPREMX | DRGPREMX | What is the monthly premium for ^NAMESYOUR Medicare Prescription Drug plan? <br> - Do not include any monthly co-payments paid by the household. | <1-999> [IF DRGPREMX It 20 or gt 100 gt ERR1_DRGPREMX] <br> [ELSE goto HHDRGSS] |

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  |  | <0,D,R> [goto HHDRGSS] |
| 14 | HHDRGSS | HHDRGSS | Is the monthly premium deducted from a Social Security payment? | $<1,2, \mathrm{D}, \mathrm{R}>\quad$ [goto ENROLLMO for the next line number entered in DRUGPLAN, [IF no more line numbers AND 8500.MDCDENR ne 1 goto MDCDENR] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ | [ELSE goto CHGMDCDE] |
| 14 | CHGMDCDE | CHGMDCDE | Last time you said that (Amount in 8500.MDCDCOV) ^MEMBARE enrolled in Medicaid. Has the number of members enrolled in Medicaid changed? | $<1>$ [goto MDCDCOV] <br> $<2, \mathrm{D}, \mathrm{R}>$ $[$ IF 8500.OTHPLAN = 1 goto STILLOTH] $]$ <br>  $[$ ELSE goto OTHPLAN] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 14 | MDCDENR | MDCDENR | Are ^YOU_ANYMEM enrolled in Medicaid? | $<1>$ $[$ goto MDCDCOV] <br> $<2, \mathrm{D}, \mathrm{R}>$ $[$ [IF 8500.OTHPLAN $=1$ goto STILLOTH] <br>  $[$ ELSE goto OTHPLAN] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 14 | MDCDCOV | MDCDCOV | $\wedge$ MDCDCOV covered by Medicaid? |  |
| 14 | STILLOTH | STILLOTH | Are any members of your household still covered by a plan other than Medicare or Medicaid TRICARE, CHAMPUS, or military health care? | <1,2,D,R> [goto S14C_END] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 14 | OTHPLAN | OTHPLAN | Are ^YOU_ANYMEM covered by any plan other than Medicare or Medicaid which provides free health care such as TRICARE, CHAMPUS or military health care? | <1,2,D,R> [goto S14C_END] |
|  |  |  | $\begin{aligned} & \text { 1. Ys } \\ & \text { 2. No } \end{aligned}$ |  |
| 15 | S15A_INTRO | S15A_INTRO | [4] 33-35 | <1> [goto BSect15.BTABLEA.BROW.ITEM] |
|  |  |  | Now I am going to ask some questions about medical payments and reimbursements. I will begin with your payments. |  |



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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 17. Purchase of medical or surgical equipment for general use <br> 95. Continue List <br> 99. None/No more entries <br> 888. Delete a line |  |
| 15 | MEDPDESC | DESCRIPTION | Ask if not apparent Describe the carelservice/item. Description Amount Month (MEDPDESC) (MEDPMTX) (MEDPMTMO) | <30 characters> [goto MEDPGFTC] |
| 15 | MEDPGFTC | MEDPGFTC | Ask if not apparent <br> $\wedge$ WasWere the (description) for a member of your household or someone outside of your household? <br> Description Amount Month (MEDPDESC) (MEDPMTX) (MEDPMTMO) <br> 1. Household member <br> 2. Non-household member | <1,2,D,R> [goto MONTH] |
| 15 | MEDPMTMO | MONTH | In what month was(were) the payment(s) made? <br> ( * Enter 13 for same amount each month of the reference period.) <br> Description Amount Month <br> (MEDPDESC) (MEDPMTX) (MEDPMTMO) <br> 1. January <br> 2. February <br> 3. March <br> 4. April <br> 5. May <br> 6. June <br> 7. July <br> 8. August <br> 9. September <br> 10. October <br> 11. November <br> 12. December <br> 13. ^S15_13Option | <REF_MONTH - CUR_MONTH> [if (MONTH is not within the reference period) then goto ERR3_MONTH] <br> [else goto AMOUNT] <br> <13,D,R> [goto AMOUNT] |
| 15 | MEDPMTX | AMOUNT | (What was the total amount paid in ^MONTH? I What was the total amount paid?/ What is your monthly expense?) <br> Description Amount Month | <1-999999> [If [(MEDPCARY $=110$ and AMOUNT It 5 or gt 2000) or (MEDPCARY = 120 and AMOUNT It 10 or gt 450) OR (MEDPCARY = 200 and AMOUNT It 6 or gt 1400) OR (MEDPCARY = 330 and AMOUNT It 5 or gt 5000) OR |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | (MEDPDESC) (MEDPMTX) (MEDPMTMO) | (MEDPCARY $=410$ and AMOUNT It 5 or gt 800) OR (MEDPCARY $=420$ and AMOUNT It 5 or gt 379) OR (MEDPCARY $=510$ and AMOUNT It 5 or gt 800) OR (MEDPCARY = 520 and AMOUNT It 15 or gt 8000) OR (MEDPCARY $=530$ and AMOUNT It 5 or gt 650) OR (MEDPCARY $=610$ and AMOUNT It 5 or gt 5000) OR (MEDPCARY $=620$ and AMOUNT It 5 or gt 333) OR (MEDPCARY $=630$ and AMOUNT It 6 or gt 300) OR (MEDPCARY $=640$ and AMOUNT It 6 or gt 1350) OR (MEDPCARY $=650$ and AMOUNT It 5 or gt 500) OR (MEDPCARY $=660$ and AMOUNT It 5 or gt 365) OR (MEDPCARY $=700$ and AMOUNT It 20 or gt 10,700) or (MEDPCARY $=710$ and AMOUNT It 5 or gt 1200) ] AND (MONTH ne 13) then goto ERR1_AMOUNT] <br> [IF MEDPCARY and AMOUNT for this record = data on the prechart/input then goto ERR_DUP] [ELSE goto MEDPCB_S] <br> <D,R> [goto MEDPCB_S] |
|  | MEDPCB_S | C | * Enter 'C' for a combined expense | <C> $\quad$ [goto COMBCODE] <EMPTY> $\quad$ [goto MORE] [if anything other than 'C' or blank is entered goto CK_C] |
|  | MEDPCMB | COMBCODE | [14 33-35 ? [F1] <br> What is (description) combined with? <br> Enter all that apply, separate with commas <br> Description Amount Month <br> (MEDPDESC) (MEDPMTX) (MEDPMTMO) <br> 1. Eye examinations, treatments, or surgery <br> 2. Purchase of eye glasses or contact lenses <br> 3. Dental care <br> 4. Hospital room or hospital services <br> 5. Services by medical professionals other than physicians <br> 6. Physician services <br> 7. Lab tests or x-rays <br> 8. Care in convalescent or nursing homes <br> 9. Care for invalids, convalescents, handicapped, or elderly persons in the home <br> 10. Adult day care centers <br> 11. Other medical care and services <br> 12. Hearing aids <br> 13. Prescription drugs | <1-17,77> [goto MORE] |

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[^3]| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |

## SCREEN 3

Have you received any reimbursements for --

- Read each item on list

1. Eye examinations, treatment, or surgery
2. Purchase of eye glasses or contact lenses
3. Dental care
4. Hospital room or hospital services
5. Services by medical professionals other than physicians
6. Physician services

Lab tests or x-rays
8. Care in convalescent or nursing homes
9. Care for invalids, convalescents, handicapped, or elderly persons in the home
10. Adult day care centers
11. Other medical care and services
12. Hearing aids
13. Prescription drugs
14. Rental of supportive or convalescent equipment
15. Purchase of supportive or convalescent equipment
16. Rental of medical or surgical equipment for general use
17. Purchase of medical or surgical equipment for general use
95. Continue List
99. None/No more entries
99. None/No more

- Ask if not appa


# Describe the care/service/item. 

Description Amount Month
(MEDRDESC) (MEDRMBX) (MEDRMBMO
(Were/Was) the (description) for a member of your household or someone outside of your household?

$$
\frac{\text { Description Amount Month }}{(\text { MEDRDESC })(\text { MEDRMBX })(\text { MEDRMBMO })}
$$

| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 1. Household member <br> 2. Non-household member |  |
| 15 | MEDRMBMO | MONTH | In what month was(were) the reimbursement(s) received? | <REF_MONTH - CUR_MONTH> [if entry not within the reference period then goto ERR3_MONTH] [ELSE goto AMOUNT |
|  |  |  |  | <D,R> [goto AMOUNT] |
|  |  |  | 1. January <br> 2. February <br> 3. March <br> 4. April <br> 5. May <br> 6. June <br> 7. July <br> 8. August <br> 9. September <br> 10. October <br> 11. November <br> 12. December |  |
| 15 | MEDRMBX | AMOUNT | What was the total amount received (month)? $\frac{\text { Description Amount Month }}{(\text { MEDRDESC })(\text { MEDRMBX })(M E D R M B M O)}$ | <1-999999> [IF (MEDRCARY = 110 and AMOUNT It 5 or gt 2300) OR (MEDRCARY $=120$ and AMOUNT It 13 or gt 450) OR (MEDRCARY $=200$ and AMOUNT It 20 or gt 1400) OR (MEDRCARY $=330$ and AMOUNT It 5 or gt 5000) OR (MEDRCARY $=410$ and AMOUNT It 8 or gt 800) OR (MEDRCARY $=420$ and AMOUNT It 5 or gt 980) OR (MEDRCARY $=510$ and AMOUNT It 5 or gt 800) OR (MEDRCARY $=520$ and AMOUNT It 5 or gt 8000) OR (MEDRCARY = 530 and AMOUNT It 5 or gt 650) OR (MEDRCARY $=610$ and AMOUNT It 10 or gt 3208) OR (MEDRCARY $=620$ and AMOUNT It 7 or gt 850) OR (MEDRCARY $=630$ and AMOUNT It 15 or gt 900) OR (MEDRCARY $=640$ and AMOUNT It 15 or gt 1350) OR (MEDRCARY $=650$ and AMOUNT It 32 or gt 500) OR (MEDRCARY $=660$ and AMOUNT It 32 or gt 300) OR (MEDRCARY $=700$ and AMOUNT It 20 or gt 10700) or (MEDRCARY $=710$ and AMOUNT It 5 or gt 1200) then goto ERR1_AMOUNT] <br> [if MEDRCARY and the entry in AMOUNT for this record are equal to any records data in the pre- chart/input then goto ERR_DUP] |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  |  |  $[$ ELSE goto C] <br> <D,R> $\quad[$ goto C]  |
| 15 | MEDRCB_S | C | ¢ Enter 'C' for a combined reimbursement | <C> <br> <empty> $>$ <br> [goto COMBCODE] <br> [goto MORE] <br> [IF anything other than ' C ' or the enter key is entered, goto <br> CK_C] |
|  | MEDRCMB | COMBCODE | [EA 33-35 ? [F1] <br> What other medical reimbursement is (description) combined with? <br> Enter all that apply, separate with commas <br> Description Amount Month <br> (MEDRDESC) (MEDRMBX) (MEDRMBMO) <br> 1. Eye examinations, treatments, or surgery <br> 2. Purchase of eye glasses or contact lenses <br> 3. Dental care <br> 4. Hospital room or hospital services <br> 5. Services by medical professionals other than physicians <br> 6. Physician services <br> 7. Lab tests or x-rays <br> 8. Care in convalescent or nursing homes <br> 9. Care for invalids, convalescents, handicapped, or elderly persons in the home <br> 10. Adult day care centers <br> 11. Other medical care and services <br> 12. Hearing aids <br> 13. Prescription drugs <br> 14. Rental of supportive or convalescent equipment <br> 15. Purchase of supportive or convalescent equipment <br> 16. Rental of medical or surgical equipment for general use <br> 17. Purchase of medical or surgical equipment for general use <br> 77. Misc. combined (unable to specify/DK) | <1-17, 77> [goto MORE] |
| 15 | MEDRMORE | MORE | Did ^YOU_ANYMEM receive any other reimbursements for (description)? <br> Description Amount Month <br> (MEDRDESC) (MEDRMBX) (MEDRMBMO) <br> 1. Yes <br> 2. No | <1> [IF ROW number = 22 goto ERR_MAX] <br> [ELSE goto ITEM, next line of grid] <br> <2,D,R> [goto ITEM, next line of grid] |

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
| 16 | EDA_INTRO | EDA_INTRO | [1436 | <1> [goto BTableA.Brow.ITEM] |
|  |  |  | Now I am going to ask about education expenses. Please include any direct payments made for any members of your household or for anyone outside your household and any payments you made online or had automatically deducted. <br> Description Type Month Amount <br> (EDUDESC) (EDSHL_A) (EDMONTHA) (EDEXOXA) |  |
|  |  |  | 1. Enter 1 to Continue |  |
| 16 | EDA_ITEM | ITEM | [12 36 ? [F1] <br> Since the first of ${ }^{\wedge}$ REF_MONTH, have ${ }^{\wedge}$ YOU_ANYMEM paid for any - Read each item on list. <br> - Baby sitting and in home day care are collected in Section 19A | <1-8> [goto DESCRIPTION] <br> <99> [goto S16_END] <br> <888> [goto ITEM - next line of grid] <br> [If no more grid lines goto S16_END] |

1. Any recreational lessons or other instructions?
2. Nursery school or child day care centers?
3. Tuition?
4. Housing while attending school?
5. Food or board while attending school?
. Private school bus service?
6. Test preparation or tutoring services?
7. Purchase of any school books, supplies, or equipment which has not already been reported?
8. Other school related expenses not already reported?
9. None/No more entries
10. None/No more e
11. Delete the line

What was the expense for?
<30 characters> [goto WHO]
Description Type Month Amount
(EDUDESC) (EDSHL_A) (EDMONTHA) (EDEXOXA)
16 EDUCGFTC WHO $\quad$ Was this expense for? $<1,2, \mathrm{D}, \mathrm{R}>$ [goto SCHOOL]

$$
\frac{\text { Description Type Month Amount }}{(\text { EDUDESC })\left(E D S H L \_A\right)(E D M O N T H A) ~(E D E X O X A) ~}
$$

| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 1. Someone inside the household? <br> 2. Someone outside the household? |  |
| 16 | EDSCHL_A | SCHOOL | - Ask if not apparent. | <1-6,D,R> [goto MONTH] |
|  |  |  | What kind of school or facility was it? |  |
|  |  |  | $\frac{\text { Description Type } \quad \text { Month Amount }}{(\text { EDUDESC })(\text { (EDSHL_A) (EDMONTHA) (EDEXOXA) }}$ |  |
|  |  |  | 1. College or university <br> 2. Elementary through high school <br> 3. Child day care center <br> 4. Nursery school or preschool <br> 5. Vocational or technical school <br> 6. Other |  |
| 16 | EDMONTHA | MONTH | In what month was the payment made? <br> Enter 13 for same amount each month of the reference period. | <REF_MONTH - CUR_MONTH> [IF entry not in reference period then goto ERR3_MONTH] <br> [ELSE goto AMOUNT] |
|  |  |  | $\frac{\text { Description Type } \quad \text { Month Amount }}{(\text { EDUDESC) }} \text { (EDSHL_A) (EDMONTHA) (EDEXOXA) }$ | <13,D,R> [goto AMOUNT] |
|  |  |  | 1. January <br> 2. February <br> 3. March <br> 4. April <br> 5. May <br> 6. June <br> 7. July <br> 8. August <br> 9. September <br> 10. October <br> 11. November <br> 12. December <br> 13. Same amount each month |  |
| 16 | EDEXOXA | AMOUNT | (How much was paid?/How much is paid monthly?) <br> Description Type Month Amount | <1-999999> [IF (EDUC_AY = 100 and AMOUNT It 10 or gt 544) OR (EDUC_AY = 200 and AMOUNT It 20 or gt 1120) OR (EDUC_AY = 300 and AMOUNT It 28 or gt 6000) OR |

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | (EDUDESC) (EDSHL_A) (EDMONTHA) (EDEXOXA) | (EDUC_AY = 310 and AMOUNT It 35 or gt 3000) OR (EDUC_AY = 320 and AMOUNT It 10 or gt 1980) OR (EDUC_AY $=340$ and AMOUNT It 10 or gt 465) OR (EDUC_AY = 350 and AMOUNT It 5 or gt 500) OR (EDUC_AY = 360 and AMOUNT It 5 or gt 600) then goto ERR1_AMMOUNT] <br> [ELSEIF EDUC_AY and the entry in AMOUNT for this record are equal to any records data in the prechart/input then goto ERR_DUP] [ELSE goto C] <br> $<\mathrm{D}, \mathrm{R}>\quad$ [goto C$]$ |
| 16 | EDUCMB_S | C | - Enter 'C' for a combined expense | <C> $\quad$ [goto COMBCODE] <empty> $\quad$ [goto REIMB] [IF any entry other than a 'C' or the enter key is entered, goto CK_C] |
| 16 | EDUCMB | COMBCODE | [1] 36 ? [F1] <br> What was combined with (Description)? <br> Enter all that apply, separate with commas <br> Description Type Month Amount <br> (EDUDESC) (EDSHL_A) (EDMONTHA) (EDEXOXA) <br> 1. Recreational lessons or other instructions <br> 2. Nursery school or child day care centers <br> 3. Tuition <br> 4. Housing while attending school <br> 5. Food or board while attending school <br> 6. Private school bus service <br> 7. Test preparation or tutoring services <br> 8. Purchase of any school books, supplies, or equipment which has not already been reported <br> 9. Other school related expenses not already reported <br> 77. Misc. combined (unable to specify/DK) | <1-9,77> [goto REIMB] |
| 16 | EDREIMB | REIMB | Has any of this amount been or will any of it be reimbursed by an employer, agency, or other person? | $<1>$ [goto REIMBX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto MORE] |

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
| $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |  |  |  |
| 16 | EDREIMBX | REIMBX | How much was or will be reimbursed? | <1-999999> [IF entry It 15 or gt 6000 then goto ERR1_REIMBX] <br> [ELSE goto MORE] |
| 16 | EDUMORE | MORE | Did you make any other payments for (Description)? | <D,R> [goto MORE] <br> <1> [IF ROW number = 34 then goto ERR_MAX] <br> [ELSE goto ITEM, next line of grid] <br> <2,D,R> [goto ITEM, next line of grid] |
| $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |  |  |  |
| 17 | SUB_INTRO | SUB_INTRO | [437 | <1> [goto BTableA.Brow.ITEM] |
|  |  |  | Now I am going to ask about expenses for subscriptions, memberships, books, and entertainment. Please remember to include any payments you made online or had automatically deducted and include any shipping and handling charges with the cost of any item that was shipped. <br> Description Total Amount Amount in (CUR MONTH) <br> (SUBDESC) (S17PURXA) (S17CMEXX) |  |
|  |  |  | 1. Enter 1 to Continue |  |
| 17 | SUB_ITEM | ITEM | [县 37 ? [F1] <br> SCREEN 1 $\qquad$ <br> Since the first of ^REF_MONTH have ^YOU_ANYMEM purchased any of the following items for your household or for someone outside your household? <br> Read each item on list. <br> SCREEN 2 $\qquad$ <br> Have ^YOU_ANYMEM had any membership costs or other expenses related to any of the following? <br> Do not include contributions to or membership in religious, professional, business, or other tax deductible organizations. | <1-13> [goto DESCRIPTION] <br> $<95>$ [goto next row] <br> $<99>$ [goto S17A_END] <br> $<888>$ [goto ITEM - next line of grid] $]$ <br>  $[$ IF no more grid lines goto S17A_END] |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
| * Read each item on list |  |  |  |  |
|  |  |  | 1. Subscriptions to newspapers, magazines or periodicals. Include online subscriptions. <br> 2. Books purchased from a book club <br> 3. Season tickets to theater, concert series, opera, other musical series, or amusement parks <br> 4. Season tickets to sporting events <br> 5. Encyclopedias or other reference books <br> 6. Golf courses, country clubs, and other social organizations <br> 7. Health clubs, fitness centers, swimming pools, weight loss centers, or other sports and recreational organizations <br> 8. Vacation clubs <br> 9. Civic, service, or fraternal organizations <br> 10. Credit card membership fees <br> 11. Shopping memberships including warehouse clubs like Sam's club and discount memberships like Amazon Prime <br> 12. Services that use Global Positioning System or GPS, such as OnStar, not already reported <br> 13. Direct or online dating services <br> 95. Continue list <br> 99. None/No more entries <br> 888. Delete the line |  |
| $\frac{\text { Description Total Amount Amount in (CUR MONTH) }}{\text { (SUBDESC) } \quad \text { (S17PURXA) } \quad \text { (S17CMEXX) }}$ |  |  |  |  |
| 17 | S17GFTCA | WHO | Was this purchase for your household or someone outside your household? | <1,2,D,R> [goto AMOUNT] |
| 1. For household <br> 2. For someone outside your household |  |  |  |  |
| 17 | S17PURXA | AMOUNT | What was the total cost since the first of ^REF_MONTH? (Include shipping and handling fees.) $\frac{\text { Description Total Amount Amount in (CUR MONTH) }}{\text { (SUBDESC) } \quad \text { (S17PURXA) } \quad \text { (S17CMEXX) }}$ | <1-999999> [IF (ITEMCODEOUT = 150, 200 and AMOUNT It 7 or gt 145) OR (ITEMCODEOUT $=500$ and AMOUNT It 5 or gt 720) OR (ITEMCODEOUT $=600$ and AMOUNT It 5 or gt 2500) OR (ITEMCODEOUT = 700 and AMOUNT It 5 or gt 550) OR (ITEMCODEOUT $=800$ or 830 and AMOUNT It 5 or gt 1060) OR (ITEMCODEOUT $=810,820,840$ and AMOUNT It 5 or gt 300) OR (ITEMCODEOUT = 910 and AMOUNT It 5 or gt 1000) OR (ITEMCODEOUT = 930 and AMOUNT It 5 or gt 1200) then goto ERR1_AMOUNT) |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  |  | [ELSE goto S17CMEXX] |
|  |  |  |  | <D,R> [goto S17CMEXX] |
| 17 | S17CMEXX | S17CMEXX | How much of the total amount was paid this month? | <0-999999> [IF (ITEMCODEOUT = 150, 200 and S17CMEXX is $1-5$ or gt 145) OR (ITEMCODEOUT $=500$ and S17CMEXX is 1-5 or gt 720) OR (ITEMCODEOUT = 600 and S17CMEXX is $1-5$ or gt 2500) OR (ITEMCODEOUT $=700$ and S17CMEXX is 1-5 or gt 550) OR (ITEMCODEOUT $=800$ or 830 and S17CMEXX is 1-5 or gt 1060) OR (ITEMCODEOUT $=810,820,840$ and S17CMEXX is 1-5 or gt 300) OR (ITEMCODEOUT = 910 and S17CMEXX is It 5 or gt 1000) OR (ITEMCODEOUT = 930 and S17CMEXX is It 5 or gt 1200) then goto ERR1_S17CMEXX] <br> [ELSEIF S17CMEXX gt AMOUNT then goto CK_S17CMEXX] <br> [ELSEIF ITEMCODEOUT and the entries in AMOUNT and S17CMEXX for this record are equal to any records data on the pre-chart/Input then goto ERR_DUP [ELSE goto MORE] <br> <D,R> [goto MORE] |
| 17 | S17AOTHR | MORE | Did you (purchase/pay for) any other (DESCRIPTION)? <br> Description Total Amount Amount in (CUR MONTH) <br> (SUBDESC) (S17PURXA) (S17CMEXX) | <1> [IF ROW number = 20, then goto ERR_MAX] <br> [ELSE goto ITEM, next line of grid] <br> $<2, D, R>$ [goto ITEM, next line of grid] |


|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| 17 | SPORTFEE | SPORTFEE | [4] 38 | ? [F1] | $\begin{aligned} & \hline<1> \\ & <2, D, R> \end{aligned}$ | [goto S17BE] [goto SPORTADM] |

## Paid any fees for participating in sports such as golf, bowling, biking, hockey, football, or swimming?



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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | Since the first of ^REF_MONTH, have ^YOU_ANYMEM . . . <br> Paid any single admissions to spectator sports such as football, baseball, hockey, racing, or track events? <br> Include ticket/admission service fees and surcharges. | <2,D,R> [goto RECADMIT] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 17 | RECADMIT | RECADMIT | [动 38 ? [F1] <br> Since the first of ^REF_MONTH, have ^YOU_ANYMEM . . . <br> Paid any single admissions to performances such as movies, plays, operas, or concerts? <br> - Include ticket/admission service fees and surcharges. | $<1>$ [goto S17BE] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto ENTADMIT] |
|  |  |  | $\begin{aligned} & \text { 1. Ye } \\ & \text { 2. No } \end{aligned}$ |  |
| 17 | ENTADMIT | ENTADMIT | [6] 38 ? [F1] <br> Since the first of ^REF_MONTH, have ^YOU_ANYMEM . . . <br> Paid any single admission to other entertainment activities such as museums, amusement parks, zoos, or state parks? <br> - Include ticket/admission service fees and surcharges. | $<1>$ [goto S17BE] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto OTHEBKRF] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 17 | OTHRBKRF | OTHRBKRF | [14 38 ? [F1] <br> Since the first of ${ }^{\wedge}$ REF_MONTH, have ${ }^{\wedge}$ YOU_ANYMEM . . . <br> Bought any books, including paperbacks, which were not purchased through a book club? Do not include school books or reference books. | $\begin{array}{ll} \hline<1> & \text { [goto S17BE] } \\ <2, \mathrm{D}, \mathrm{R}> & \text { [goto NEWSMAG] } \end{array}$ |

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 17 | NEWSMAG | NEWSMAG | [14 38 ? [F1] | $<1>$ [goto S17BE] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto FILM] |
|  |  |  | Since the first of ^REF_MONTH, have ^YOU_ANYMEM |  |
|  |  |  | Purchased single copies of newspapers, magazines, or periodicals (non-subscription)? |  |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 17 | FILM | FILM | $\text { [1 } 38 \quad ?[\mathrm{~F} 1]$ <br> Since the first of ^REF_MONTH, have ^YOU_ANYMEM . . . | $<1>$ [goto S17BE] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto FILMPRCS] |

Purchased any photographic film?

|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| 17 | FILMPRCS | FILMPRCS | [4] 38 | ? [F1] | $\begin{aligned} & \hline<1> \\ & <2, \mathrm{D}, \mathrm{R}> \end{aligned}$ | [goto S17BE] [goto RECORDYN] |

# Paid for film processing or the printing of digital photographs? 



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| :---: | :---: | :---: | :---: | :---: |
| 17 | AUDIOFIL | AUDIOFIL | $\text { Af } 38 \quad ?[F 1]$ | $\begin{array}{ll} \hline<1> & \text { [goto S17BE] } \\ <2, \mathrm{D}, \mathrm{R}> & \text { [goto VIDEOPUR] } \end{array}$ |
|  |  |  | Since the first of $\wedge$ REF_MONTH, have ${ }^{\wedge}$ YOU_ANYMEM . |  |
|  |  |  | Paid to listen to or download music files? |  |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 17 | VIDEOPUR | VIDEOPUR | [A] 38 ? [F1] | $\begin{array}{ll} \hline<1> & \text { [goto S17BE] } \\ <2, \mathrm{D}, \mathrm{R}> & \text { [goto VIDEORNT] } \end{array}$ |
|  |  |  | Since the first of $\wedge$ REF_MONTH, have ${ }^{\wedge} \mathrm{YOU}$ _ANYMEM . |  |
|  |  |  | Purchased any Blu-ray discs, DVDs, or VHS tapes? <br> - Report blank video tapes or blank DVDs in Section 6B under item code 13. <br> 1. Yes <br> 2. No |  |
|  |  |  |  |  |
| 17 | VIDEORNT | VIDEORNT | LH 38 ? [F1] | $\begin{array}{l\|l} \hline<1> & \text { [goto S17BE] } \\ <2, \mathrm{D}, \mathrm{R}> & \text { [goto VIDEOFIL] } \end{array}$ |
|  |  |  | Since the first of ^REF_MONTH, have ^YOU_ANYMEM |  |
|  |  |  | Rented any Blu-ray discs, DVDs, or VHS tapes?1. Yes2. No |  |
|  |  |  |  |  |
| 17 | VIDEOFIL | VIDEOFIL | [4] 38 ? [F1] |  |
|  |  |  | Since the first of ^REF_MONTH, have ^YOU_ANYMEM . . |  |
|  |  |  | Paid to view or download video files? |  |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 17 | APPGMRNG | APPGMRNG | [A] 38 ? [F1] <br> Since the first of ^REF MONTH, have ^YOU ANYMEM | $<1>$ [goto S17BE] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto ONLINENT] |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |

## Purchased any applications, games, or ringtones for a cell phone or

 other handheld device, not already reported?
## 1. Yes

2. No


Since the first of ${ }^{\wedge}$ REF_MONTH, have ${ }^{\wedge}$ YOU_ANYMEM
Paid for online games or other internet entertainment sites?

## 1. Yes

17 S17BE $\quad$ 2. No
<1-99999> IF [(SPRTFEEX It 6 or gt 750) OR (SPORTADX It 5 or gt 500) OR (RECADMX It 5 or gt 320) OR ENTADMX It 5 or OTHBKRFX It 5 or gt 300) OR (NEWSMAGX It 5 or gt 250) OR NEWSMA XIt 8 or ght OR RIM It 5 or at 100) OR MMPRCSX 5 or 150 )
FLMPRCSX 5 or gt 150) OR
VIDOPURX It 5 or gt 209)
VIDORNTX It 5 or gt 150)
AUDIOFLX It 1 or gt 50)
(APPGMRGX It 1 or gt 30)
APPGMRGX It 1 or gt 30 )
then goto ERR1 S17BE] [ELSE goto S17BCM]
<D,R> [goto next appropriate screener]
17 S17BCM $\quad$ S17BCM How much of the total amount was spent this month?
<0-99999> [IF (SPFEECMX gt 180) or (SPRTADXC gt 500) OR (RECADMXC gt 100) OR (ENTADXCM gt 500) OR
(OTHBKRCM gt 70) OR (NEWMAGCM gt 250) O
(RECORDXM gt 60) OR (FILMXCM gt 25) OR
(FLMPRXCM gt 40) OR (VDPURXCM gt 62) OR
(VDRNTXCM gt 30) OR (AUDFLXCM gt 50) OR
(VDFILXCM gt 100) OR (APGRGXCM gt 30) OR
(ONLNTXCM gt 50) then goto ERR1_S17BCM]
[ELSEIF S17BCM gt s17BE then goto CK_S17BCM]

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|  |  |  |  | [ELSE goto next appropriate screener] <br> <D,R> [goto next appropriate screener] |
| 18 | ANYOUTSD | ANYOUTSD | Now I am going to ask about trips and vacations. <br> Since the first of ^REF_MONTH have ^YOU_ANYMEM taken any trips entirely paid for by anyone outside your household, such as a business, employer, or relative? | $<1>$ [goto NUMOUTSD] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto CHKUNTRP] |
|  |  |  | 1. Yes <br> 2. No |  |
| 18 | NUMOUTSD | NUMOUTSD | How many? | <1-16,D,R> [goto ANYYUPD] |
| 18 | ANYYUPD | ANYYUPD | Even on trips entirely paid for by someone outside of your household there are sometimes miscellaneous expenses which are not paid for. Did ^YOU_YRCU have any expenses on (this trip/these trips) that will not be covered by a business, employer or other non-household member? | $<1>$ [goto FOODYUPD] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto CHKUNTRP] |
|  |  |  | 1. Yes <br> 2. No |  |
| 18 | FOODYUPD | FOODYUPD | Did these expenses include anything for ... ... Food and beverages? | <1,2,D,R> [goto LODGYUPD] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 18 | LODGYUPD | LODGYUPD | Did these expenses include anything for . . . . . Lodging? | <1,2,D,R> [goto TRANYUPD] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 18 | TRANYUPD | TRANYUPD | Did these expenses include anything for ... | <1,2,D,R> [goto ELSEYUPD] |

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
| 2. No |  |  |  |  |
| 18 | ELSEYUPD | ELSEYUPD | Did these expenses include <br> ... Anything else? | $<1>$ [goto S18AELSE] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto TOTYUPDX] |
| $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |  |  |  |
| 18 | S18AELSE | S18AELSE | - Specify: | <30 characters> [goto TOTYUPDX] |
| 18 | TOTYUPDX | TOTYUPDX | What was the total amount of these expenses? | $\begin{gathered} \hline \text { <1-99999999> [IF entry It } 5 \text { or gt } 1200 \text { then goto } \\ \text { ERR1_TOTYUPDX] } \\ {[\text { ELSE goto CHKUNTRP] }} \end{gathered}$ |
|  |  |  |  | <D,R> [goto CHKUNTRP] |
| 18 | ENDTRP1 | ENDTRP1 | (Last interview you reported (\# unfinished trips) (trip/trips) which had not yet ended. I'd like to In what month did your trip to ^PLACENAME end? <br> Destination Ended How paid Number of trips <br> (TRPPLACE) (ENDTRP2) (ANYBOTH2) (NUMTRIPS) <br> 0. Trip not ended <br> 1. January <br> 2. February <br> 3. March <br> 4. April <br> 5. May <br> 6. June <br> 7. July <br> 8. August <br> 9. September <br> 10. October <br> 11. November <br> 12. December | <0> [goto next line on grid] <br> [if no more unended trips, exit block and goto ANYTRIPS] <br> <REF_MONTH - CUR_MONTH> [IF ENDTRP1 is not within reference period, then goto ERR3_ENDTRP1] <br> [ELSE goto ANYBOTH1] <D,R> [goto ANYBOTH1] |
| 18 | ANYBOTH1 | ANYBOTH1 | Did a business, employer, or any other non-household member pay any of the costs for this trip? | <1,2,D,R> [goto ENDTRP1, next line of grid] [If no more unended trips, exit the block and goto ANYTRIPS] |

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
| 18 | ENDTRP2 | ENDTRP2 | In what month did this trip end? <br> (0) Trip not ended <br> Destination Ended How paid Number of trips <br> (TRPPLACE) (ENDTRP2) (ANYBOTH2) (NUMTRIPS) <br> 0. Trip not ended <br> 1. January <br> 2. February <br> 3. March <br> 4. April <br> 5. May <br> 6. June <br> 7. July <br> 8. August <br> 9. September <br> 10. October <br> 11. November <br> 12. December | <0> [goto S18MORE] <br> <REF_MONTH-CUR_MONTH> [IF trip is not within the reference period, then goto ERR3_ENDTRP2] <br> [ELSEIF INTNMBR = 1 goto S18MORE] <br> [ELSE goto MORTHONE] <br> <D,R> [IF INTNMBR = 1 goto S18MORE] [ELSE goto MORTHONE] |
| 18 | MORTHONE | MORTHONE | Did you take more than one trip to (trip destination) in (month trip ended)? <br> Destination Ended How paid Number of trips <br> (TRPPLACE) (ENDTRP2) (ANYBOTH2) (NUMTRIPS) | $<1>$ [goto NUMTRIPS] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto ANYBOTH2] |


|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| :---: | :---: | :---: | :---: | :---: |
| 18 | NUMTRIPS | NUMTRIPS | How many times did you go to (trip destination) in (month trip ended)? | <2-16,D,R> [goto ANYBOTH2] |
|  |  |  | Destination Ended How paid Number of trips (TRPPLACE) (ENDTRP2) (ANYBOTH2) (NUMTRIPS) |  |
| 18 | ANYBOTH2 | ANYBOTH2 | Were any of the expenses for (this trip/these trips) paid for by anyone outside of your household? | ,2,D,R> [goto S18MORE] |

## Were any of the expenses for (this trip/these trips) paid for <br> by anyone outside of your household?

<1,2,D,R> [goto S18MORE]
Destination Ended How paid Number of trips
(TRPPLACE) (ENDTRP2) (ANYBOTH2) (NUMTRIPS)

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 2. No |  |
| 18 | S18MORE | S18MORE | [4] 39 ? [F1] | $<1>$ [goto TRIPPLAC, next line on the grid]] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto S18A_END] |
|  |  |  | Since the first of $\wedge$ REF_MONTH, have you taken any other trips for reasons such as: <br> * Visiting relatives or friends? <br> * Business? <br> * Recreational trips? <br> * Other trips overnight or longer? <br> * Day trips of at least 75 miles away from home? |  |
|  |  |  | 1. Yes <br> 2. No |  |
| 18 | NUMNIGHT | NUMNIGHT | (Now I'm going to ask you about the ^TRIP that ^YOU_YRCU took to ^TRPPLACE ending in ^NUMNIGHTC/You | $<0-800>$ [IF entry gt 90 then goto ERR1_NUMNIGHT] <br>  [ELSE goto PKGTRIP] <br> $<$ D,R> [goto PKGTRIP] <br> $<888>$ [goto S18BC_END] |
|  |  |  | (Since (youlyour CU) took a set of similar trips to (Trip destination) in (month trip ended), I wil |  |
|  |  |  | How many nights did ^YOU_ANYMEM spend away from home on (these trips/this trip)? |  |
|  |  |  | Enter 0 for none <br> Enter 888 to delete this trip |  |
| 18 | PKGTRIP | PKGTRIP | (Sometimes when people take a trip they have some sort of package deal that covers some or all of the costs.) | $<1>$ [goto FOODDEAL] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto TRPTRNS] |
|  |  |  | Was all or part of (these trips/this trip) covered by a package deal? |  |



|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| :---: | :---: | :---: | :---: | :---: |
| 18 | LODGDEAL | LODGDEAL | Did the package deal include | <1,2,D,R> [goto TRANDEAL] |


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|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 18 | TRANDEAL | TRANDEAL | Did the package deal include <br> ... Transportation? | <1,2,D,R> [goto ELSEDEAL] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 18 | ELSEDEAL | ELSEDEAL | Did the package deal include ... Anything else? | <1> [goto S18BELSE] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto PKGTRIPX] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 18 | S18BELSE | S18BELSE | ${ }^{+}$Specify: | <30 characters> [goto PKGTRIPX] |
| 18 | PKGTRIPX | PKGTRIPX | How much did ^YOU_YRCU pay for the package deal? | ```\(<1\)-999999> [IF entry It 5 or gt 7000 then goto ERR1_PKGTRIPX] [ELSE goto TRPTRNS] <D,R> [goto TRPTRNS]``` |
|  | TRPTRNS | TRPTRNS | [EA 39 ? [F1] <br> Starting at the beginning of this trip, please tell me all the kinds of transportation ^YOU_ANYMEM used from the time you (they) left home to the time you (they) got back home. <br> Enter all that apply, separate with commas <br> 1. Local (taxi, etc.) <br> 2. Airplane <br> 3. Train <br> 4. Bus <br> 5. Ship <br> 6. Automobile (Rented) <br> 7. Truck, van (Rented) <br> 8. Motorcycle, moped (Rented) <br> 9. Private plane (Rented) <br> 10. Boat, trailer (Rented) <br> 11. Camper (Rented) | <1-15> [IF 1 is selected, goto CMLOCALX] [ELSEIF 2 is selected, goto CMPLANEX] [ELSEIF 3 is selected, goto CMTRAINX] [ELSEIF 4 is selected, goto CMBUSX] [ELSEIF 5 is selected, goto CMSHIPX] [ELSEIF 6 is selected, goto RTCARX] [ELSEIF 7 is selected, goto RTTRUCKX] [ELSEIF 8 is selected, goto RTMOPEDX] [ELSEIF 9 is selected, goto RTPLANEX] [ELSEIF 10 is selected, goto RTBOATX] [ELSEIF 11 is selected, goto RTCAMPX] [ELSEIF 12 is selected, goto RTOTHERX] [ELSEIF 13-15 is selected, goto ANYGAS] |


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|  |  |  | 12. Other vehicles (Rented) <br> 13. Automibles or other vehicles privately owned or leased by household <br> 14. Vehicle owned by someone else (Private) <br> 15. Other transport (Private) |  |
| 18 | CMLOCALX | CMLOCALX | How much did ^YOU_ANYMEM spend for local transportation (taxi, etc.) (other than what the package deal covered/ )? | <0-999999,D,R> [IF entry gt 640 and ne DK or RF goto ERR1_CMLOCALX] <br> [if 2 is selected in TRPTRNS, goto CMPLANEX] [if 3 is selected in TRPTRNS, goto CMTRAINX] [if 4 is selected in TRPTRNS, goto CMBUSX] [if 5 is selected in TRPTRNS, goto CMSHIPX] [if 6 is selected in TRPTRNS, goto RTCARX] [if 7 is selected in TRPTRNS, goto RTTRUCKX] [if 8 is selected in TRPTRNS, goto RTMOPEDX] [if 9 is selected in TRPTRNS, goto RTPLANEX] [if 10 is selected in TRPTRNS, goto RTBOATX] [if 11 is selected in TRPTRNS, goto RTCAMPX] [if 12 is selected in TRPTRNS, goto RTOTHERX] [if 13-15 are selected in TRPTRNS, goto ANYGAS] [else, goto LODGING] |
| 18 | CMPLANEX | CMPLANEX | How much did ^YOU_ANYMEM spend for airfare (other than what the package deal covered/ )? | <0-999999, D,R> [IF entry gt 2000 and ne DK or RF then goto ERR1_COMPLANEX] <br> [if 3 is selected in TRPTRNS, goto CMTRAINX] <br> [if 4 is selected in TRPTRNS, goto CMBUSX] <br> [if 5 is selected in TRPTRNS, goto CMSHIPX] <br> [if 6 is selected in TRPTRNS, goto RTCARX] <br> [if 7 is selected in TRPTRNS, goto RTTRUCKX] <br> [if 8 is selected in TRPTRNS, goto RTMOPEDX] <br> [if 9 is selected in TRPTRNS, goto RTPLANEX] <br> [if 10 is selected in TRPTRNS, goto RTBOATX] <br> [if 11 is selected in TRPTRNS, goto RTCAMPX] <br> [if 12 is selected in TRPTRNS, goto RTOTHERX] <br> [if 13-15 are selected in TRPTRNS, goto ANYGAS] <br> [else, goto LODGING] |
| 18 | CMTRAINX | CMTRAINX | How much did ^YOU_ANYMEM spend for train fare (other than what the package deal covered/ )? | <0-999999,D,R> [if entry gt CMTRAINX and ne DK or RF then goto ERR1_CMTRAINX] <br> [if 4 is selected in TRPTRNS, goto CMBUSX] [if 5 is selected in TRPTRNS, goto CMSHIPX] [if 6 is selected in TRPTRNS, goto RTCARX] [if 7 is selected in TRPTRNS, goto RTTRUCKX] [if 8 is selected in TRPTRNS, goto RTMOPEDX] [if 9 is selected in TRPTRNS, goto RTPLANEX] [if 10 is selected in TRPTRNS, goto RTBOATX] [if 11 is selected in TRPTRNS, goto RTCAMPX] [if 12 is selected in TRPTRNS, goto RTOTHERX] |

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|  |  |  |  | [if 13-15 are selected in TRPTRNS, goto ANYGAS] [else, goto LODGING] |
| 18 | CMBUSX | CMBUSX | How much did ^YOU_ANYMEM spend for bus fare (other than what the package deal covered/ )? | <0-999999, D, R> [if entry gt 315 and ne D or R then goto ERR1_CMBUSX] <br> [if 5 is selected in TRPTRNS, goto CMSHIPX] [if 6 is selected in TRPTRNS, goto RTCARX] [if 7 is selected in TRPTRNS, goto RTTRUCKX] [if 8 is selected in TRPTRNS, goto RTMOPEDX] [if 9 is selected in TRPTRNS, goto RTPLANEX] [if 10 is selected in TRPTRNS, goto RTBOATX] [if 11 is selected in TRPTRNS, goto RTCAMPX] [if 12 is selected in TRPTRNS, goto RTOTHERX] [if 13-15 are selected in TRPTRNS, goto ANYGAS] [else, goto LODGING] |
| 18 | CMSHIPX | CMSHIPX | How much did ^YOU_ANYMEM spend for ship fare (other than what the package deal covered/ )? | <0-999999,D,R> [if entry gt 2800 and ne D or R, then goto ERR1_CMSHIPX] <br> [if 6 is selected in TRPTRNS, goto RTCARX] [if 7 is selected in TRPTRNS, goto RTTRUCKX] [if 8 is selected in TRPTRNS, goto RTMOPEDX] [if 9 is selected in TRPTRNS, goto RTPLANEX] [if 10 is selected in TRPTRNS, goto RTBOATX] [if 11 is selected in TRPTRNS, goto RTCAMPX] [if 12 is selected in TRPTRNS, goto RTOTHERX] [if 13-15 are selected in TRPTRNS, goto ANYGAS] [else, goto LODGING] |
| 18 | RTCARX | RTCARX | How much did ^YOU_ANYMEM spend for rented automobiles, not including gas ^YOU_ANYMEM bought (other than what the package deal covered/ )? | <0-999999,D,R> [if entry gt 719 and ne D or R then goto ERR1_RTCARX] <br> [if 7 is selected in TRPTRNS, goto RTTRUCKX] [if 8 is selected in TRPTRNS, goto RTMOPEDX] [if 9 is selected in TRPTRNS, goto RTPLANEX] [if 10 is selected in TRPTRNS, goto RTBOATX] [if 11 is selected in TRPTRNS, goto RTCAMPX] [if 12 is selected in TRPTRNS, goto RTOTHERX] [if 13-15 are selected in TRPTRNS, goto ANYGAS] [else, goto ANYGAS] |
| 18 | RTTRUCKX | RTTRUCKX | How much did ^YOU_ANYMEM spend for rented trucks or vans, not including gas ^YOU_ANYMEM bought (other than what the package deal covered/ )? | <0-999999, D,R> [if entry gt 1400 and ne D or R then goto ERR1_RTTRUCKX] <br> [if 8 is selected in TRPTRNS, goto RTMOPEDX] [if 9 is selected in TRPTRNS, goto RTPLANEX] [if 10 is selected in TRPTRNS, goto RTBOATX] [if 11 is selected in TRPTRNS, goto RTCAMPX] [if 12 is selected in TRPTRNS, goto RTOTHERX] [if 13-15 are selected in TRPTRNS, goto ANYGAS] [else, goto ANYGAS] |

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| 18 | RTMOPEDX | RTMOPEDX | How much did ^YOU_ANYMEM spend for rented motorcycles or mopeds, not including gas ^YOU_ANYMEM bought (other than what the package deal covered/ )? | <0-999999, D,R> [if entry gt 250 and ne D or R then goto ERR1_RTMOPEDX] <br> [if 9 is selected in TRPTRNS, goto RTPLANEX] [if 10 is selected in TRPTRNS, goto RTBOATX] [if 11 is selected in TRPTRNS, goto RTCAMPX] [if 12 is selected in TRPTRNS, goto RTOTHERX] [else, goto ANYGAS] |
| 18 | RTPLANEX | RTPLANEX | How much did ^YOU_ANYMEM spend for rented private planes, not including gas ^YOU_ANYMEM bought (other than what the package deal covered/ )? | <0-999999,D,R> [if entry gt 6000 and ne D or R then goto ERR1_RTPLANEX] <br> [if 10 is selected in TRPTRNS, goto RTBOATX] <br> [if 11 is selected in TRPTRNS, goto RTCAMPX] <br> [if 12 is selected in TRPTRNS, goto RTOTHERX] <br> [else goto ANYGAS] |
| 18 | RTBOATX | RTBOATX | How much did ^YOU_ANYMEM spend for rented boats or trailers, not including gas ^YOU_ANYMEM bought (other than what the package deal covered/ )? | <0-999999,D,R> [if entry gt 400 and ne D or R then goto ERR1_RTBOATX] <br> [if 11 is selected in TRPTRNS goto RTCAMPX] <br> [if 12 is selected in TRPTRNS goto RTOTHERX] <br> [else goto ANYGAS] |
| 18 | RTCAMPX | RTCAMPX | How much did ^YOU_ANYMEM spend for rented campers, not including gas ^YOU_ANYMEM bought (other than what the package deal covered/ )? | <0-999999,D,R> [if entry gt 1375 and ne D or R then goto ERR1_RTCAMPX] <br> [if 12 is selected in TRPTRNS, goto RTOTHERX] [else goto ANYGAS] |
| 18 | RTOTHERX | RTOTHERX | How much did ^YOU_ANYMEM spend for other rented vehicle transportation, not including gas ^YOU_ANYMEM bought (other than what the package deal covered/ )? | <0-999999> [IF entry gt 870 then goto ERR1_RTOTHERX] [ELSE goto ANYGAS] |
|  |  |  |  | <D,R> [goto ANYGAS] |
| 18 | ANYGAS | ANYGAS | While on the trip did ^YOU_ANYMEM stop to buy any gasoline, diesel fuel, or any other fuels? | $<1>$ [goto GASOILX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto ANYTOLL] |
|  |  |  | 1. Yes <br> 2. No |  |
| 18 | GASOILX | GASOILX | (How much did ^YOU_ANYMEM spend for that?/ What costs for gasoline or other fuels won't be reimbursed?) | <0-999999> [IF entry gt 256 then goto ERR1_GASOILX] [ELSE goto ANYTOLL] |
|  |  |  |  | <D,R> [goto ANYTOLL] |
| 18 | ANYTOLL | ANYTOLL | While on the trip, did ^YOU_ANYMEM spend anything for tolls, not already reported? <br> 1. Yes <br> 2. No | $<1>$ [goto TRPTOLLX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto ANYPARK] |
| 18 | TRPTOLLX | TRPTOLLX | (How much did ^YOU_ANYMEM spend for tolls?/What costs for tolls won't be reimbursed?) | ```<0-999999> [IF entry gt 50 then goto ERR1_TRPTOLLX] [ELSE goto ANYPARK] <D,R> [goto ANYPARK]``` |

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| 18 | ANYPARK | ANYPARK | Did ^YOU_ANYMEM have any parking fees? | $<1>$ [goto PARKINGX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto LODGING] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 18 | PARKINGX | PARKINGX | (How much were they?/What cost for parking fees won't be reimbursed?) | <0-99999999> [IF entry gt 100 then goto ERR1_PARKINGX] <br> [ELSE goto LODGING] |
|  |  |  |  | <D,R> [goto LODGING] |
| 18 | LODGING | LODGING | Did ^YOU_ANYMEM spend anything for hotels, motels, cottages, trailer camps, or other lodging (not counting what the package deal covered/ )? (Do not include expenses previously reported for vacation clubs.) | $<1>$ [goto LDGCOSTX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto TRPFOOD] |
|  |  |  | 1. Yes <br> 2. No |  |
| 18 | LDGCOSTX | LDGCOSTX | (What was the cost, including taxes and tips?/ What costs for lodging, including taxes and tips, won't be reimbursed?) | <0-99999999> [IF entry gt 1600 then goto ERR1_LDGCOSTX] <br> [ELSE goto TRPFOOD] |
|  |  |  |  | <D,R> [goto TRPFOOD] |
| 18 | TRPFOOD | TRPFOOD | Did ^YOU_ANYMEM spend anything for meals, snacks, or drinks at restaurants, bars, or fast food places ^NotCountingTrpFood? | $<1>$ [goto TRPFOODX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto ANYGROC] |
|  |  |  | 1. Yes <br> 2. No |  |
| 18 | TRPFOODX | TRPFOODX | (What was the cost, including taxes and tips?/ What costs for these things won't be reimbursed?) | <0-999999> [IF entry gt 700 then goto ERR1_TRPFOODX] <br> [ELSE goto TRPALCIN] |
|  |  |  |  | <D,R> [goto TRPALCIN] |
| 18 | TRPALCIN | TRPALCIN | Was any of the (amount/\$ (entry in TRPFOODX) for alcoholic beverages? <br> 1. Yes <br> 2. No | $<1>$ [goto TRPALCHX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto ANYGROC] |
| 18 | TRPALCHX | TRPALCHX | (What was the cost for alcoholic beverages, including taxes and trips?/What costs for alcoholic beverages, including taxes and tips, won't be reimburs | ```<0-999999> [IF entry gt 210 then goto ERR1_TRPALCHX] [ELSE goto ANYGROC] <D,R> [goto ANYGROC]``` |

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| 18 | ANYGROC | ANYGROC | Did ^YOU_ANYMEM spend anything for food or beverages at grocery stores, convenience stores, or liquor stores on this trip? <br> 1. Yes <br> 2. No | $<1>$ [goto TRPGROCX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto ANYSPEQP] |
| 18 | TRPGROCX | TRPGROCX | (What were the expenses, including taxes?/What costs, including taxes, won't be reimbursed?) | ```<0-99999999> [IF entry gt 300 then goto ERR1_TRPGROCX] [ELSE goto ANYALC] <D,R> [goto ANYALC]``` |
| 18 | ANYALC | ANYALC | Was any of the (amount/\$ (entry in TRPGROCX) ) for alcoholic beverages? <br> 1. Yes <br> 2. No | $<1>$ [goto TRPALCGX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto ANYSPEQP] |
| 18 | TRPALCGX | TRPALCGX | (What was the cost for alcoholic beverages, including taxes?/What costs for alcoholic beverages, including taxes, won't be reimbursed?) | <0-99999999> [IF entry gt 150 then goto ERR1_TRPALCGX] [ELSE goto ANYSPEQP] <D,R> [goto ANYSPEQP] |
| 18 | ANYSPEQP | ANYSPEQP | [2] 40 ? [F1] <br> Did ^YOU_ANYMEM have any expenses for rental of sports equipment $\wedge$ NotCountingAnySpeqp? <br> 1. Yes <br> 2. No | $<1>$ [goto TRPSPRTX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto ANYSPORT] |
| 18 | TRPSPRTX | TRPSPRTX | (How much did (youlyou or any member of your CU) pay to rent sports equipment?/What costs for renti |  |
| 18 | ANYSPORT | ANYSPORT | Ef 40 ? [F1] <br> Did ^YOU_ANYMEM pay any fees to play sports or exercise ^NOTCOUNTINGANYSPORT? <br> 1. Yes <br> 2. No | $<1>$ [goto TRSPORTX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto ANYENTER] |
| 18 | TRSPORTX | TRSPORTX | (How much did (youlyou or any member of your CU) pay?/What costs for playing sports won't be reimbursed?) | ```<0-999999> [IF entry gt 600 then goto ERR1_TRSPORTX] [ELSE goto ANYENTER] <D,R> [goto ANYENTER]``` |

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| 18 | ANYENTER | ANYENTER | $\text { [14 } 40 \quad ?[F 1]$ <br> Did ^YOU_ANYMEM spend anything on this trip for entertainment or admissions ^NOTCOUNTINGANYENTER? | $<1>$ [goto TRPETRTX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto ANYMISC] |
|  |  |  | 1. Yes <br> 2. No |  |
| 18 | TRPETRTX | TRPETRTX | (How much did (you/you or any member of your CU) spend?/What costs for entertainment and admissions won't be reimbursed?) | $<0-999999>$ [IF entry gt 682 then goto ERR1_TRPETRTX] [ELSE goto ANYMISC] |
|  |  |  |  | <D,R> [goto ANYMISC] |
| 18 | ANYMISC | ANYMISC | Did ^YOU_ANYMEM have any expenses for this trip such as for souvenirs, tourist booklets, and so on? <br> 1. Yes <br> 2. No | <1> $\quad$ [goto TRMISCX] $<2, \mathrm{D}, \mathrm{R}>$ [exit block and goto BIkSect18_BC_3.CHKTCOMB] |
| 18 | TRMISCX | TRMISCX | (How much were these expenses?/What costs for these things won't be reimbursed?) | ```<0-999999> [IF entry gt 600 then goto ERR1_TRMISCX] [ELSE exit block and goto BIkSect18_BC_3.CHKTCOMB] <D,R> [Exit block and goto BIkSect18_BC_3.CHKTCOMB]``` |
| 18 | CHKTCOMB | CHKTCOMB | Are there combined expenses for this trip the respondent was not able to separate? <br> 1. Yes <br> 2. No | $\begin{array}{ll} \hline<1> & \text { [goto TCOMBEST] } \\ <2> & \text { [goto TRPGFTC] } \end{array}$ |
| 18 | TCOMBEST | TCOMBEST | (Only those expenses the respondent could not provide individual expenses for should be combined and entered here./ | ```<1-999999> [IF entry gt 6000 then goto ERR1_TCOMBEST] [ELSE goto FOODCOMB] <D,R> [goto FOODCOMB]``` |
| 18 | FOODCOMB | FOODCOMB | Does this ^${ }^{\text {COMMBQUEX include anything for . . }}$ | <1,2,D,R> [goto LODGCOMB] |

## 1. Yes

2. No

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| 18 | LODGCOMB | LODGCOMB | Does this ${ }^{\wedge}$ COMBQUEX include anything for ... ... Lodging | <1,2,D,R> [goto TRANCOMB] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 18 | TRANCOMB | TRANCOMB | Does this ${ }^{\wedge}$ COMBQUEX include anything for . . Transportation? | <1,2,D,R> [goto ELSECOMB] |
|  |  |  | 1. Yes <br> 2. No |  |
| 18 | ELSECOMB | ELSECOMB | Does this ^COMBQUEX include anything for ... ... Other expenses? | <1,2,D,R> [goto OTHRCOMB] |
|  |  |  | 1. Yes <br> 2. No |  |
| 18 | OTHRCOMB | OTHRCOMB | Does this ^COMBQUEX include <br> .. . Any expenses for others? | <1,2,D,R> [goto TRPGFTC] |
|  |  |  | 1. Yes <br> 2. No |  |
| 18 | TRPGFTC | TRPGFTC | (You've told me about many expenses (youlyou or your CU) had on this trip. Were any of these expens | $<1>$ [goto TRPGTCX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto S18BC_END] |
|  |  |  | 1. Yes <br> 2. No |  |
| 18 | TRPGFTCX | TRPGFTCX | (How much of the total expenses for this trip were for persons outside your CU?/How much of the tota | <1-99999999> [IF entry gt 1100 then goto ERR1_TRPGFTCX] <br> [ELSE goto S18BC_END] |
|  |  |  |  | <D,R> [goto S18BC_END] |
| 18 | ANYNONCU | ANYNONCU | Sometimes people in a household don't take a trip themselves, but pay for part or all of a trip that someone else takes. Since the first of ^REF_MONTH, have ^YOU_ANYMEM paid for part or all of | $<1>$ [goto NUMNONCU] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto S18E_END] |

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|  |  |  | such a trip for any non-household members? |  |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 18 | NUMNONCU | NUMNONCU | How many trips? | <1-16,D,R> [goto FOODNOCU] |
| 18 | FOODNOCU | FOODNOCU | Did these expenses include anything for... ... Food and beverages? | <1,2,D,R> [goto LODGNOCU] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 18 | LODGNOCU | LODGNOCU | Did these expenses include anything for... . . Lodging? | <1,2,D,R> [goto TRANNOCU] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 18 | TRANNOCU | TRANNOCU | Did these expenses include anything for. <br> ... Transportation? | <1,2,D,R> [goto ELSENOCU] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 18 | ELSENOCU | ELSENOCU | Did these expenses include ... | $<1>$ [goto S18EELSE] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto TRNONCUX] |


| $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: |
| 18 | S18EELSE | S18EELSE | - Specify: | <30 characters> [goto TRNONCUX] |
| 18 | TRNONCUX | TRNONCUX | What was the total amount that ${ }^{\wedge} \mathrm{YOU}$ _YRCU paid for (that trip/those trips)? | <1-99999999> [IF entry It 25 or gt 3000 then goto ERR1_TRNONCUX] [ELSE goto S18E_END] |

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|  |  |  |  | <D,R> [goto S18E_END] |
| 18 | ANYLOC | ANYLOC | Sometimes people stay overnight in a local hotel or motel during holidays, family getaways, moves, or home repair. Since the first of ^REF_MONTH, have ^YOU_ANYMEM stayed overnight in a local hotel or motel? | $\begin{array}{ll} \hline<1> & \text { [goto BlkSect18_F.NUMLOC] } \\ <2, \mathrm{D}, \mathrm{R}> & \text { [goto S18F_END] } \end{array}$ |
|  |  |  | 1. Yes 2. No |  |
| 18 | NUMLOC | NUMLOC | How many nights did ^YOU_ANYMEM spend away from home on this stay? | <1-99,D,R> [goto ANYLOCDL] |
| 18 | ANYLOCDL | ANYLOCDL | Sometimes when people stay away from home overnight they have some sort of package deal that covers some or all of the costs. Was all or part of this stay covered by anything like that? | $<1>$ [goto FOODLCDL] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto ANYLODGE] |
|  |  |  | 1. Yes 2. No |  |
| 18 | FOODLCDL | FOODLCDL | Did the package deal include anything for. . . ... Food and beverages? | <1,2,D,R> [goto LODGLCDL] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 18 | LODGLCDL | LODGLCDL | Did the package deal include anything for. . . . Lodging? | <1,2,D,R> [goto ENTRLCDL] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 18 | ENTRLCDL | ENTRLCDL | Did the package deal include anything for ... Entertainment? | <1,2,D,R> [goto ELSELCDL] |
|  |  |  | 1. Yes <br> 2. No |  |
| 18 | ELSELCDL | ELSELCDL | Did the package deal include ... | $<1>$ [goto S18FELSE] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto LOCDEALX] |

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| ... Anything else? |  |  |  |  |
| $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |  |  |  |
| 18 | S18FELSE | S18FELSE | Specify: | <30 characters> [goto LOCDEALX] |
| 18 | LOCDEALX | LOCDEALX | How much did ^YOU_ANYMEM pay for the package deal? | $\begin{gathered} \text { <0-99999999> [IF entry gt } 1500 \text { then goto } \\ \text { ERR1_LOCDEALX] } \\ \text { [ELSE goto ANYLODGE] } \end{gathered}$ |
|  |  |  |  | <D,R> [goto ANYLODGE] |
| 18 | ANYLODGE | ANYLODGE | Did ^YOU_ANYMEM spend anything for hotels, motels, cottages, trailer camps, or other lodging ^Anylodge? | $\begin{array}{lc} \hline<1> & \text { [goto LOCLODGX] } \\ <2, \mathrm{D}, \mathrm{R}> & \text { [goto ANYMEAL] } \end{array}$ |
| $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |  |  |  |
| 18 | LOCLODGX | LOCLODGX | What was the cost, including taxes and tips? | <1-99999999> [IF entry lt 22 or gt 648 then goto ERR1_LOCLODGX] <br> [ELSE goto ANYMEAL] |
|  |  |  |  | <D,R> [goto ANYMEAL] |
| 18 | ANYMEAL | ANYMEAL | Did ^YOU_ANYMEM spend anything for meals, snacks, or drinks at restaurants, bars, or fast food places (not counting what the package deal covered)? | $<1>$ [goto LOCMEALX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto ANYLCGR] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 18 | LOCMEALX | LOCMEALX | What was the cost, including taxes and tips? | <1-99999999> [IF entry It 6 or gt 1000 then goto ERR1_LOCMEALX] <br> [ELSE goto ANYALCML] |
|  |  |  |  | <D,R> [goto ANYALCML] |
| 18 | ANYALCML | ANYALCML | Was any of the (amount/(entry in LOCMEALX)) for alcoholic beverages? <br> 1. Yes <br> 2. No | $<1>$ [goto ALCMEALX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto ANYLCGR] |
| $\begin{array}{r}18 \\ \hline 18\end{array}$ | ALCMEALX | ALCMEALX | What was the cost for alcoholic beverages, including taxes and tips? | ```<1-99999999> [IF entry It 5 or gt 388 then goto ERR1_ALCMEALX] [ELSE goto ANYLCGR] <D,R> [goto ANYLCGR]``` |
| 18 | ANYLCGR | ANYLCGR | Did ^YOU_ANYMEM spend anything for food or beverages at grocery stores, convenience stores, or liquor stores? | $<1>$ [goto LOCGROCX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto ANYADMIS] |

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|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |  |
| 18 | LOCGROCX | LOCGROCX | What were the expenses, including taxes? |  | <1-99999999> [IF entry It 5 or gt 600 then goto ERR1_LOCGROCX] <br> [ELSE goto ANYALCGR] |
|  |  |  |  |  | <D,R> [goto ANYALCGR] |
| 18 | ANYALCGR | ANYALCGR | Was any of the ^GROCX for alcoholic beverages? |  | $<1>$ [goto ALCGROCX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto ANYADMIS] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |  |
| 18 | ALCGROCX | ALCGROCX | What was the cost for alcoholic beverages, including taxes? |  | <1-99999999> [IF entry It 5 or gt 270 then goto ERR1_ALCGROCX] <br> [ELSE goto ANYADMIS] |
|  |  |  |  |  | <D,R> [goto ANYADMIS] |
| 18 | ANYADMIS | ANYADMIS | [4] 40 ? [F1] |  | $<1>$ [goto LOCADMSX] <br> $<2, \mathrm{D}, \mathrm{R}>$ $[$ goto LOCCOMBX] |
|  |  |  | Did ^YOU_ANYMEM spend anything on this stay for entertainment or admissions (not counting what the package deal covered/ )? |  |  |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |  |
| 18 | LOCADMSX | LOCADMSX | How much did ^YOU_ANYMEM pay? |  | $\begin{aligned} & \text { <1-99999999> [IF entry It } 5 \text { or gt } 290 \text { then goto } \\ & \text { ERR1_LOCADMSX] } \\ & \quad[\text { ELSE goto LOCCOMBX] } \end{aligned}$ |
|  |  |  |  |  | <D,R> [goto LOCCOMBX] |
| 18 | CHKFCOMB | CHKFCOMB | Are there combined expenses for food/beverages, lodging, transportation, or other things? <br> 1. Yes <br> 2. No |  | $<1>$ [goto LOCCOMBX] <br> $<2>$ [goto DIDYOU] |
|  |  |  |  |  |  |
| 18 | LOCCOMBX | LOCCOMBX | Only those things the respondent could not provide individual expenses for should be combined and entered here. |  | <1-99999999> [IF entry It 5 or gt 210 then goto ERR1_LOCCOMBX] <br> [ELSE goto FOODLCCM] |
|  |  |  |  |  | <D,R> [goto FOODLCCM] |

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| 18 | FOODLCCM | FOODLCCM | Does this include anything for. . . | <1,2,D,R> [goto LODGLCCM] |



| $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: |
| 18 | ENTRLCCM | ENTRLCCM | Does this include anything for | <1,2,D,R> [goto ELSELCCM |
| . . . Entertainment? |  |  |  |  |
| 1. Yes |  |  |  |  |
|  |  |  | 2. No |  |
| 18 | ELSELCCM | ELSELCCM | Does this include any ... | <1,2,D,R> [goto DIDYOU] |


|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| :---: | :---: | :---: | :---: | :---: |
| 18 | DIDYOU | DIDYOU | Did ^YOU_ANYMEM have any other stays at local hotels or motels? | $<1>$ [goto NUMLOC, next row] <br> $<2, \mathrm{D}, \mathrm{R}>$ [exit block and goto S18F_END] |
|  |  |  | 1. Yes <br> 2. No |  |
| 19 | S19A_INTRO | S19A_INTRO | El 41-42 | <1> [goto BTableA.Brow.ITEM] |

Now I am going to ask about miscellaneous expenses which have not been collected anywhere
else in this survey. Please remember to include any payments you made online or had
automatically deducted.


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 12. Lotteries or games of chance <br> 13. Babysitting, nanny services, or other child care in YOUR home <br> 14. Babysitting, nanny services, or other child care in someone ELSE's home <br> 15. Toys or games? <br> 16. Arts or crafts kits? <br> 17. Sewing and knitting materials for the home? <br> 18. Sewing materials for making clothes? <br> 19. Sewing notions? <br> 20. Other sewing materials? <br> 21. Purchase of pets, pet supplies, or medicine for pets? <br> 22. Pet services? <br> 23. Veterinarian expenses for pets? <br> 24. Food and beverages for catered affairs? <br> 25. Live entertainment? <br> 26. Rental of party supplies? <br> 27. Purchase of upkeep of cemetery lots or vaults? <br> 28. Funerals, burials, or cremation? <br> 95. Continue <br> 99. None/No more entries <br> 888. Delete the line |  |
| 19 | MISCDESC | DESCRIPTION | What was the expense for? | <30 characters> [goto MONTH] |
| 19 | MISCMO | MONTH | In what month did you have this expense? <br> (* Enter 13 for same amount each month of the reference period) $\frac{\text { Description Amount }}{} \text { Month }$ <br> 1. January <br> 2. February <br> 3. March <br> 4. April <br> 5. May <br> 6. June <br> 7. July <br> 8. August <br> 9. September <br> 10. October <br> 11. November <br> 12. December <br> 13. ^S19_13Option | ```<REF_MONTH - CUR_MONTH> [IF Month not in the reference period goto ERR3_MONTH] [ELSE goto WHO] <13> [IF ITEM= 2,9,13,21,22,26,27 or 28 goto CK_MONTH [ELSE goto WHO] <D,R> [goto WHO]``` |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
| 19 | MISCGFTC | WHO | Was this expense for someone inside or outside your household? $\begin{array}{ll} \text { Description } & \text { Amount } \text { Month } \\ \hline \text { (MISCDESC) } & \text { (MISCEXPX) (MISCMO) } \end{array}$ | <1, 2, D, R> [goto AMOUNT] |
|  |  |  | 1. For household <br> 2. For someone outside your household |  |
| 19 | MISCEXPX | AMOUNT | (What was the total amount of this expense?/What is your monthly expense?) <br> (* Do not include legal fees related to real estate closing costs reported in Section 3.) <br> Description Amount Month <br> (MISCDESC) (MISCEXPX) (MISCMO) | <1-999999> [IF (MISCCODE $=100$ and MISCEXPX It 5 or gt 7000) <br> or (MISCCODE $=110$ and MISCEXPX It 10 or gt 3208) <br> or (MISCCODE $=130$ and MISCEXPX It 14 or gt 6840) <br> or (MISCCODE $=140$ and MISCEXPX It 5 or gt 300) <br> or (MISCCODE $=150$ and MISCEXPX It 13 or gt 5000) <br> or (MISCCODE $=160$ and MISCEXPX It 25 or gt 1000) <br> or (MISCCODE $=170$ and MISCEXPX It 15 or gt 600) <br> or (MISCCODE $=180$ and MISCEXPX It 20 or gt 1260) <br> or (MISCCODE $=190$ and MISCEXPX It 10 or gt 3000) <br> or (MISCCODE $=200$ and MISCEXPX It 20 or gt 10700) <br> or (MISCCODE $=210$ and MISCEXPX It 5 or gt 557) <br> or (MISCCODE $=220$ and MISCEXPX It 15 or gt 1600) <br> or (MISCCODE $=230$ and MISCEXPX It 9 or gt 1800) <br> or (MISCCODE $=240$ and MISCEXPX It 5 or gt 300) <br> or (MISCCODE $=250$ and MISCEXPX It 8 or gt 500) <br> or (MISCCODE $=260$ and MISCEXPX It 12 or gt 700) <br> or (MISCCODE $=330$ and MISCEXPX It 5 or gt 550) <br> or (MISCCODE $=340$ and MISCEXPX It 6 or gt 800) <br> or (MISCCODE $=440$ and MISCEXPX It 5 or gt 214) <br> or (MISCCODE $=445$ and MISCEXPX It 5 or gt 214) <br> or (MISCCODE $=450$ and MISCEXPX It 5 or gt 214) <br> or (MISCCODE $=455$ and MISCEXPX It 5 or gt 214) <br> or (MISCCODE $=350$ and MISCEXPX It 5 or gt 1200) <br> or (MISCCODE $=360$ and MISCEXPX It 8 or gt 795) <br> or (MISCCODE $=370$ and MISCEXPX It 19 or gt 300) <br> or (MISCCODE $=380$ and MISCEXPX It 9 or gt 900) <br> or (MISCCODE $=390$ and MISCEXPX It 5 or gt 520) <br> or (MISCCODE $=400$ and MISCEXPX gt 1300) <br> or (MISCCODE $=410$ and MISCEXPX It 14 or gt 7000) <br> or (MISCCODE $=420$ and MISCEXPX It 14 or gt 7000) then goto ERR1_AMOUNT] <br> [ELSEIF MISCCODE and the entry in AMOUNT for this record are equal to any records data on the prechart/input, then display ERR_DUP. <br> [ELSEIF ITEM = 15-28 goto C] |




| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 6. Political organizations? <br> 7. Religious organizations, including churches, temples and mosques? <br> 8. Charities or other organizations? <br> 9. Stocks, bonds, or mutual funds to persons or organizations outside of your household? <br> 95. Continue list <br> 99. None/No more entries <br> 888. Delete the line |  |
| 19 | CONTDESC | DESCRIPTION | What was the (payment/contribution) for? <br> Description Month Amount (CONTDESC) (CONTMO) (CONTEXPX) | <30 characters> [goto MONTH] |
| 19 | CONTMO | MONTH | In what month did you make the (payment/contribution)? <br> * Enter 13 for same (payment/contribution) each month of the reference period. <br> Description Month Amount <br> (CONTDESC) (CONTMO) (CONTEXPX) <br> 1. January <br> 2. February <br> 3. March <br> 4. April <br> 5. May <br> 6. June <br> 7. July <br> 8. August <br> 9. September <br> 10. October <br> 11. November <br> 12. December <br> 13. Same amount each month | <REF_MONTH-CUR_MONTH> [IF entry is not within the reference period then goto ERR3_MONTH] <br> [ELSE goto AMOUNT] <br> <13,D,R> [goto AMOUNT] |
| 19 | CONTEXPX | AMOUNT | (What was the total amount of the (payment/contribution)./What is the monthly (payment/contribution).) <br> Description Month Amount <br> (CONTDESC) (CONTMO) (CONTEXPX) | <1-999999> [IF (CONTCODE = 100 and AMOUNT It 20 or gt 3000) OR <br> (CONTCODE $=110$ and AMOUNT It 55 or gt 3600) OR (CONTCODE $=120$ and AMOUNT It 40 or gt 8000) OR (CONTCODE $=130$ and AMOUNT It 5 or gt 1500) OR (CONTCODE $=140$ and AMOUNT It 5 or gt 1000) OR (CONTCODE $=150$ and AMOUNT It 10 or gt 1600) OR (CONTCODE $=160$ and AMOUNT It 5 or gt 650) OR (CONTCODE $=170$ and AMOUNT It 5 or gt 2300) OR (CONTCODE $=180$ and AMOUNT It 5 or gt 10000) THEN goto ERR1_AMOUNT] <br> [ELSEIF $\overline{\text { CONTCODE }}$ and the entry in AMOUNT |

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| :---: | :---: | :---: | :---: | :---: |
|  |  |  |  | for this record are equal to any records data on the pre-chart/input then goto ERR_DUP] <br> [ELSE goto MORE] <br> <D,R> [goto MORE] |
| 19 | CONTMORE | MORE | Did you make any other (payment/contribution). <br> Description Month Amount (CONTDESC) (CONTMO) (CONTEXPX) <br> 1. Yes <br> 2. No | $<1>$[IF Row number $=43$ then goto ERR_MAX] <br> [ELSE goto ITEM, next line in grid]$<2, \mathrm{D}, \mathrm{R}>\quad$ [goto ITEM, next line in grid] |
| 20 | GROCWEKX | GROCWEKX | Now I am going to ask about expenses for food, beverages and other items ^YOU_YRCU ^CU_havehas2 purchased since the first of $\wedge$ REF_MONTH. <br> What has been ^YOU_YRCU usual WEEKLY expense for grocery shopping? <br> Include grocery home delivery service fees and drinking water delivery fees. | $<0, \mathrm{D}, \mathrm{R}>$ [goto OTHSTOR] <br> $<1$-999> $[$ [IF Entry gt 300 then goto ERR1_GROCWEKX] <br>  $[$ ELSE OTHSTUFX] |
| 20 | OTHSTUFX | OTHSTUFX | About how much of this amount was for nonfood items, such as paper products, detergents, home cleaning supplies, pet foods, and alcoholic beverages? | ```<0-9999> [IF Entry gt 50 then goto ERR1_OTHSTUFX] [ELSEIF Entry gt GROCWEKX then goto CK_OTHSTUFX] [ELSE goto OTHSTOR] <D,R> [goto OTHSTOR]``` |
| 20 | OTHSTOR | OTHSTOR | Other than your regular grocery shopping already reported, have ^YOU_ANYMEM purchased any food or nonalcoholic beverages from places such as grocery stores, convenience stores, specialty stores, home delivery, or farmer's markets? <br> 1. Yes <br> 2. No | $<1>$ [goto OSTORWKX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto DINE_WKX] |
| 20 | OSTORWKX | OSTORWKX | What was your usual WEEKLY expense at these places? | ```<0-9999> [IF entry It 5 or gt 90 then goto ERR1_OSTORWKX] [ELSE goto DINE_WKX] <D,R> [goto DINE_WKX]``` |
| 20 | DINE_WKX | DINE_WKX | What has been ^YOU_YRCU usual WEEKLY expense for meals or snacks from restaurants, fast food places, cafeterias, carryouts or other such places? (Do not include meals purchased at school.) | ```<0-9999> [IF ENTRY It 10 or gt 120 then goto ERR1_DINEWKX] [ELSE goto ALCOHOL] <D,R> [goto ALCOHOL]``` |
| 20 | ALCOHOL | ALCOHOL | Since the first of ^REF_MONTH have ^YOU_ANYMEM purchased alcohol, including beer and wine? | $\begin{array}{lc} \hline<1> & \text { [goto ALC_HOMX] } \\ <2, \mathrm{D}, \mathrm{R}> & \text { [goto FREEFOOD] } \\ \hline \end{array}$ |

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|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 20 | ALC_HOMX | ALC_HOMX | What has been ^YOU_YRCU usual MONTHLY expense for alcohol, including beer and wine to be served at home? | $<0-9999>$ [IF Entry gt 150 then goto ERR1_ALCHOMX] <br> [ELSE goto ALC_OUTX]  |
|  |  |  |  | <D,R> [goto ALC_OUTX] |
| 20 | ALC_OUTX | ALC_OUTX | What has been your usual MONTHLY expense for alcohol, including beer and wine at restaurants, bars and recreational events? | $<0-9999>$ [IF Entry It 5 or gt 240 then goto ERR1_ALCOUTX] <br> [ELSE goto FREEFOOD] |
|  |  |  |  | <D,R> [goto FREEFOOD] |
| 20 | FREEFOOD | FREEFOOD | Have ^YOU_ANYMEM received any free food, beverages, or meals through public or private welfare agencies, including religious organizations? <br> (Do not include free meals in school or preschool programs) | <1,2,D,R> [goto MEALSPAY] |
|  |  |  | 1. Yes <br> 2. No |  |
| 20 | MEALSPAY | MEALSPAY | Have ^YOU_ANYMEM received any free meals at work as part of your pay? <br> 1. Yes <br> 2. No | $<1>$ [goto MLPAYWKX] <br> $<2, \mathrm{D}, \mathrm{R}>$ $[\mathrm{IF}$ any CU members (hh_mem=1 and membstat <br> does not equal 1) has AGE It 22 goto ANYMEALS]  <br>  $\left[\begin{array}{ll}\text { [ELSE goto Section } 20 B-\text { BSECT20B] }\end{array}\right.$ |
| 20 | MLPAYWKX | MLPAYWKX | About what was the WEEKLY dollar value of these meals? | ```<0-9999> [IF Entry It 5 or gt 125 then goto ERR1_MLPAYWKX] [ELSE goto MLPYQWKS] <D,R> [goto MLPYQWKS]``` |
| 20 | MLPYQWKS | MLPYQWKS | Since the first of ^REF_MONTH for how many weeks did members of your household receive these meals? | <1-13,D,R> [IF any CU members (hh_mem=1 and membstat does not equal 1) has AGE It 22 goto ANYMEALS] <br> [ELSE goto Section 20B - BSECT20B] |
| 20 | ANYMEALS | ANYMEALS | Since the first of ^REF_MONTH, not including (current month), have ^YOU_ANYMEM purchased any meals at school for preschool through high school age children? <br> 1. Yes <br> 2. No | $<1>$ [goto FBPERSN] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto Section 20B - BSECT20B] |
|  | FBPERSON | FBPERSON | What are the names of all household members who purchased meals at school? | $<1-30>$ [goto BSCHMEAL Block] <br> $<\mathrm{D}, \mathrm{R}>$ [goto Section 20B - BSECT20B] |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | * Enter line numbers for all that apply, separate with commas. <br> 1. Person 1 <br> 2. Person 2 <br> 3. Person 3 <br> 4. Person 4 <br> 5. Person 5 <br> 6. Person 6 <br> 7. Person 7 <br> 8. Person 8 <br> 9. Person 9 <br> 10. Person 10 <br> 11. Person 11 <br> 12. Person 12 <br> 13. Person 13 <br> 14. Person 14 <br> 15. Person 15 <br> 16. Person 16 <br> 17. Person 17 <br> 18. Person 18 <br> 19. Person 19 <br> 20. Person 20 <br> 21. Person 21 <br> 22. Person 22 <br> 23. Person 23 <br> 24. Person 24 <br> 25. Person 25 <br> 26. Person 26 <br> 27. Person 27 <br> 28. Person 28 <br> 29. Person 29 <br> 30. Person 30 |  |
| 20 | SCHMLWKX | SCHMLWKX | Since the first of ^REF_MONTH, not including (current month), what has been the usual WEEKLY expense for the meals ^NAME purchased at school? | ```<0-999> [IF Entry It 5 or gt 30 then goto ERR1_SCHMLWKX] [ELSE goto SHMLWKQ] <D,R> [goto SHMLWKQ]``` |
| 20 | SCHMLWKQ | SCHMLWKQ | How many weeks did ^NAME purchase meals? | <1-13,D,R> [goto SCHMLWKX for next person] [if no more persons goto Section 20B BSECT20B] |
| 20 | LNDROMAT | LNDROMAT | [2] 44 ? [F1] <br> Since the first of ^REF_MONTH, not including (current month) have ^YOU_ANYMEM had any expenses for self-service laundry machines? | $\begin{array}{ll} \hline<1> & \text { [goto LNDRYX] } \\ <2, \mathrm{D}, \mathrm{R}> & \text { [goto DRYCLEAN] } \end{array}$ |

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|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 20 | LNDRYX | LNDRYX | What was the total cost? | $\begin{gathered} <0-9999>\text { [IF Entry It } 5 \text { or gt } 260 \text { then goto ERR1_LNDRYX] } \\ \text { [ELSE goto OTHLNDRY] } \end{gathered}$ |
|  |  |  |  | <D,R> [goto OTHLNDRY] |
| 20 | OTHLNDRY | OTHLNDRY | Was any of this amount for items other than clothes, such as linens or drapes? | $<1>$ [goto OTHLNDRX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto DRYCLEAN] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 20 | OTHLNDRX | OTHLNDRX | How much? |  |
|  |  |  |  | <D,R> [goto DRYCLEAN] |
| 20 | DRYCLEAN | DRYCLEAN | [4 44 ? [F1] Have^YOU_ANYMEM had any expenses for dry cleaning or laundry service? | $<1>$ [goto DRYCLNX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto CIGARETT] |
|  |  |  | Have ^YOU_ANYMEM had any expenses for dry cleaning or laundry service? 1. Yes 2. No |  |
| 20 | DRYCLNX | DRYCLNX | What was the total cost? | <0-9999> [IF Entry lt 6 or gt 390 then goto ERR1_DRYCLNX] <br> [ELSE goto OTHDRCLN] |
|  |  |  |  | <D,R> [goto OTHDRCLN] |
| 20 | OTHDRCLN | OTHDRCLN | Was any of this amount for items other than clothes, such as linens, drapes, or rugs? | $\begin{array}{lc} <1> & \text { [goto OTHDCLNX] } \\ <2, \mathrm{D}, \mathrm{R}> & \text { [goto CIGARETT] } \end{array}$ |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 20 | OTHDCLNX | OTHDCLNX | How much? | <0-9999> [IF entry It 5 or gt 200 then goto ERR1_OTHDRCLNX] <br> [ELSEIF entry gt DRYCLNX then goto CK_OTHDCLNX] <br> [ELSE goto CIGARETT] |
|  |  |  |  | <D,R> [goto CIGARETT] |

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| 20 | CIGARETT | CIGARETT | Since the first of ^REF_MONTH, have ^YOU_ANYMEM purchased cigarettes? <br> 1. Yes <br> 2. No | $<1>$ [goto CIGARETX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto OTHTOBAC] |
| 20 | CIGARETX | CIGARETX | What is the usual WEEKLY expense for cigarettes? | ```<0-9999> [IF entry It 5 or gt 80 then goto ERR1_CIGARETX] [ELSE goto OTHTOBAC] <D,R> [goto OTHTOBAC]``` |
| 20 | OTHTOBAC | OTHTOBAC | [A] 44 [F1] <br> Have ^YOU_ANYMEM purchased other tobacco products such as cigars, pipe tobacco, or chewing tobacco? <br> 1. Yes <br> 2. No | $\begin{array}{ll} <1> & \text { [goto OTHTBACX] } \\ <2, \mathrm{D}, \mathrm{R}> & \text { [goto SALONS] } \end{array}$ |
| 20 | OTHTBACX | OTHTBACX | What is the usual WEEKLY expense? | ```<0-999> [IF entry It 5 or gt 80 then goto ERR1_OTHTBACX] [ELSE goto SALONS] <D,R> [goto SALONS]``` |
| 20 | SALONS | SALONS | $\text { EA } 44 \quad \text { ? [F1] }$ <br> Since the first of ^REF_MONTH, not including (current month) have ^YOU_ANYMEM had any expenses for haircutting, styling, attached hair pieces, manicures, massages or other salon services? <br> 1. Yes <br> 2. No | $<1>$ [goto SALONX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto WIGS] |
| 20 | SALONX | SALONX | What was the total expense for these services since the first of ^REF_MONTH, not including (current month)? | ```<0-9999> [IF entry \(=1-5\), or gt 300 then goto ERR1_SALONX] [ELSE goto WIGS] <D,R> [goto WIGS]``` |
| 20 | WIGS | WIGS | [A] 44 ? [F1] <br> Since the first of ^REF_MONTH, not including (current month) have ^YOU_ANYMEM had any expenses for removable hairpieces, wigs or toupees? <br> 1. Yes <br> 2. No | $\begin{aligned} & <1>\text { [goto WIGSX] } \\ & <2, \mathrm{D}, \mathrm{R}>\text { [goto SAFEDPST] } \end{aligned}$ |
| 20 | WIGSX | WIGSX | What was the total expense for these items since the first of ^REF_MONTH, not including (current month)? | $<0-9999>$ [IF entry $=1-5$, or gt 300 then goto ERR1_WIGSX] |

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|  |  |  |  | [ELSE goto SAFEDPST] |
| 20 | SAFEDPST | SAFEDPST | Have ^YOU_ANYMEM had any expenses for the rental of a safe deposit box located in a bank or similar financial institution? | $\begin{array}{lc} \hline<1> & \text { [goto SAFDPSTX] } \\ <2, \mathrm{D}, \mathrm{R}> & \text { [goto BANKSRVC] } \end{array}$ |
|  |  |  | 1. Yes <br> 2. No |  |
| 20 | SAFDPSTX | SAFDPSTX | What was the total rental expense for the safe deposit box since the first of ^REF_MONTH, not including (current month)? | $\begin{gathered} \text { <0-999> [IF entry gt } 100 \text { then goto ERR1_SAFEDPSTX] } \\ \text { [ELSE goto BANKSRVC] } \end{gathered}$ |
|  |  |  |  | <D,R> [goto BANKSRVC] |
| 20 | BANKSRVC | BANKSRVC | [14 44 ? [F1] | $\begin{array}{ll} \hline<1> & \text { [goto BANKMOX] } \\ <2, \mathrm{D}, \mathrm{R}> & \text { [goto TXLIMSRV] } \end{array}$ |
|  |  |  | Have ^YOU_ANYMEM paid any charges or fees for bank services such as ATM fees or account service charges from financial institutions such as banks, credit unions, and finance companies? <br> 1. Yes <br> 2. No |  |
|  |  |  |  |  |
| 20 | BANKMOX | BANKMOX | What is the usual MONTHLY charge? | <0-99999> [IF entry It 5 or gt 50 then goto ERR1_BANKMOX] <br> [ELSE goto TXLIMSRV] |
|  |  |  |  | <D,R> [goto TXLIMSRV] |
| 20 | TXLIMSRV | TXLIMSRV | Since the first of ^REF_MONTH not including (current month), have ${ }^{\wedge}$ YOU_ANYMEM had expenses for taxis or limousine service? Do not include expenses entirely reimbursed for business purposes or expenses incurred on a trip. <br> 1. Yes <br> 2. No | $<1>$ [goto TXLIMX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto MASSTRAN] |
|  |  |  |  |  |
| 20 | TXLIMX | TXLIMX | What was the total expense? | $<0-9999>$ $[$ [ELSE goto MASSTR It 5 or gt 520 then goto ERR1_TXLIMX] |
|  |  |  |  | <D,R> [goto MASSTRAN] |
| 20 | MASSTRAN | MASSTRAN | Do ^YOU_ANYMEM use mass transportation services such as a bus, subway, mini-bus or train? Include all commuter services. Do not include expenses covered by employer-provided transit subsidies. | $<1>$ [goto TRANWRKX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto S20B_END] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |

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| 20 | TRANWRKX | TRANWRKX | What is the usual MONTHLY cost to use mass transit to go to Work? | $\begin{aligned} & <1-9999>\text { [IF entry gt } 245 \text { then goto ERR1_TRANWRKX] } \\ & \quad \text { [ELSE goto TRANSUB] } \\ & <0, \mathrm{D}, \mathrm{R}>\text { [goto TRANSCHX] } \end{aligned}$ |
| 20 | TRANSUB | TRANSUB | Did you receive a transit subsidy? <br> 1. Yes <br> 2. No | $<1>$ [goto TRANSUBX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto TRANSCHX] |
| 20 | TRANSUBX | TRANSUBX | What is the usual monthly amount? | ```<0-9999> [IF entry It 5 or gt 200 then goto ERR1_TRANSUBX] [ELSE goto TRANSCHX] <D,R> [goto TRANSCHX]``` |
| 20 | TRANSCHX | TRANSCHX | What is the usual MONTHLY cost to use mass transit to go to School? |  |
| 20 | TRANOTHX | TRANOTHX | What is the usual MONTHLY cost to use mass transit to go to Other places? | ```<0-9999> [IF entry gt 100 then goto ERR1_TRANOTHX] [ELSE goto S20B_END] <D,R> [goto S20B_END]``` |
|  | FN2_INTRO | FN2_INTRO | [4 45 <br> Now I am going to ask about credit balances. <br> 1. Enter 1 to Continue | <1> [goto BTableA1.Brow.ITEM] |
| 21 | FN2_ITEM | ITEM | [A] 45 ? [F1] <br> On the first of (current month), did ^YOU_ANYMEM owe any money to any of the following? Do not include mortgages, home equity loans, automobile loans, or business related loans. | <1-7> [goto CREDNAM1] <br> $<99>$ [goto S21A1_END] <br> $<888>$ [goto ITEM - next line of grid] <br>  [If no more grid lines goto S21A1_END] |

1. Gasoline credit cards, such as Shell or Exxon
2. Store credit cards, such as those issued by department, specialty, electronics, or sporting goods stores
3. Major credit cards, such as VISA, Master Card, American Express, or other revolving credit accounts
4. Store installment credit accounts
5. Financial institutions, such as banks, brokerages, savings and loans, credit unions, or insurance companies. Do not include insurance premium payments
6. Doctors, dentists, hospitals or other medical practitioners for expenses not covered by insurance
7. Other credit, such as school loans, personal loans or loans from retirement plans
8. None/No more entries

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| 21 | CREDNAM5 | CREDNAM5 | What is the name of the (description) to which you owed money? | <30 characters> [goto AMOUNT] |
| 21 | CREDITX5 | AMOUNT | What was the total amount owed on the first of (current month)? | <1-999999> [If (CREDITR5 $=110$ and AMOUNT It 10 or gt 13000) <br> or (CREDITR5 $=120$ and AMOUNT It 10 or gt 5000) <br> or (CREDITR5 $=130$ and AMOUNT It 10 or gt 13000) <br> or (CREDITR5 $=200$ and AMOUNT It 10 or gt 5000) <br> or (CREDITR5 $=510$ and AMOUNT It 40 or gt 35000) <br> or (CREDITR5 $=700$ and AMOUNT It 20 or gt 30000) <br> or (CREDITR5 $=800$ and AMOUNT It 10 or gt 62000) <br> then goto ERR1_AMOUNT] <br> [ELSE goto OWEMONEY] |
|  |  |  |  | <D,R> [goto OWEMONEY] |
| 21 | OWEMONEY | OWEMONEY | What was the total amount owed on the first day of (current month) (last year)? | <0-999999> [IF (CREDITR5 = 110 and OWEMONEY It 5 or gt 12000) <br> or (CREDITR5 $=120$ and OWEMONEY It 5 or gt 5000) <br> or (CREDITR5 $=130$ and OWEMONEY It 5 or gt 12000) <br> or (CREDITR5 = 200 and OWEMONEY It 5 or gt 5000) <br> or (CREDITR5 $=510$ and OWEMONEY It 5 or gt 30000) <br> or (CREDITR5 $=700$ and OWEMONEY It 5 or gt 15000) <br> or (CREDITR5 $=800$ and OWEMONEY It 5 or gt 67000) <br> or (from ITEM, SCREEN 2 and OWEMONEY $=0$ ) <br> then goto ERR1_OWEMONEY] <br> [ELSE goto MORE] |
|  |  |  |  | <D,R> [goto MORE] |
| 21 | CREDMOR5 | MORE | Did ^YOU_ANYMEM owe any money to any other (description) (on the first of (current month)/a year ago that you don't owe money to today)? | <1> [IF ROW number = 24 then goto ERR_MAX] <br> [ELSE goto ITEM next line on the grid] <br> <2,D,R> [IF ROW number $=24$ then goto S21A2_END] [ELSE goto ITEM next line on the grid] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 21 | S21INTROB | S21INTROB | Now I'm going to ask about finance charges, interest charges and late fees. | <1> [goto GASCARD] |
|  |  |  | 1. Enter 1 to Continue |  |
| 21 | GASCARD | GASCARD | During the past twelve months have ^YOU_ANYMEM paid any finance charges, interest charges, or late fees for any of the following? Do not include those for mortgages, home equity loans, automobile loans, or business related loans. Do not include annual fees. <br> . . . Gasoline credit cards, such as Shell or Exxon? | $<1>$ [goto GASCARDX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto STRCARD] |

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|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 21 | GASCARDX | GASCARDX | What was the total amount paid for finance, interest, and late charges for gasoline credit cards? | $\begin{aligned} & \text { <1-999999> [IF GASCARDX It } 5 \text { or gt } 2400 \text { goto } \\ & \text { ERR1_GASCARDX] } \\ & \quad[\text { ELSE goto STRCARD] } \end{aligned}$ |
|  |  |  |  | <D,R> [goto STRCARD] |
| 21 | STRCARD | STRCARD | During the past twelve months have ^YOU_ANYMEM paid any finance charges, interest charges, or late fees for any of the following? Do not include those for mortgages, home equity loans, automobile loans, or business related loans. Do not include annual fees. <br> ... Store credit cards, such as those issued by department, specialty, electronics, or sporting goods stores? | $<1>$ [goto STRCARDX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto MAJCARD] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 21 | STRCARDX | STRCARDX | What was the total amount paid for finance, interest, and late charges for store credit cards? | $<1$-999999> [IF STRCARDX It 5 or gt 2400 goto ERR1_STRCARDX] <br> [ELSE goto MAJCARD] |
|  |  |  |  | <D,R> [goto MAJCARD] |
| 21 | MAJCARD | MAJCARD | During the past twelve months have ^YOU_ANYMEM paid any finance charges, interest charges, or late fees for any of the following? Do not include those for mortgages, home equity loans, automobile loans, or business related loans. Do not include annual fees. <br> . . . Major credit cards, such as VISA, Master Card, American Express, or other revolving credit accounts? | $\begin{array}{lc} \hline<1> & \text { [goto MAJCARDX] } \\ <2, \mathrm{D}, \mathrm{R}> & \text { [goto INSTLFEE] } \end{array}$ |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 21 | MAJCARDX | MAJCARDX | What was the total amount paid for finance, interest, and late charges for major credit cards? | <1-999999> [IF MAJCARDX It 5 or gt 4000 goto ERR1_MAJCARDX] <br> [ELSE goto INSTLFEE] |
|  |  |  |  | <D,R> [goto INSTLFEE] |
| 21 | INSTLFEE | INSTLFEE | During the past twelve months have ^YOU_ANYMEM paid any finance charges, interest charges, or late fees for any of the following? Do not include those for mortgages, home equity loans, automobile loans, or business related | $\begin{array}{ll}<1> & \text { [goto INSTALLX] } \\ <2 \text { D R }> \\ \text { [goto FININST] }\end{array}$ |

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| loans. Do not include annual fees. <br> . . . Store installment credit accounts? |  |  |  |  |
| $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |  |  |  |
| 21 | INSTALLX | INSTALLX | What was the total amount paid for finance, interest, and late charges for store installment credit accounts? | <1-999999> [IF INSTALLX It 5 or gt 1300 then goto ERR1_INSTALLX] <br> [ELSE goto FININST] |
|  |  |  |  | <D,R> [goto FININST] |
| 21 | FININST | FININST | During the past twelve months have ^YOU_ANYMEM paid any finance charges, interest charges, or late fees for any of the following? Do not include those for mortgages, home equity loans, automobile loans, or business related loans. Do not include annual fees. <br> ... Financial institutions, such as banks, brokerages, savings and loans, credit unions, or insurance companies? Do not include mortgages, home equity loans, car loans or insurance premium payments. | $<1>$ [goto FININSTX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto MEDICAL] |
| $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |  |  |  |
| 21 | FININSTX | FININSTX | What was the total amount paid for finance, interest, and late charges to financial institutions? | <1-999999> [IF FININSTX It 5 or gt 2600 goto ERR1_FININSTX] <br> [ELSE goto MEDICAL] |
|  |  |  |  | <D,R> [goto MEDICAL] |
| 21 | MEDICAL | MEDICAL | During the past twelve months have ^YOU_ANYMEM paid any finance charges, interest charges, or late fees for any of the following? Do not include those for mortgages, home equity loans, automobile loans, or business related loans. Do not include annual fees. <br> ... Doctors, dentists, hospitals, or other medical practitioners for expenses not covered by insurance? | $<1>$ [goto MEDICALX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto OTHER] |
| $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |  |  |  |
| 21 | MEDICALX | MEDICALX | What was the total amount paid for finance, interest, and late charges for doctors, dentists, hospitals, or other medical practitioners for expenses not covered by insurance? | <1-999999> [IF MEDICALX It 5 or gt 3000 goto ERR1_MEDICALX] <br> [ELSE goto OTHER] |

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|  |  |  |  | <D,R> [goto OTHER] |
| 21 | OTHER | OTHER | During the past twelve months have ^YOU_ANYMEM paid any finance charges, interest charges, or late fees for any of the following? Do not include those for mortgages, home equity loans, automobile loans, or business related loans. Do not include annual fees. <br> .. . Other credit, such as school loans, personal loans or loans from retirement plans? | $<1>$ [goto PDOTHERX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto S21B_END] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 21 | PDOTHERX | PDOTHERX | What was the total amount paid for finance, interest, and late charges for other credit sources? | <1-999999> [IF PDOTHERX It 5 or gt 4500 goto ERR1_PDOTHERX] <br> [ELSE goto S21B_END] |
|  |  |  |  | <D,R> [goto S21B_END] |
| 22 | ANYWORK | ANYWORK | Since the first of ^REF_MONTH, did (You/NAME) earn any income from wages or salary? | $<1>$ [goto 22A_INTRO] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto S22A_CHECK] |
|  |  |  | 1. Yes 2. No |  |
|  | S22A_INTRO | S22A_INTRO | The next few questions are about income. We know people aren't used to discussing their income, but please be assured that, like all other information you have provided, these answers will be kept strictly confidential. <br> 1. Enter 1 to Continue | <1> [goto INCWEEKQ] |
| 22 | INCWEEKQ | INCWEEKQ | In the past 12 months, including paid vacation and sick leave, how many weeks did [fill: you/NAME] work? <br> If household member did not work, enter zero. | $<0>$ [goto INCNONWK] <br> $<1-52, \mathrm{D}, \mathrm{R}>$ [goto INC_HRSQ] |
| 22 | INC_HRSQ | INC_HRSQ | In the weeks that (You/NAME) worked, how many hours did (you/he/she) usually work per week? | <1-168,D,R> [goto OCCUCODE] |
| 22 | OCCUCODE | OCCUCODE | [14 46 ? [F1] | <1-18,D,R> [goto INCOMEY] |
|  |  |  | Which of the following categories best describes the job in which (You/NAME) received the most earnings during the last 12 months? |  |
|  |  |  | 1. Administrator, manager <br> 2. Teacher <br> 3. Professional <br> 4. Administrative support including clerical <br> 5. Sales, retail |  |

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|  |  |  | 6. Sales, business goods and services <br> 7. Techinician <br> 8. Protective service <br> 9. Private household service <br> 10. Other service <br> 11. Machine operator, assembler, inspector <br> 12. Transportation operator <br> 13. Handler, helper, laborer <br> 14. Mechanic, repairer, precision production <br> 15. Construction, mining <br> 16. Farming <br> 17. Forestry, fishing, groundskeeping <br> 18. Armed Forces |  |
| 22 | INCOMEY | INCOMEY | (Were/Was) (You/NAME): | $\substack{<1-4,6, \mathrm{D}, \mathrm{R}>\\ <5>}$ [goto SALARYST] <br> [goto INCORP]  |
|  |  |  | 1. An employee of a PRIVATE company, business, or individual working for wages or salary? <br> 2. A Federal government employee? <br> 3. A State government employee? <br> 4. A local government employee? <br> 5. Self-employed ^YourHisHer OWN business, partnership, professional practice, or farm? <br> 6. Working WITHOUT PAY in a family business or farm? |  |
| 22 | INCORP | INCORP | Is (your/NAME's) business incorporated? | <1,2 D,R> [goto SALARYST] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 22 | INCNONWK | INCNONWK | What was the main reason (You/NAME) did not work during the last 12 months? (Were/Was) (you/he/she) - | $<1-5, \mathrm{D}, \mathrm{R}>$ [goto SALARYST] <br> $<6>$ [goto INCOTH] |
|  |  |  | 1. Retired? <br> 2. Taking care of home/family? <br> 3. Going to school? <br> 4. III, disabled, unable to work? <br> 5. Unable to find work? <br> 6. Doing something else? Specify |  |
| 22 | INCOTH | INCOTH | * Specify: | <30 characters> [goto SALARYST] |
| 22 | SALARYST | SALARYST | During the last 12 months, did (You/NAME) receive any money in wages or salary? Include all bonuses and overtime pay, salaries, commissions, tips, allowances, Armed Forces pay, severance | $<1>$ [goto SALARYX]  <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto NONFARM] |

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|  |  |  | pay, teaching fellowships, etc. |  |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 22 | SALARYX | SALARYX | During the last 12 months, how much did (You/NAME) receive in wages and salaries for ALL JOBS before any deductions? | <1-99999999> [IF SALARYX It 500 or gt 116249 goto ERR1_SALARYX] [ELSE goto GROSPAYX] |
|  |  |  |  | <D,R> [goto SALARYB] |
| 22 | SALARYB | SALARYB | [147 | <1-11,D,R> [goto GROSPAYX] |
|  |  |  | Could you tell me which range on CARD A best reflects (your/NAME's) total wages and salaries for ALL JOBS during the last 12 months? <br> 1. $\$ 0-\$ 4,999$ <br> 2. $\$ 5,000-\$ 9,999$ <br> 3. $\$ 10,000-\$ 14,999$ <br> 4. $\$ 15,000-\$ 19,999$ <br> 5. $\$ 20,000-\$ 29,999$ <br> 6. $\$ 30,000-\$ 39,999$ <br> 7. \$40,000-\$49,999 <br> 8. $\$ 50,000-\$ 69,999$ <br> 9. \$70,000-\$89,999 <br> 10. \$90,000-\$119,999 <br> 11. $\$ 120,000$ and over |  |
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| 22 | GROSPAYX | GROSPAYX | What was the amount of (your/NAME's) last pay before any deductions? | <1-99999999,D,R> [goto PAYPERD] |
| 22 | PAYPERD | PAYPERD | What period of time did this cover? | <1> [IF GROSPAYX It 50 or gt 1635 goto ERR1_PAYPERD] <br> [ELSE goto FEDTAX] |
|  |  |  | 1. One week | <2> [IF GROSPAYX It 120 or gt 4800 goto |
|  |  |  | 2. Two weeks | ERR1_PAYPERD] |
|  |  |  | 3. Month 4. Quarter | [ELSE goto FEDTAX] |
|  |  |  | 5. Year | <3> [IF GROSPAYX It 100 or gt 12000 goto |
|  |  |  | 6. Twice a month | ERR1_PAYPERD] |
|  |  |  | 7. Other | [ELSE goto FEDTAX] |
|  |  |  |  | <4> [IF GROSPAYX It 51 or gt 14583 goto |

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|  |  |  |  | ERR1_PAYPERD] [ELSE goto FEDTAX] |
|  |  |  |  | <5> [IF GROSPAYX It 250 or gt 155000 goto ERR1_PAYPERD] <br> [ĒLSE goto FEDTAX] |
|  |  |  |  | <6> [IF GROSPAYX It 15 or gt 12838 goto ERR1_PAYPERD] <br> [ELSE goto FEDTAX] |
|  |  |  |  | <7> [IF GROSPAYX It 200 or gt 10000 goto ERR1_PAYPERD] <br> [ELSE goto PAYPRDOT] |
|  |  |  |  | <D,R> [IF GROSPAYX It 8 or gt 200000 goto ERR1_PAYPERD] <br> [ELSE goto FEDTAX] |
| 22 | PAYPRDOT | PAYPRDOT | - Specify: | <30 characters> [goto FEDTAX] |
| 22 | FEDTAX | FEDTAX | Was there any money deducted from (your/NAME's) pay for Federal income tax? | $\begin{array}{lc} \hline<1> & \text { [goto AMTFED] } \\ <2, \mathrm{D}, \mathrm{R}> & \text { [goto SLTAX] } \end{array}$ |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 22 | AMTFED | AMTFED | How much? | <1-99999999> [IF PAYPERD = D,R and (AMTFED It 5 or gt 30000) OR PAYYPERD $=1$ and (AMTFED It 5 or gt 445) OR PAYPERD $=2$ and (AMTFED It 9 or gt 1062) OR PAYPERD $=3$ and (AMTFED It 15 or gt 3500) OR PAYPERD $=4$ and (AMTFED It 15 or gt 4969) OR PAYPERD $=5$ and (AMTFED It 15 or gt 70000) OR PAYPERD $=6$ and (AMTFED It 5 or gt 5500) OR PAYPERD $=7$ and (AMTFED It 12 or gt 7000) goto ERR1_AMTFED] <br> [ELSE goto SLTAX] |
|  |  |  |  | <D,R> [goto SLTAX] |
| 22 | SLTAX | SLTAX | Was there any money deducted from (your/NAME's) pay for - | $<1>$ [goto SLTAXX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto PRIVPENS] |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 22 | SLTAXX | SLTAXX | How much? | <1-99999999> [If PAYPERD = D or R and (SLTAXX It 5 or gt 15000) OR PAYPERD $=1$ and (SLTAXX it 5 or gt 140) OR PAYPERD $=2$ and (SLTAXX It 5 or gt 326) OR PAYPERD = 3 and (SLTAXX It 5 or gt 1000) OR PAYPERD $=4$ and (SLTAXX It 5 or gt 1186) OR PAYPERD $=5$ and (SLTAXX It 5 or gt 15000) OR PAYPERD $=6$ and (SLTAXX It 5 or gt 1500) OR PAYPERD $=7$ and (SLTAXX It 5 or gt 481)] then goto ERR1_SLTAXX] <br> [ELSE goto PRIVPENS] |
|  |  |  |  | <D,R> [goto PRIVPENS] |
| 22 | PRIVPENS | PRIVPENS | Was there any money deducted from (your/NAME's) pay for Private pension fund? | $<1>$ [goto PRIVPENX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto GOVRET] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 22 | PRIVPENX | PRIVPENX | How much? | $\begin{aligned} & \text { <1-99999999> [IF PAYPERD = D or R and (PRIVPENX It } 5 \\ & \text { or gt 147000) OR } \\ & \text { PAYPERD }=1 \text { and (PRIVPENX It } 5 \text { or gt 275) OR } \\ & \text { PAYPERD }=2 \text { and (PRIVPENX It } 8 \text { or gt 644) OR } \\ & \text { PAYPERD }=3 \text { and (PRIVPENX It } 32 \text { or gt 6000) OR } \\ & \text { PAYPERD }=4 \text { and (PRIVPENX It } 5 \text { or gt 4500) OR } \\ & \text { PAYPERD }=5 \text { and (PRIVPENX It } 7 \text { or gt 20000) OR } \\ & \text { PAYPERD }=6 \text { and (PRIVPENX It } 30 \text { or gt 1000) OR } \\ & \text { PAYPERD }=7 \text { and (PRIVPENX It } 12 \text { or gt 3000) } \\ & \text { then goto ERR1_PRIVPENX] } \\ & \text { [ELSE goto GOVRET] } \end{aligned}$ |
|  |  |  |  | <D,R> [goto GOVRET] |
| 22 | GOVRET | GOVRET | Was there any money deducted from (your/NAME's) pay for Government retirement? | $<1>$ [goto GOVRETX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto RRRDED] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 22 | GOVRETX | GOVRETX | How much? | <1-99999999> [IF GOVRETX It 5 or gt 590 goto |

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
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|  |  |  |  | $\begin{aligned} & \text { ERR1_GOVRETX] } \\ & \quad[\text { ELSE goto RRRDED] } \end{aligned}$ |
|  |  |  |  | <D,R> [goto RRRDED] |
| 22 | RRRDED | RRRDED | Was there any money deducted from (your/NAME's) pay for Railroad retirement? | $<1>$ [goto RRRDEDX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto SSDED] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2 No } \end{aligned}$ |  |
| 22 | RRRDEDX | RRRDEDX | How much? | ```<1-99999999> [IF RRRDEDX It 5 or gt 444 goto ERR1_RRRDEDX] [ELSE goto SSDED]``` |
|  |  |  |  | <D,R> [goto SSDED] |
| 22 | SSDED | SSDED | Social Security including Medicare? | $<1>$ [goto MEDICOV] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto SSNORM] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 22 | SSNORM | SSNORM | Are Social Security payments NORMALLY deducted from (your/NAME's) pay? | $\begin{array}{ll}<1> & \text { [goto MEDICOV] } \\ <2, \mathrm{D}, \mathrm{R}> & \text { [goto EMPLCONT] }\end{array}$ |
|  |  |  | 1. Yes <br> 2. No |  |
| 22 | MEDICOV | MEDICOV | Does the money deducted for Social Security cover only the Medicare portion of Social Security? | <1,2,D,R> [goto EMPLCONT] |
|  |  |  | 1. Yes 2. No |  |
| 22 | EMPLCONT | EMPLCONT | Other than Social Security, did any employer or union contribute to (your/NAME's) pension or retirement plan in the last 12 months? | <1,2,D,R> [goto NONFARM] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
| 22 | NONFARM | NONFARM | During the last 12 months, did (You/NAME) have any income or loss from (your/NAME's) own nonfarm business, partnership, or professional practice? | $<1>$ [goto NONFARMX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto FARMINC] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 22 | NONFARMX | NONFARMX | What was the amount of income or loss after expenses? | <0> [goto FARMINC] |
|  |  |  |  | <1-99999999> [IF NONFARMX It 5 or gt 200000 goto <br> ERR1_NONFARMX] <br> [ELSE goto NFRMLOSS] |
|  |  |  |  | <D,R> [goto NONFARMB] |
| 22 | NFRMLOSS | NFRMLOSS | Was this an income or loss? | <1,2,D,R> [goto FARMINC] |
|  |  |  | 1. Income <br> 2. Loss |  |
| 22 | NONFARMB | NONFARMB | [4] 47 | <0-11,D,R> [goto FARMINC] |
|  |  |  | Could you tell me which range on CARD A best reflects (your/NAME's) income or loss from (your/NAME's) own nonfarm business, partnership or professional practice during the last $\mathbf{1 2}$ months? |  |
|  |  |  | 0. Loss <br> 1. $\$ 0-\$ 4,999$ <br> 2. $\$ 5,000-\$ 9,999$ <br> 3. $\$ 10,000-\$ 14,999$ <br> 4. \$15,000-\$19,999 <br> 5. \$20,000-\$29,999 <br> 6. $\$ 30,000-\$ 39,999$ <br> 7. \$40,000-\$49,999 <br> 8. \$50,000-\$69,999 <br> 9. \$70,000-\$89,999 <br> 10. \$90,000-\$119,000 <br> 11. $\$ 120,000$ and over |  |
| 22 | FARMINC | FARMINC | During the last 12 months, did (You/NAME) have any income or loss from (your/NAME's) own farm? | $<1>$ [goto FARMINCX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto INDRETAC] |

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
| 2. No |  |  |  |  |
| 22 | FARMINCX | FARMINCX | What was the amount of income or loss after expenses? | <0> [goto INDRETAC] |
|  |  |  |  | <1-99999999> [IF FARMINCX It 5 or gt 108000 goto ERR1_FARMINCX] [ELSE goto FARMLOSS] |
|  |  |  |  | <D,R> [goto FARMINCB] |
| 22 | FARMLOSS | FARMLOSS | Was this an income or loss? | <1,2, $\mathrm{D}, \mathrm{R}>$ [goto INDRETAC] |
|  |  |  | 1. Income <br> 2. Loss |  |
| 22 | FARMINCB | FARMINCB | [4] 47 | <0-11,D,R> [goto INDRETAC] |
|  |  |  | Could you tell me which range on CARD A best reflects (your/NAME's) income or loss from (your/NAME own farm during the last 12 months? |  |
|  |  |  | 0. Loss <br> 1. \$0-\$4,999 <br> 2. \$5,000-\$9,999 <br> 3. $\$ 10,000-\$ 14,999$ <br> 4. $\$ 15,000-\$ 19,999$ <br> 5. \$20,000-\$29,999 <br> 6. $\$ 30,000-\$ 39,999$ <br> 7. $\$ 40,000-\$ 49,999$ <br> 8. $\$ 50,000-\$ 69,999$ <br> 9. $\$ 70,000-\$ 89,999$ <br> 10. \$90,000-\$119,000 <br> 11. $\$ 120,000$ and over |  |
| 22 | INDRETAC | INDRETAC | During the last 12 months, did (You/NAME) place any money in a retirement plan such as an Individual Retirement Account (IRA) or Keogh? Do not include rollovers. | $<1>$ [goto INDRETX] <br> $<2, \mathrm{D}, \mathrm{R}>$ $[$ goto SOCSECIN] |


|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| :---: | :---: | :---: | :---: | :---: |
| 22 | INDRETX | INDRETX | How much? | <1-99999999> [IF INDRETX It 75 or gt 18000 goto ERR1_INDRETX] <br> [ELSE goto SOCSECIN] |

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  |  | <D,R> [goto SOCSECIN] |
| 22 | SOCSECIN | SOCSECIN | During the | <1,2,D,R> [got |


|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| :---: | :---: | :---: | :---: | :---: |
| 22 | RRRETINC | RRRETINC | During the last 12 months, did (You/NAME) receive, from the US Government, any money from Railroad Retirement checks? | ```<1,2,D,R> [IF SOCSECIN = 1 or RRRETINC = 1 goto RRRETIRX] [ELSE goto SUPPLINC]``` |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 22 | RRRETIRX | RRRETIRX | What was the amount of the last Social Security or Railroad Retirement payment received? | <1-99999999> [IF RRRETIRX It 139 or gt 6000, goto ERR1_RRRETIRX] <br> [ELSE goto INCMEDCR] |
|  |  |  |  | <D,R> [goto RRRETIRB] |
| 22 | RRRETIRB | RRRETIRB | [448 | <1-10, D, R> [goto INCMEDCR] |

Could you tell me which range on CARD B best reflects the amount of (your/NAME's) last Social Security or Railroad Retirement payment during the last 12 months?


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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
| 2. No |  |  |  |  |
| 22 | SS_RRQ | SS_RRQ | During the last 12 months, how many Social Security or Railroad Retirement payments did (You/NAME) receive? | $<1-52, D, R>$ [ELS SS_RRQ gt 12, goto ERR1_SSRRQ] [ELSE goto SUPPLINC] |
| Supplemental Security Income (SSI) payments from the US Government? |  |  |  |  |
| $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |  |  |  |
| 22 | SLSSI | SLSSI | During the last 12 months, did (You/NAME) receive any - <br> Supplemental Security Income (SSI) payments from the STATE or LOCAL government? | <1,2,D,R> [IF SUPPLINC = 1 or SLSSI = 1 goto SSIX] [ELSE goto S22A_CHECK] |
| $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |  |  |  |
| 22 | SSIX | SSIX | During the last 12 months, how much did (You/NAME) receive in Supplemental Security Income checks from ALL government sources? | <1-99999999> [IF SSIX It 5 or gt 15180 goto ERR1_SSIX] [ELSE goto S22A_CHECK] |
|  |  |  |  | <D,R> [goto SSIB] |
| 22 | SSIB | SSIB | El 49 | <1-12, D, R> [goto S22A_CHECK] |
| Could you tell me which range on CARD C best reflects the amount ^YourName received in Supplemental Security income from all government sources during the last 12 months? |  |  |  |  |
| 1. \$0-\$999 <br> 2. $\$ 1,000-\$ 1,999$ <br> 3. $\$ 2,000-\$ 2,999$ <br> 4. $\$ 3,000-\$ 3,999$ <br> 5. $\$ 4,000-\$ 4,999$ <br> 6. $\$ 5,000-\$ 9,999$ <br> 7. $\$ 10,000-\$ 14,999$ <br> 8. $\$ 15,000-\$ 19,999$ <br> 9. $\$ 20,000-\$ 29,999$ <br> 10. $\$ 30,000-\$ 39,999$ <br> 11. $\$ 40,000-\$ 49,999$ <br> 12. $\$ 50,000$ and over |  |  |  |  |
| 22 | INTEARN | INTEARN | Up until this point, we have discussed earnings for individual members. Now, I would like to talk to you about | <1> [goto INTEARNX] |

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | your household as a whole. | <2,D,R> [goto FINANING] |
|  |  |  | During the last 12 months, did ^ YOU_ANYMEM earn income from any of the following- |  |
|  |  |  | Interest on bank accounts, money market funds, CD's, or bonds? |  |
|  |  |  | 1. Yes 2. No |  |
| 22 | INTEARNX | INTEARNX | What was the total amount earned by all household members? | $\begin{aligned} & \text { <1-99999999> [IF INTEARNX gt } 18000 \text { goto } \\ & \text { ERR1_INTEARNX] } \\ & \quad[\text { ELSE goto FINANING] } \end{aligned}$ |
|  |  |  |  | <D,R> [goto INTERNB] |
| 22 | INTERNB | INTERNB | [14 49 | <1-12,D,R> [goto FINANING] |

Could you tell me which range on CARD C best reflects the total amount of interest earned by all household members during the last 12 months?

1. $\$ 0-\$ 999$
2. $\$ 1,000-\$ 1,999$
3. $\$ 2,000-\$ 2,999$
. $\$ 3,000-\$ 3,999$
4. $\$ 4,000-\$ 4,999$
5. $\$ 5,000-\$ 9,999$
6. $\$ 10,000-\$ 14,999$
7. $\$ 15,000-\$ 19,999$
8. $\$ 20,000-\$ 29,999$
9. \$30,000-\$39,999
10. $\$ 40,000-\$ 49,999$

REGULAR income from dividends, trusts, estates or royalties? <2,D,R> [goto PENSIONS]

|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| :---: | :---: | :---: | :---: | :---: |
| 22 | FININCX | FININCX | What was the total amount earned by all household members? | $\begin{aligned} & \text { <1-99999999> [IF FININCX It } 11 \text { or gt } 57926 \text { goto } \\ & \text { ERR1_FININCX] } \end{aligned}$ |

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  |  | [ELSE goto PENSIONS] |
|  |  |  |  | <D,R> [goto FININCB] |
| 22 | FININCB | FININCB | [44 49 | <1-12, D, R> [goto PENSIONS] |
|  |  |  | Could you tell me which range on CARD C best reflects the total amount of income from dividends, trusts, estates or royalties during the last 12 months? |  |
|  |  |  | 1. \$0-\$999 <br> 2. \$1,000-\$1,999 <br> 3. \$2,000-\$2,999 <br> 4. \$3,000-\$3,999 <br> 5. \$4,000-\$4,999 <br> 6. \$5,000-\$9,999 <br> 7. \$10,000-\$14,999 <br> 8. $\$ 15,000-\$ 19,999$ <br> 9. $\$ 20,000-\$ 29,999$ <br> 10. \$30,000-\$39,999 <br> 11. \$40,000-\$49,999 <br> 12. \$50,000 and over |  |
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|  |  |  |  |  |
| 22 | PENSIONS | PENSIONS | During the last 12 months, did ^YOU_ANYMEM receive income from - | $<1>$ [goto PENSIONX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto UNEMPCMP] |
|  |  |  | Retirement, disability and survivor pensions or annuities from private companies, military, Government, IRA or Keogh? <br> 1. Yes <br> 2. No |  |
|  |  |  |  |  |
| 22 | PENSIONX | PENSIONX | What was the total amount received by all household members? | <1-99999999> [IF PENSIONX It 250 or gt 6000 goto ERR1_PENSIONX] <br> [ELSE goto UNEMPCMP] |
|  |  |  |  | <D,R> [goto PENSIONB] |
| 22 | PENSIONB | PENSIONB | [14 49 | <1-12,D,R> [goto UNEMPCMP] |
|  |  |  | Could you tell me which range on CARD C best reflects the total amount of retirement pensions and annuities during the last 12 months? |  |

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| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 2. \$1,000-\$1,999 |  |
|  |  |  | 3. \$2,000-\$2,999 |  |
|  |  |  | 4. \$3,000-\$3,999 |  |
|  |  |  | 5. \$4,000-\$4,999 |  |
|  |  |  | 6. \$5,000-\$9,999 |  |
|  |  |  | 7. \$10,000-\$14,999 |  |
|  |  |  | 8. \$15,000-\$19,999 |  |
|  |  |  | 9. \$20,000-\$29,999 |  |
|  |  |  | 10. \$30,000-\$39,999 |  |
|  |  |  | 11. \$40,000-\$49,999 |  |
|  |  |  | 12. \$50,000 and over |  |
| 22 | UNEMPCMP | UNEMPCMP | During the last 12 months, did ^YOU_ANYMEM receive any income from - | $<1>$ [goto UNEMPLX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto COMPENSN] |



Could you tell me which range on CARD C best reflects the total amount received in unemployment
compensation during the last 12 months?

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | Worker's compensation or veteran's benefits including the GI Bill but not including military retirement? | <2,D,R> [goto FOODSMP] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 22 | COMPENSX | COMPENSX | What was the total amount received by all household members? | <1-99999999> [IF COMPENSX It 150 or gt 29812 goto ERR1_COMPENSX] <br> [ELSE goto FOODSMP] |
|  |  |  |  | <D,R> [goto COMPENSB] |
| 22 | COMPENSB | COMPENSB | [E] 49 | <1-12,D,R> [goto FOODSMP] |

Could you tell me which range on CARD $C$ best reflects the total amount of income from worker's compensation during the last 12 months?

1. $\$ 0-\$ 999$
2. $\$ 1,000-\$ 1,999$
3. $\$ 2,000-\$ 2,999$
4. $\$ 3,000-\$ 3,999$
5. $\$ 4,000-\$ 4$
. $\$ 5,000-\$ 9,999$
. $\$ 10,000-\$ 149$
. $\mathbf{\$ 1 5 , 0 0 0 - \$ 1 4 , 9 9 9}$
\$20,000-\$29,999

- 

10. \$30,000-\$39,999
11. $\$ 50,000-\$ 49,999$
12. $\$ 50,000$ and over

| During the last 12 months, did $\wedge Y O U \_A N Y M E M ~ r e c e i v e ~ a n y-~$ | $<1>$ | [goto FOODSMPX] |
| :--- | :--- | :--- |
|  | $<2, \mathrm{D}, \mathrm{R}>$ | [goto WELFARE] |

## Food stamps or food stamp money on an EBT card?

- Include any SNAP (supplemantal nutrition assistance program) benefits received.

1. Yes
2. No

|  |  |  | 2. No |  |
| :---: | :---: | :---: | :---: | :---: |
| 22 | FOODSMPX | FOODSMPX | What was the value of all food stamps or food stamp money received on an EBT card? | <1-99999999> [IF FDSTAMPX It 40 or gt 6288 goto ERR1_FOODSMPX] <br> [ELSE goto WELFARE] |
|  |  |  |  | <D,R> [goto FOODSMPB] |

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| :---: | :---: | :---: | :---: | :---: |
| 22 | FOODSMPB | FOODSMPB | [4] 49 | <1-12,D,R> [goto WELFARE] |

Could you tell me which range on CARD C best reflects the total value of all food stamps or food stamp money on an EBT card received in the last 12 months?

1. $\$ 0-\$ 999$
2. $\$ 1,000-\$ 1,999$
3. \$2,000-\$2,999
4. $\$ 3,000-\$ 3,999$
5. $\$ 4,000-\$ 4,999$
6. $\$ 5,000-\$ 9,999$
7. $\$ 10,000-\$ 14,999$
8. $\$ 15,000-\$ 19,999$
9. $\$ 20,000-\$ 29,999$
10. $\$ 30,000-\$ 39,999$
11. \$40,000-\$49,999

22 WELFARE WELFARE $\quad$| During the last 12 months, did ^YOU_ANYMEM receive cash assistance from any state or local government |
| :--- |
| welfare program, such as TANF, or short-term emergency help? |

weifare program, such as TANF, or short-term emergency help?
This would include checks, direct deposits, or EBT cards, but would not include food stamps.
<2,D,R> [goto INC AREX

Yes

| $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: |
| 22 | WELFAREX | WELFAREX | How much cash assistance did you receive last year? | <1-99999999> [IF WELFAREX It 120 or gt 11064 goto ERR1_WELFAREX] [ELSE goto INC_LOSS] |
|  |  |  |  | <D,R> [goto WELFAREB] |
| 22 | WELFAREB | WELFAREB | [14 49 | <1-12,D,R> [goto INC_LOSS] |

Could you tell me which range on CARD C best reflects the total amount of income from cash assistance from state or local government welfare programs during the last 12 months?

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 6. \$5,000-\$9,999 <br> 7. $\$ 10,000-\$ 14,999$ <br> 8. $\$ 15,000-\$ 19,999$ <br> 9. $\$ 20,000-\$ 29,999$ <br> 10. $\$ 30,000-\$ 39,999$ <br> 11. $\$ 40,000-\$ 49,999$ <br> 12. $\$ 50,000$ and over |  |
| 22 | INC_LOSS | INC_LOSS | During the last 12 months, did ^YOU_ANYMEM have any net income or loss from any type of rental rooms or living units? | $<1>$ [goto INCLOSSA] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto CHDSUP] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 22 | INCLOSSA | INCLOSSA | How much net income or loss was received from roomers or boarders? | $<0>$ [goto INCLOSSB] <br> $<1$-99999999> [goto INCLOSSN] <br> $<\mathrm{D}, \mathrm{R}>$ [goto INCLOSAB] |
| 22 | INCLOSAB | INCLOSAB | [4 49 | <0-12, D, R> [goto INCLOSSB] |

# Could you tell me which range on CARD C best reflects your net income or loss from roomers or boarders? 

0. Loss
1. \$1-\$999
2. \$1,000-\$1,999
3. $\$ 2,000-\$ 2,999$
4. $\$ 3,000-\$ 3,999$
5. $\$ 4,000-\$ 4,999$
6. \$5,000-\$9,999
7. \$10,000-\$14,999
8. \$15,999-\$19,999
9. $\$ 20,000-\$ 29,999$
10. \$30,000-\$39,999
11. $\$ 40,000-\$ 49,999$
12. $\$ 50,000$ and over

- Do not read.

Was this an income or a loss?

1. Income
2. LOSS
$<1>$ [IF INCLOSSA gt 1000 then goto ERR1_INCLOSSN [ELSE goto INCLOSSB]
<2> [IF INCLOSSA gt 48000 then goto ERR1_INCLOSSN [ELSE goto INCLOSSB]
<D> [goto INCLOSSB

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| 22 | INCLOSSB | INCLOSSB | How much net income or loss was received from other rental properties? | $<0>$ [goto CHDSUP] <br> $<1-99999999>$ [goto INCLOSBN] <br> $<\mathrm{D}, \mathrm{R}>$ [goto INCLOSBB] |
| 22 | INCLOSBB | INCLOSBB | $\text { W= } 49$ <br> Could you tell me which range on CARD C best reflects your net income or loss from other rental units during the last 12 months? <br> 0. Loss <br> 1. \$1-\$999 <br> 2. $\$ 1,000-\$ 1,999$ <br> 3. $\$ 2,000-\$ 2,999$ <br> 4. $\$ 3,000-\$ 3,999$ <br> 5. $\$ 4,000-\$ 4,999$ <br> 6. $\$ 5,000-\$ 9,999$ <br> 7. $\$ 10,000-\$ 14,999$ <br> 8. \$15,999-\$19,999 <br> 9. $\$ 20,000-\$ 29,999$ <br> 10. $\$ 30,000-\$ 39,999$ <br> 11. \$40,000-\$49,999 <br> 12. $\$ 50,000$ and over | <0-12,D,R> [goto CHDSUP] |
| 22 | INCLOSBN | INCLOSBN | Do not read. <br> Was this an income or a loss? <br> 1. Income <br> 2. Loss | ```<1> [IF INCLOSSB gt 33684 then goto ERR1_INCLOSBN] [ELSE goto CHDSUP] <2> [IF INCLOSSB gt 150000 then goto ERR1_INCLOSBN] [ELSE goto CHDSUP] <D> [goto CHDSUP]``` |
| 22 | CHDSUP | CHDSUP | During the last 12 months, did ^YOU_ANYMEM receive any income from child support? <br> 1. Yes <br> 2. No | $<1>$ [goto CHDLMP] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto <br>  ALIMSUP] |
| 22 | CHDLMP | CHDLMP | Did you receive a one time lump sum payment for child support? <br> 1. Yes <br> 2. No | $<1>$ [goto CHDLMPX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto CHDSPOTH] |
| 22 | CHDLMPX | CHDLMPX | What was the total amount of lump sum payments for child support received by ALL household members in | <0-99999999> [IF CHDLMPX It 58 or gt 11436 goto |

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|  |  |  | the last 12 months? | ERR1_CHDLMPX] $[$ ELSE goto CHDSPOTH] |
|  |  |  |  | <D,R> [goto CHDLMPB] |
| 22 | CHDLMPB | CHDLMPB | [14 49 | <1-12,D,R> [goto CHDSPOTH] |

Could you tell me which range on CARD C best reflects the total amount received in lump sum payments for child support by ALL household members during the last 12 months?

## 1. \$0-\$999

2. $\$ 1,000-\$ 1,999$
3. $\$ 2,000-\$ 2,999$
4. $\$ 2,000-\$ 2,999$
5. $\$ 3,000-\$ 3,999$
6. $\$ 4,000-\$ 4,999$
7. $\$ 5,000-\$ 9,999$
8. $\$ 10,000-\$ 14999$
9. $\$ 10,000-\$ 14,999$
10. $\$ 15,000-\$ 19,999$
. $\$ 20,000-\$ 29,999$
11. $\$ 30,000-\$ 39,999$
12. \$40,000-\$49,999

|  |  |  |  |
| :---: | :---: | :---: | :---: |
| 22 | CHDSPOTH | CHDSPOTH | Did you receive any child support payments in other than a lump sum amount? |


|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| :---: | :---: | :---: | :---: | :---: |
| 22 | CHDOTHX | CHDOTHX | What was the total amount of non-lump sum payments received by ALL household members in the last 12 months? | ```<1-9999999> [IF CHDOTHX It 180 or gt 14400 goto ERR1_CHDOTHX] [ELSE goto ALIMSUP]``` |
|  |  |  |  | <D,R> [goto CHDOTHB] |
| 22 | CHDOTHB | CHDOTHB | [4. 49 | <1-12,D,R> [goto ALIMSUP] |

Could you tell me which range on CARD C best reflects the total amount received in child support payments, other than lump sum amounts, by ALL household members during the last 12 months?

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|  |  |  | 4. \$3,000-\$3,999 <br> 5. \$4,000-\$4,999 <br> 6. \$5,000-\$9,999 <br> 7. \$10,000-\$14,999 <br> 8. \$15,000-\$19,999 <br> 9. \$20,000-\$29,999 <br> 10. \$30,000-\$39,999 <br> 11. \$40,000-\$49,999 <br> 12. \$50,000 and over |  |
| 22 | ALIMSUP | ALIMSUP | During the last 12 months, did ^YOU_ANYMEM receive any REGULAR income fromAlimony? | <1,2,D,R> [goto OTHCONT] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 22 | OTHCONT | OTHCONT | During the last 12 months, did $^{\wedge}$ YOU_ANYMEM receive any REGULAR income from- <br> Other sources such as from persons outside your household? | $<1>\quad[$ IF ALIMSUP $=1$ goto ALIOTHX] $[$ ELSE goto LUMPSUM] |
|  |  |  | 1. Yes <br> 2. No |  |
| 22 | ALIOTHX | ALIOTHX | Altogether, what was the total amount received by all household members from alimony and other sources in the last 12 months? | <1-99999999> [IF ALIOTHX It 80 or gt 27000 goto ERR1_ALIOTHX] <br> [ELSE goto LUMPSUM] |
|  |  |  |  | <D,R> [goto ALIOTHB] |
| 22 | ALIOTHB | ALIOTHB | [E] 49 | <1-12,D,R> [goto LUMPSUM] |
|  |  |  | Could you tell me which range on CARD C best reflects the total amount received in alimony and other sources during the last 12 months? |  |
|  |  |  | 1. \$0-\$999 <br> 2. \$1,000-\$1,999 <br> 3. \$2,000-\$2,999 <br> 4. \$3,000-\$3,999 <br> 5. \$4,000-\$4,999 <br> 6. \$5,000-\$9,999 <br> 7. \$10,000-\$14,999 |  |

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|  |  |  | 8. \$15,000-\$19,999 <br> 9. $\$ 20,000-\$ 29,999$ <br> 10. $\$ 30,000-\$ 39,999$ <br> 11. $\$ 40,000-\$ 49,999$ <br> 12. $\$ 50,000$ and over |  |
| 22 | LUMPSUM | LUMPSUM | During the last 12 months, did ^YOU_ANYMEM receive any- <br> Lump sum payments from insurance, estates, trusts, royalties, alimony, prizes or games of chance, or from persons outside your household? | $\begin{array}{lc} \hline<1> & \text { [goto LUMPSUMX] } \\ <2, \mathrm{D}, \mathrm{R}>\text { [goto SALEINC] } \end{array}$ |
|  |  |  | 1. Yes <br> 2. No |  |
| 22 | LUMPSUMX | LUMPSUMX | What was the total amount received by all household members? | <1-99999999> [IF LUMPSUMX It 5 or gt 106000 goto ERR1_LUMPSUMX] [ELSE goto SALEINC] |
|  |  |  |  | <D,R> [goto LUMPSUMB] |
| 22 | LUMPSUMB | LUMPSUMB | [4] 49 | <1-12,D,R> [goto SALEINC] |
|  |  |  | Could you tell me which range on CARD C best reflects the total lump sum payments during the last 12 months? |  |
|  |  |  | 1. $\$ 0-\$ 999$ <br> 2. $\$ 1,000-\$ 1,999$ <br> 3. $\$ 2,000-\$ 2,999$ <br> 4. $\$ 3,000-\$ 3,999$ <br> 5. $\$ 4,000-\$ 4,999$ <br> 6. $\$ 5,000-\$ 9,999$ <br> 7. \$10,000-\$14,999 <br> 8. $\$ 15,000-\$ 19,999$ <br> 9. $\$ 20,000-\$ 29,999$ <br> 10. $\$ 30,000-\$ 39,999$ <br> 11. \$40,000-\$49,999 <br> 12. $\$ 50,000$ and over |  |
| 22 | SALEINC | SALEINC | During the last 12 months, did ^YOU_ANYMEM receive any - <br> Money from the sale of household furnishings, equipment, clothing, jewelry, pets, or other belongings, not including the sale of vehicles or real estate? | $<1>$ [goto SALEINCX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto OTHERINC] |

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|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 22 | SALEINCX | SALEINCX | What was the total amount received by all household members? | <1-99999999> [IF SALEINCX It 10 or gt 9000 goto ERR1_SALEINCX] [ELSE goto OTHERINC] |
|  |  |  |  | <D,R> [goto SALEINCB] |
| 22 | SALEINCB | SALEINCB | E] 49 | <1-12, D, R> [goto OTHERINC] |
|  |  |  | Could you tell me which range on CARD C best reflects the total amount received from these sales during the last 12 months? |  |
|  |  |  | 1. \$0-\$999 |  |
|  |  |  | 2. \$1,000-\$1,999 |  |
|  |  |  | 3. \$2,000-\$2,999 |  |
|  |  |  | 4. \$3,000-\$3,999 |  |
|  |  |  | 5. $\$ 4,000-\$ 4,999$ |  |
|  |  |  | 6. \$5,000-\$9,999 |  |
|  |  |  | 7. \$10,000-\$14,999 |  |
|  |  |  | 8. \$15,000-\$19,999 |  |
|  |  |  | 9. \$20,000-\$29,999 |  |
|  |  |  | 10. \$30,000-\$39,999 |  |
|  |  |  | 11. \$40,000-\$49,999 |  |
|  |  |  | 12. $\$ 50,000$ and over |  |
| 22 | OTHERINC | OTHERINC | During the last 12 months, did ^YOU_ANYMEM receive any - | $\begin{array}{lc} \hline<1> & \text { [goto OTHRINCX] } \\ <2, \mathrm{D}, \mathrm{R}> & \text { [goto FEDREFNO] } \end{array}$ |
|  |  |  | Other money income, including money received from cash scholarship and fellowships, stipends not based on working, or from the care of foster children? |  |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 22 | OTHRINCX | OTHRINCX | What was the total amount received by all household members? | <1-99999999> [IF OTHRINCX It 100 or gt 23404 goto <br> ERR1_OTHRINCX] <br> [ELSE goto FEDREFNO] |
|  |  |  |  | <D,R> [goto OTHRINCB] |
| 22 | OTHRINCB | OTHRINCB | E] 49 | <1-12,D,R> [goto FEDREFNO] |
|  |  |  | Could you tell me which range on CARD C best reflects the total amount of other money income received |  |

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|  |  |  | during the last 12 months? |  |
|  |  |  | 1. $\$ 0-\$ 999$ <br> 2. $\$ 1,000-\$ 1,999$ <br> 3. $\$ 2,000-\$ 2,999$ <br> 4. $\$ 3,000-\$ 3,999$ <br> 5. $\$ 4,000-\$ 4,999$ <br> 6. $\$ 5,000-\$ 9,999$ <br> 7. $\$ 10,000-\$ 14,999$ <br> 8. $\$ 15,000-\$ 19,999$ <br> 9. $\$ 20,000-\$ 29,999$ <br> 10. \$30,000-\$39,999 <br> 11. \$40,000-\$49,999 <br> 12. $\$ 50,000$ and over |  |
| 22 | FEDREFNO | FEDREFNO | During the last 12 months, did ^YOU_ANYMEM receive any REFUNDS from any of the following Federal income tax? | $<1>$ [goto FEDRFNDX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto SLREFUND] |
|  |  |  | Federal income tax? <br> 1. Yes <br> 2. No |  |
| 22 | FEDRFNDX | FEDRFNDX | What was the total amount received by ALL household members? | $<$ <1-99999999>$[$ IF FEDRFNDX It 50 or gt 7000 goto <br> ERR1_FEDRFNDX] <br> [ELSE goto SLREFUND] |
|  |  |  |  | <D,R> [goto SLREFUND] |
| 22 | SLREFUND | SLREFUND | During the last 12 months, did ^YOU_ANYMEM receive any REFUNDS from any of the following State and local income tax? | $\begin{array}{ll}<1> & \text { [goto SLRFUNDX] } \\ <2, \mathrm{D}, \mathrm{R}> & \text { [goto SSOVERPM] }\end{array}$ |
|  |  |  | 1. Yes <br> 2. No |  |
| 22 | SLRFUNDX | SLRFUNDX | What was the total amount received by ALL household members? | <1-99999999> [IF SLRFUNDX It 10 or gt 2000 goto ERR1_SLRFUNDX] [ELSE goto SSOVERPM] |
|  |  |  |  | <D,R> [goto SSOVERPM] |
| 22 | SSOVERPM | SSOVERPM | During the last 12 months, did ^YOU_ANYMEM receive any REFUNDS from any of the following - | $<1>$ [goto SSOVERPX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto INSRFND] |

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| Overpayment on Social Security? |  |  |  |  |
| $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |  |  |  |
| 22 | SSOVERPX | SSOVERPX | What was the total amount received by ALL household members? | <1-99999999> [IF SSOVERPX It 5 or gt 4500 goto ERR1_SSOVERPX] <br> [ELSE goto INSRFND] |
|  |  |  |  | <D,R> [goto INSRFND] |
| 22 | INSRFND | INSRFND | During the last 12 months, did ^YOU_ANYMEM receive any REFUNDS from any of the following Insurance policies? | $<1>$ [goto INSRFNDX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto PTAXRFND] |
| $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |  |  |  |
| 22 | INSRFNDX | INSRFNDX | What was the total amount received by ALL household members? | <1-99999999> [IF INSRFNDX It 5 or gt 85000 goto ERR1_INSRFNDX] <br> [ELSE goto PTAXRFND] |
|  |  |  |  | <D,R> [goto PTAXRFND] |
| 22 | PTAXRFND | PTAXRFND | During the last 12 months, did ^YOU_ANYMEM receive any REFUNDS from any of the following Property taxes? | $<1>$ [goto PTAXRFDX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto OTHRFND] |
| $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |  |  |  |
| 22 | PTAXRFDX | PTAXRFDX | What was the total amount received by ALL household members? | <1-99999999> [IF PTAXRFDX It 20 or gt 1658 goto ERR1_PTAXRFDX] <br> [ELSE goto OTHRFND] |
|  |  |  |  | <D,R> [goto OTHRFND] |
| 22 | OTHRFND | OTHRFND | During the last 12 months, did ^YOU_ANYMEM receive any REFUNDS from any of the followingOther sources, including any other taxes? | $<1>$ [goto RFNDOTH] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto PDFEDTAX] |

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| 2. No |  |  |  |  |
| 22 | RFNDOTH | RFNDOTH | - Specify: | <30 characters> [goto OTHRFNDX] |
| 22 | OTHRFNDX | OTHRFNDX | What was the total amount received by ALL household members? | <1-99999999> [IF OTHRFNDX It 14 or gt 2400 goto ERR1_OTHRFNDX] <br> [ELSE goto PDFEDTAX] |
|  |  |  |  | <D,R> [goto PDFEDTAX] |
| Federal income tax in addition to that withheld from earnings? |  |  |  |  |
| $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |  |  |  |
| 22 | FEDTAXX | FEDTAXX | What was the total amount paid by ALL household members? | <1-99999999> [IF FEDTAXX It 37 or gt 40000 goto ERR1_FEDTAXX] <br> [ELSE goto PDSLTAX] |
|  |  |  |  | <D,R> [goto PDSLTAX] |
| 22 | PDSLTAX | PDSLTAX | During the last 12 months, did ^YOU_ANYMEM PAY any of the following - <br> State and local income tax in additon to that withheld from earnings? | $\begin{array}{lc} \hline<1> & \text { [goto SLOCTAXX] } \\ <2, \mathrm{D}, \mathrm{R}> & \text { [goto TAXPROP] } \end{array}$ |
| $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |  |  |  |
| 22 | SLOCTAXX | SLOCTAXX | What was the total amount paid by ALL household members? | <1-99999999> [IF SLOCTAXX It 8 or gt 8000 goto ERR1_SLOCTAXX] <br> [ELSE goto TAXPROP] |
|  |  |  |  | <D,R> [goto TAXPROP] |
| 22 | TAXPROP | TAXPROP | During the last 12 months, did $\qquad$ Personal property taxes for vehicles? | $\begin{array}{ll} <1> & \text { [goto TAXPROPX] } \\ <2, \mathrm{D}, \mathrm{R}> & {[\text { goto MISCTAX] }} \end{array}$ |
| $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |  |  |  |
| 22 | TAXPROPX | TAXPROPX | What was the total amount paid by ALL household members? | $<1-99999999>$ [IF TAXPROPX It 18 or gt 3213 goto ERR1_TAXPROPX] |

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|  |  |  |  | [ELSE goto MISCTAX] |
|  |  |  |  | <D,R> [goto MISCTAX] |
| 22 | MISCTAX | MISCTAX | During the last 12 months, did ^YOU_ANYMEM PAY any of the following - | $<1>$ [goto MISCOTH] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto S22B_END] |
|  |  |  | Personal property taxes and other taxes not reported elsewhere? Do not include Social Security tax for the self-employed. |  |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 22 | MISCOTH | MISCOTH | - Specify: | <30 characters> [goto MISCTAXX] |
| 22 | MISCTAXX | MISCTAXX | What was the total amount paid by ALL household members? | <1-99999999> [IF MISCTAXX It 35 or gt 6500 goto ERR1_MISCTAXX] <br> [ELSEIF AGE62 = 1 AND NONEMORT $=1$ goto REVSMORT] <br> [ELSE goto S22B_END] |
|  |  |  |  | <D,R> [IF AGE62 = 1 AND NONEMORT = 1 goto REVSMORT] <br> [ELSE goto S22B END] |
| 22 | REVSMORT | REVSMORT | ${ }^{\wedge}$ DoDoes ${ }^{\text {YYOU_YRCU }}$ have a Reverse Mortgage on this home? | $\begin{array}{ll} \hline<1> & \text { [goto TYPEPAY] } \\ <2 . \mathrm{D} . \mathrm{R}>\text { [aoto 22B ENND } \end{array}$ |
|  |  |  | 1. Yes <br> 2. No |  |
| 22 | TYPEPAY | TYPEPAY | You can be paid in several ways from this mortgage a reverse mortgage. How are you paid from this mortgage? | $\begin{aligned} & <1,2,3,77, \mathrm{R}>\text { [goto TYPEPYX] } \\ & <4> \end{aligned} \quad \text { [goto TYPPYOTH] }$ |
|  |  |  | - Enter all that apply, separate with commas. |  |
|  |  |  | 1. Lump Sum <br> 2. Regular monthly payment <br> 3. Credit Line account <br> 4. Other <br> 77. Don't know |  |
| 22 | TYPPYOTH | TYPPYOTH | - Specify: | <30 characters> [goto TYPEPYX] |
| 22 | TYPEPYX | TYPEPYX | Since the first of ^REF_MONTH, how much ^HAVE_HAS ^YOU_YRCU received from this mortgage? | <0-99999> [IF (TYPEPAY $=2$ and TYPEPYX It 1200 OR gt 8000) OR (TYPEPAY = 1,3,4 and TYPEPYX gt 25000) then, goto ERR1_TYPEPYX] |

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|  |  |  |  | [ELSE goto S22B_END] |
|  |  |  |  | <D,R> [goto S22B_END] |
| 22 | SAVACCTX | SAVACCTX | Now I am going to ask about changes in assets. <br> As of the last day of ^LAST_MONTH, what was the total balance or market value (including interest earned) of | <0-99999999> [IF SAVACCTX gt 150000 goto ERR1_SAVACCTX] <br> [ELSE goto CKBKACTX] |
|  |  |  | Savings accounts in banks, savings and loans, credit unions and similar accounts? | <D,R> [goto CKBKACTX] |
| 22 | CKBKACTX | CKBKACTX | As of the last day of ^LAST_MONTH, what was the total balance or market value (including interest earned) of Checking accounts, brokerage accounts and other similar accounts? | $\begin{aligned} & \text { <0-99999999> [IF CKBKACTX gt } 55300 \text { goto } \\ & \text { ERR1_CKBKACTX] } \\ & \text { [ELSE goto USBNDX] } \end{aligned}$ |
|  |  |  |  | <D,R> [goto USBNDX] |
| 22 | USBNDX | USBNDX | As of the last day of ^LAST_MONTH, what was the total balance or market value (including interest earned) of U.S. Savings bonds? | $\begin{gathered} <0-99999999>\text { [IF USBNDX gt } 10000 \text { goto } \\ \text { ERR1_USBNDX] } \\ \text { [ELSE goto COMPSAV] } \end{gathered}$ |
|  |  |  |  | <D,R> [goto COMPSAV] |
| 22 | COMPSAV | COMPSAV | How does the amount your household had on the last day of ^LAST_MONTH compare with the amount your household had on the last day of ^LAST_MONTH one year ago in - | $\begin{array}{lc}<1, \mathrm{D}, \mathrm{R}> & \text { [goto COMPCKG] } \\ <2,3> & \text { [goto COMPSAVX] }\end{array}$ |
|  |  |  | Savings accounts? |  |
|  |  |  | 1. Same <br> 2. More <br> 3. Less |  |
| 22 | COMPSAVX | COMPSAVX | How much (more/less)? | $\begin{aligned} & \text { <1-999999999> [IF COMPSAVX gt } 29396 \text { goto } \\ & \text { ERR1_COMPSAVX] } \\ & {[\text { [ELSE goto COMPCKG] }} \end{aligned}$ |
|  |  |  |  | <D,R> [goto COMPCKG] |
| 22 | COMPCKG | COMPCKG | How does the amount your household had on the last day of ^LAST_MONTH compare with the amount your household had on the last day of ^LAST_MONTH one year ago in - | $\begin{array}{lc} \hline<1, \mathrm{D}, \mathrm{R}> & \text { [goto COMPBND] } \\ <2,3> & \text { [goto COMPCKGX] } \end{array}$ |
|  |  |  | Checking accounts? |  |
|  |  |  | 1. Same <br> 2. More <br> 3. Less |  |

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| :---: | :---: | :---: | :---: | :---: |
| 22 | COMPCKGX | COMPCKGX | How much (morelless)? | $\begin{aligned} & \text { <1-999999999> [IF COMPCKGX gt } 19000 \text { goto } \\ & \text { ERR1_COMPCKGX] } \\ & \text { [ELSE goto COMPBND] } \end{aligned}$ |
|  |  |  |  | <D,R> [goto COMPBND] |
| 22 | COMPBND | COMPBND | How does the amount your household had on the last day of ^LAST_MONTH compare with the amount your household had on the last day of ^LAST_MONTH one year ago in - | $\substack{<1, \mathrm{D}, \mathrm{R}>\\ <2,3>}$ [goto SECOWND] <br> [goto COMPBNDX]  |
|  |  |  | U.S. Savings bonds? |  |
|  |  |  | 1. Same <br> 2. More <br> 3. Less |  |
| 22 | COMPBNDX | COMPBNDX | How much (more/less)? | $\begin{aligned} & \text { <1-99999999> [IF COMPBNDX gt } 2500 \text { goto } \\ & \text { ERR1_COMPBNDX] } \\ & \quad[\text { ELSE goto SECOWND] } \end{aligned}$ |
|  |  |  |  | <D,R> [goto SECOWND] |
| 22 | SECOWND | SECOWND | Did ^YOU_ANYMEM own any securities, such as stocks, mutual funds, private bonds, government bonds, or Treasury notes on the last day of ^LAST_MONTH? | $<1>$ [goto SECESTX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto PURSSEC] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 22 | SECESTX | SECESTX | What was the estimated value of all such securities on the last day of ^LAST_MONTH? | <1-99999999> [IF SECESTX It 100 or gt 250000 goto <br> ERR1_SECESTX] <br> [ELSE goto COMPSEC] |
|  |  |  |  | <D,R> [goto COMPSEC] |
| 22 | COMPSEC | COMPSEC | How does this compare with the value of such securities your household held on the last day of ^LAST_MONTH one year ago? | $\begin{array}{lc}<1, \mathrm{D}, \mathrm{R}> & \text { [goto PURSSEC] } \\ <2,3> & \text { [goto COMPSECX] }\end{array}$ |
|  |  |  | 1. Same <br> 2. More <br> 3. Less |  |
| 22 | COMPSECX | COMPSECX | How much (more/less)? | <1-99999999> [IF COMPSECX It 5 or gt 300000 goto <br> ERR1_COMPSECX] <br> [ELSE goto PURSSEC] |

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| :---: | :---: | :---: | :---: | :---: |
|  |  |  |  | <D,R> [goto PURSSEC] |
| 22 | PURSSEC | PURSSEC | During the last 12 months, did ^YOU_ANYMEM PURCHASE any stocks, mutual funds, or bonds? | <1> [goto PURSSECX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto SELLSEC] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 22 | PURSSECX | PURSSECX | What was the total purchase price including broker fees? | <1-99999999> [IF PURSSECX It 35 or gt 271183 goto ERR1_PURSSECX] [ELSE goto SELLSEC] |
|  |  |  |  | <D,R> [goto SELLSEC] |
| 22 | SELLSEC | SELLSEC | During the last 12 months, did ^YOU_ANYMEM SELL any stocks, mutual funds, or bonds? | $\begin{array}{ll} \hline<1> & \text { [goto SELLSECX] } \\ <2, \mathrm{D}, \mathrm{R}> & \text { [goto COLPLAN] } \end{array}$ |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 22 | SELLSECX | SELLSECX | What was the net amount received from sales after subtracting broker fees? | <1-99999999> [IF SELLSECX is It 5 or gt 600000 goto ERR1_SELLSECX] <br> [ELSE goto COLPLAN] |
|  |  |  |  | <D,R> [goto COLPLAN] |
| 22 | COLPLAN | COLPLAN | During the last 12 months, did ^YOU_ANYMEM put any money into a tax-deferred or tax-free educational savings plan, such as, section 529 plan, state sponsored pre-paid tuition plans, or educational IRA's for ^YOURSELF? | $<1>$ [goto COLPLANX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto BSINVST] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 22 | COLPLANX | COLPLANX | How much? | <1-99999999> [IF COLPLANX It 25 or gt 20000 goto <br> ERR1_COLPLANX] <br> [ELSE goto BSINVST] |
|  |  |  |  | <D,R> [goto BSINVST] |
| 22 | BSINVST | BSINVST | During the last 12 months, did ^YOU_ANYMEM make any investments to your own business or farm? | $<1>$ [goto BSINVSTX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto WDBSAST] |


|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| :---: | :---: | :---: | :---: | :---: |
| 22 | BSINVSTX | BSINVSTX | How much did you invest? | <1-99999999> [IF BSINVSTX It 50 or gt 100000 goto ERR1_BSINVSTX] [ELSE goto WDBSAST] |

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| :---: | :---: | :---: | :---: | :---: |
|  |  |  |  | <D,R> [goto WDBSAST] |
| 22 | WDBSAST | WDBSAST | During the last 12 months, did ^YOU_ANYMEM withdraw any assets from your own business or farm? | $<1>$ [goto WDBSASTX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto WDBSGDS] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 22 | WDBSASTX | WDBSASTX | What was the value of such assets? | <1-99999999> [IF WDBSASTX It 5 or gt 200000 goto ERR1_WDBSASTX] [ELSE goto WDBSGDS] |
|  |  |  |  | <D,R> [goto WDBSGDS] |
| 22 | WDBSGDS | WDBSGDS | During the last 12 months, were any goods or services from your own business or farm withdrawn for personal use? | $<1>$ [goto WDBSGDSX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto MONYOWE] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 22 | WDBSGDSX | WDBSGDSX | What was the value of these goods or services? | <1-99999999> [IF WDBSGDSX It 5 or gt 20000 goto ERR1_WDBSGDSX] <br> [ELSE goto MONYOWE] |
|  |  |  |  | <D,R> [goto MONYOWE] |
| 22 | MONYOWE | MONYOWE | On the last day of ^LAST_MONTH, did anyone outside of your household owe money to ^YOU_ANYMEM? | $<1>$ [goto COMPOWD] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto MONYOWD] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 22 | COMPOWD | COMPOWD | How does the amount owed to your household on the last day of ^LAST_MONTH compare with the amount owed to your household by persons outside your household on the last day of ^LAST_MONTH one year ago? | $\substack{<1, \mathrm{D}, \mathrm{R}>\\ <2,3>}$ [goto MONYOWD] <br> [goto COMPOWDX]  |
|  |  |  | 1. Same <br> 2. More <br> 3. Less |  |
| 22 | COMPOWDX | COMPOWDX | How much (more/less)? | <1-99999999> [IF COMPOWDX It 5 or gt 40000 goto ERR1_COMPOWDX] <br> [ELSE goto MONYOWD] |
|  |  |  |  | <D,R> [goto MONYOWD] |

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
| 22 | MONYOWD | MONYOWD | Did anyone outside of your household owe money to ^YOU_ANYMEM on the last day of ^LAST_MONTH ONE YEAR AGO? | $<1>$ [goto MONYOWDX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto SETLINS] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 22 | MONYOWDX | MONYOWDX | How much was owed? | <1-99999999> [IF MONYOWDX It 5 or gt 103000 goto ERR1_MONYOWDX] [ELSE goto SETLINS] |
|  |  |  |  | <D,R> [goto SETLINS] |
| 22 | SETLINS | SETLINS | During the last 12 months, did ^YOU_ANYMEM receive settlement on surrender of any insurance policies (life or annuity)? | $<1>$ [goto SETLINSX] <br> $<2, \mathrm{D}, \mathrm{R}>$ [goto S22G_END] |
|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 22 | SETLINSX | SETLINSX | How much did you receive? | <1-99999999> [IF SETLINSX gt 70000 goto ERR1_SETLINSX] <br> [ELSE goto S22G_END] |
|  |  |  |  | <D,R> [goto S22G_END] |
| POP | LDLNPHON | LDLNPHON | Do youlyour household currently have at least one phone inside your home that is currently working and is not a cell phone? | <1, 2, DF, RF> [goto POP_INTRO] |
|  |  |  | 1. Yes <br> 2. No |  |
| POP | POP_INTRO | POP_INTRO | Now I have a few questions about where <youlyour household> last shopped for select items. For the following categories, please tell me the name of the store, business, or website that you or anyone in your household last made a purchase and whether the purchase was made by personal visit to the store, online, by catalog or phone order, or by another method. <br> 1. Enter 1 to continue | <1> [goto ELECPOP] |
| POP | ELECPOP | ELECPOP | Where did you last purchase electronics? | < 30 char, DK, RF> [goto PURELEC] |
| POP | PURELEC | PURELEC | Was that purchase made by personal visit, online, phone/catalog or some other way? | <1-4, DK, RF> [goto MUSICPOP] |

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 1. Personal visit <br> 2. Internet purchase <br> 3. Phone or catalog purchase <br> 4. Another method |  |
| POP | MUSICPOP | MUSICPOP | Where did you last purchase music? | <30 char, DK, RF> [goto PURMUSIC] |
| POP | PURMUSIC | PURMUSIC | Was that purchase made by personal visit, online, phone/catalog or some other way? | <1-4, DK, RF> [goto CLOTHPOP] |
|  |  |  | 1. Personal visit <br> 2. Internet purchase <br> 3. Phone or catalog purchase <br> 4. Another method |  |
| POP | CLOTHPOP | CLOTHPOP | Where did you last purchase clothing? | <30 char, DK, RF> [goto PURCLOTH] |
| POP | PURCLOTH | PURCLOTH | Was that purchase made by personal visit, online, phone/catalog or some other way? | <1-4, DK, RF> go to RESTPOP |
|  |  |  | 1. Personal visit <br> 2. Internet purchase <br> 3. Phone or catalog purchase <br> 4. Another method |  |
| POP | RESTPOP | RESTPOP | Where did you last make a restaurant purchase? | <30 char, DK, RF> [goto PURREST] |
| POP | PURREST | PURREST | Was that purchase made by personal visit, online, phone/catalog or some other way? | <1-4, DK, RF> [goto GROCPOP] |
|  |  |  | 1. Personal visit <br> 2. Internet purchase <br> 3. Phone or catalog purchase <br> 4. Another method |  |
| POP | GROCPOP | GROCPOP | Where did you last purchase groceries? | <30 char, DK, RF> [goto PURGROC] |
| POP | PURGROC | PURGROC | Was that purchase made by personal visit, online, phone/catalog or some other way? | <1-4, DK, RF> [go to RES_INTRO] |

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 2. Internet purchase <br> 3. Phone or catalog purchase <br> 4. Another method |  |
| BACK RES | RES_INTRO | RES_INTRO | We're almost done with the survey. I just have a few questions before we wrap up. <br> 1. Enter 1 to Continue | $<1>$ [IF INTNMBR $=5$ then goto RESPOBJ] [ELSE goto RESPIB] |
| BACK RES | RESPOBJ | RESPOBJ | We'd like to produce additional statistical data, without taking up your time with more questions, by combining your survey answers with data from other government agencies. Do you have any objections? <br> 1. Yes, object <br> 2. No, do not object | $<1>$ [goto RESOBJSP] <br> $<2, \mathrm{DK}, \mathrm{RF}>$ [goto RESPIB] |
| BACK RES | RESOBJSP | RESOBJSP | What are your objections? | <30 characters,DK,RF> [goto RESPIB] |
| BACK RES | RESPIB | RESPIB | Enter 4 if not a personal visit <br> Did you provide the Information Booklet to the respondent? <br> 1. Yes, and respondent used Info Book <br> 2. Yes, but respondent did not use Info Book <br> 3. No, did not provide Info Book <br> 4. Not a personal visit | $<1>$ [goto IBHELPFL] <br> $<2>$ [goto NOUSEIB] <br> $<3,4>$ [IF INTNMBR $=3$ goto AUTOBLPY] <br>  [ELSE EXIT RESEARCH BLOCK] |
| BACK RES | IBHELPFL | IBHELPFL | During the interview we referred to a booklet that lists a variety of things you might have purchased. Was this booklet helpful to you? <br> 1. Yes <br> 2. No | $\begin{gathered} \text { <1,RF> [IF INTNMBR = } 3 \text { goto AUTOBLPY] } \\ \text { [ELSE EXIT RESEARCH BLOCK] } \\ <2, \text { DK> [goto IBNTHPFL] } \end{gathered}$ |
| BACK RES | IBNTHPFL | IBNTHPFL | Why wasn't the booklet helpful? <br> Enter all that apply, separate with commas. <br> 1. It was too long <br> 2. It was too hard to use <br> 3. It took too much time to use <br> 4. There were too many examples <br> 5. It was hard to read <br> 6. It wasn't clear I was supposed to use it <br> 7. This wasn't my first interview - knew what you would ask <br> 8. Other, specify | <1-7,DK,RF> [IF INTNMBR = 3 goto AUTOBLPY] <br> [ELSE EXIT RESEARCH BLOCK] <br> <8> [goto IBNTHPSP] |
| BACK RES | IBNTHPSP | IBNTHPSP | - Specify: | <30 characters,DK,RF> [IF INTNMBR = 3 goto AUTOBLPY] <br> [ELSE EXIT RESEARCH BLOCK] |
| BACK RES | NOUSEIB | NOUSEIB | Before we started the interview, I gave you a booklet that lists a variety of things you might have purchased. What about the book made you decide not to use it? | <1-7,DK,RF> [IF INTNMBR = 3 goto AUTOBLPY] <br> [ELSE EXIT RESEARCH BLOCK] |

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| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | - Enter all that apply, separate with commas. <br> 1. It was too long <br> 2. It looked too hard to use <br> 3. It took too much time to use <br> 4. There were too many examples <br> 5. It was hard to read <br> 6. It wasn't clear I was supposed to use it <br> 7. This wasn't my first interview - I knew what you would ask <br> 8. Other, specify |  |
| BACK RES | NOUSIBSP | NOUSIBSP | - Specify: | <30 characters,DK,RF> [IF INTNMBR = 3 goto AUTOBLPY] [ELSE EXIT RESEARCH BLOCK] |
| BACK RES | AUTOBLPY | AUTOBLPY | Do ^YOU_ANYMEM pay any bills through automatic deductions from a bank account? <br> 1. Yes <br> 2. No | <1,2,DK,RF> [goto FINSOFT] |
| BACK RES | FINSOFT | FINSOFT | Do ^YOU_ANYMEM use any electronic financial software, such as Quicken, or use a website to track expenses? <br> 1. Yes <br> 2. No | $\begin{aligned} & \text { <1> [goto FNSFTTYP] } \\ & \text { <2,DK,RF> [EXIT RESEARCH BLOCK] } \end{aligned}$ |
| BACK RES | FNSFTTYP | FNSFTTYP | What software or website do ^YOU_ANYMEM use? <br> 1. Quicken <br> 2. Microsoft Money <br> 3. Mint.com <br> 4. Other, specify | $\begin{aligned} & \hline<1-3, \mathrm{DK}, \mathrm{RF}> \\ & <\text { [EXIT RESEARCH BLOCK] } \\ & <4>\quad \text { [goto FNSFTSP] } \end{aligned}$ |
| BACK RES | FNSFTSP | FNSFTSP | - Specify: | <30 characters,DK,RF> [EXIT RESEARCH BLOCK] |
|  | SKIP_CHECK | SKIP_CHECK | Some Sections have been skipped. <br> Is there anyone in the household now that would be able to provide information on: <br> - Press Shift-F5 to view the status table <br> 1. Yes <br> 2. No <br> 3. Battery problem | $<1>$ [goto SK_RESP] <br> $<2>$ [goto APPTOTH] <br> $<3>$ [goto DONE] |
| BACK | SK_RESP | SK_RESP | Ask if necessary: <br> With whom am I speaking? <br> ENTER LINE NUMBER or 95. For proxy respondent | ```<1-30> [If (SKIPFLAG[SK_RESP] = 1) OR (SK_RESP gt NROSIZ) OR (AGERNG[SK_RESP] It 2) OR (HHMEM[SK_RESP] = 2) then goto CK_SK_RESP]``` |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 1. ^NAME[1] <br> 2. ^NAME[2] <br> 3. ^NAME[3] <br> 4. ^NAME[4] <br> 5. ^NAME[5] <br> 6. ^NAME[6] <br> 7. ^NAME[7] <br> 8. ^NAME[8] <br> 9. ^NAME[9] <br> 10. ^NAME[10] <br> 11. ^NAME[11] <br> 12. ^NAME[12] <br> 13. ^NAME[13] <br> 14. ^NAME[14] <br> 15. ^NAME[15] <br> 16. ^NAME[16] <br> 17. ^NAME[17] <br> 18. ^NAME[18] <br> 19. ^NAME[19] <br> 20. ^NAME[20] <br> 21. ^NAME[21] <br> 22. ^NAME[22] <br> 23. ^NAME[23] <br> 24. ^NAME[24] <br> 25. ^NAME[25] <br> 26. ^NAME[26] <br> 27. ^NAME[27] <br> 28. ^NAME[28] <br> 29. ^NAME[29] <br> 30. ^NAME[30] <br> 95. Proxy Respondent |  $[$ ELSE goto SK_RESP2] <br> <95> $[$ goto SK_RESP2] |
| BACK | APPTOTH | APPTOTH | I'd like to schedule a DATE to (conduct/complete) the interview. What DATE AND TIME would be best to visit again? <br> Today is: (current date) <br> B. Battery problem <br> Missing Sections: Press shift-F5 to view the status table | <25 characters> [goto THANKCB] <B> [goto DONE] <R> [IF outcome = 202 goto CBREF] [ELSE goto VERIFY_INFO] |
|  | CBREF | CBREF | Exit this case now. <br> Call the case up again and make it a TYPE A non-interview before transmitting. <br> 1. Enter 1 to Continue | <1> [goto VERIFY_INFO] |
|  | THANKCB | THANKCB | Thank you. | <1> [goto VERIFY_INFO] |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | I will come back at the time suggested <br> Revisit (Appointment information) <br> 1. Enter 1 to Continue |  |
|  | DK_CHECK | DK_CHECK | - Are there any Don't Know items that you need to callback for? <br> - Press Ctrl-M to review all Don't Knows | $<1>$ [goto DK_APPT] <br> $<2>$ [goto THAANKYOU] |
|  |  |  | 1. Yes <br> 2. No |  |
|  | DK_APPT | DK_APPT | I'd like to schedule a DATE to complete the missing items. What DATE AND TIME would be best to visit you again? Today is (current date) DK Items: Press Ctrl-M to review all Don't Knows | <25 characters> [goto DK_THANK] |
|  | DK_THANK | DK_THANK | Thank you. <br> I will come back at the time suggested. <br> - Revisit: (Appointment information) <br> 1. Enter 1 to Continue | <1> [goto VERIFY_INFO] |
|  | THANKYOU | THANKYOU | This concludes the interview. Thank you for your patience, and for taking the time to answer our questions. <br> Let me remind you that the information you provide is very valuable because it is used to update the Consumer Price Index, which is one of our nation's leading economic indicators. <br> That is why we sincerely appreciate your participation in this survey (and look forward to your continued cooperation when we contact you again in 3 months.) <br> Interview number: ^INTNMBR <br> - NOTE: Inform the respondent that a supervisor may call them to conduct re-interview. <br> Explain re-interview as needed. <br> 1. Enter 1 to Continue | <1> [goto HOW_INTV] |
| BACK | THANK2 | THANK2 | Thank you for your time. You've been very helpful. NOTE: Inform the respondent that a supervisor | <1> [IF BCNAME ne blank goto VERIFY_INFO] <br> [ELSEIF (NONTYP = 1 AND SECTCOMP[2,3] = 1) OR (NONTYP = 1-3) then goto TELPV] |



> - Interview number: ^INTNMBR


|  |  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| :---: | :---: | :---: | :---: | :---: |
| BACK | MISS_SEC | MISS_SEC | No survey data were collected for a required section(s) in a 302 interview. | <30 characters> [goto TELPV] |
|  |  |  | - Press F5 to view status table |  |
|  |  |  | Enter the reason that best describes why survey data was not collected. |  |
| BACK | HOW_INTV | HOW_INTV | - How did you collect the data for this (first/second/third/fourth/fifth) interview for this household? | $\begin{aligned} & <1,6>\text { [goto SNGL_INT] } \\ & <2>\text { [goto TEL_RESN] } \end{aligned}$ |
|  |  |  | 1. Personal visit for all sections | <3,4,5> [goto TEL_SECT] |
|  |  |  | 2. Personal visit for all sections, but telephone followup for some questions |  |
|  |  |  | 3. Personal visit for more than half of the sections, the rest by telephone |  |
|  |  |  | 4. Equally split between personal visit and telephone |  |
|  |  |  | 5. Telephone for more than half of the sections, the rest by personal visit 6. Telephone for all sections |  |
| BACK | SNGL_INT | SNGL_INT | Were you able to conduct the interview in a single ^VISITCALL? | $<1,2>$ [lf HOW_INTV $=6$ goto TEL_RESN] [else goto CONVREF] |

1. Yes
2. No

TEL_SECT TEL_SECT
Which of these sections did you collect entirely by telephone?
Enter all that apply, separate with commas
Do not select 6 or 7 if any part of the section was collected in person.

1. Section 3 Housing - rent, mortgage, home equity loans.
2. Section 4 Utilities/Communications (electricity, heating, telephone, cable, internet)
3. Section 6 Appliances

| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 4. Section 8 Home Furnishings <br> 5. Section 9 Clothing <br> 6. Sections 10, 11, and 12 Vehicle Expenses <br> 7. Sections 13 and 14 Insurance <br> 8. Section 15 Medical/Health Expenses <br> 9. Section 18 Trips and Vacations <br> 10. Section 22 Work Experience and Income |  |
| BACK | TEL_RESN | TEL_RESN | What was the main reason for collecting data by telephone? <br> 1. Barriers to reaching the sample unit (i.e., doorman, security, dog). <br> 2. Collecting data from additional respondent(s) in household <br> 3. Excessive distance or travel time to sample unit. <br> 4. Respondent called FR to do interview. <br> 5. Respondent only available by telephone (scheduling issues). <br> 6. Respondent refused personal visit. <br> 7. Respondent requested telephone interview. <br> 8. Other (Specify). | <1-7> [goto CONVREF] <8> [goto OTHTLRSN] |
| BACK | OTHTLRSN | OTHTLRSN | - Specify | <30 characters> [goto CONVREF] |
| BACK | TELPV | TELPV | How did you collect MOST of the data for this case? (Include follow-ups) <br> 1. By personal visit <br> 2. By phone | $<1,2>$ [IF NONTYP = 1 AND SECTCOMP[2 or 3] = 1 AND <br> NOCONTACT = 0 goto RESPON] <br> [ELSEIF NONTYPE = 1-3 goto DONE] <br> [ELSE goto CONVREF] |
| BACK | CONVREF | CONVREF | ? [F1] <br> - Was this a converted refusal? <br> 1. Yes <br> 2. No | <1,2> [goto RESPON] |
| BACK | RESPON | RESPON | Enter the line number of the MAIN respondent. <br> 1. ^NAME[1] <br> 2. ^NAME[2] <br> 3. ^NAME[3] <br> 4. ^NAME[4] <br> 5. ^NAME[5] <br> 6. ^NAME[6] <br> 7. ^NAME[7] | <1-30,95> [goto OTHRESP] |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 8. ^NAME[8] <br> 9. ^NAME[9] <br> 10. ^NAME[10] <br> 11. ^NAME[11] <br> 12. ^NAME[12] <br> 13. ^NAME[13] <br> 14. ^NAME[14] <br> 15. ^NAME[15] <br> 16. ^NAME[16] <br> 17. ^NAME[17] <br> 18. ^NAME[18] <br> 19. ${ }^{\text {N }}$ NAME[19] <br> 20. ^NAME[20] <br> 21. ^NAME[21] <br> 22. ${ }^{\wedge}$ NAME[22] <br> 23. ${ }^{\wedge}$ NAME[23] <br> 24. ${ }^{\wedge}$ NAME[24] <br> 25. ^NAME[25] <br> 26. ^NAME[26] <br> 27. ${ }^{\wedge}$ NAME[27] <br> 28. ^NAME[28] <br> 29. ^NAME[29] <br> 30. ^NAME[30] <br> 95. Proxy Respondent |  |
| BACK | OTHRSP | OTHRSP | Enter the line number of ALL OTHER respondents. <br> Enter 0 For None <br> (Display Names of persons in the household) <br> 0. None <br> 1. ^NAMEonly(1) <br> 2. ^NAMEonly(2) <br> 3. ^NAMEonly(3) <br> 4. ^NAMEonly(4) <br> 5. ^NAMEonly(5) <br> 6. ^NAMEonly(6) <br> 7. ^NAMEonly(7) <br> 8. ^NAMEonly(8) <br> 9. ^NAMEonly(9) <br> 10. ^NAMEonly(10) <br> 11. ^NAMEonly(11) <br> 12. ^NAMEonly(12) <br> 13. ^NAMEonly(13) <br> 14. ^NAMEonly(14) | $<0-30,95>$ [If OTHRSP $=$ RESPON goto CK_OTHRSP] [else goto USERECS] |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 15. ^NAMEonly(15) <br> 16. ^NAMEonly(16) <br> 17. ^NAMEonly(17) <br> 18. ^NAMEonly(18) <br> 19. ^NAMEonly(19) <br> 20. ^NAMEonly(20) <br> 21. ^NAMEonly(21) <br> 22. ^NAMEonly(22) <br> 23. ^NAMEonly(23) <br> 24. ^NAMEonly(24) <br> 25. ^NAMEonly(25) <br> 26. ^NAMEonly(26) <br> 27. ^NAMEonly(27) <br> 28. ^NAMEonly(28) <br> 29. ^NAMEonly(29) <br> 30. ^NAMEonly(30) <br> 95. Proxy respondent |  |
| BACK | USERECS | USERECS | In this interview, how often did the respondent consult records? <br> 1. Always or almost always ( $90 \%$ of the time or more) <br> 2. Most of the time ( $50 \%$ ot $89 \%$ of the time) <br> 3. Occasionally ( $10 \%$ to $49 \%$ of the time) <br> 4. Never or almost never (less than $10 \%$ of the time) | $<1-3>$ [goto TYPEREC] <br> $<4>$ [goto HOMEFILE] |
| BACK | TYPERECS | TYPERECS | What types of bills, receipts, or records did the respondent(s) use to answer expenditure questions? <br> Enter all that apply, separate with commas. <br> 1. Bills <br> 2. Checkbook ledger or check stubs <br> 3. Personal finance or budgeting software records <br> 4. Receipts of purchase (e.g., sales slips) <br> 5. Home file (provided by Census Bureau) <br> 6. Contracts of agreements <br> 7. Bank statements or online bill-paying statements <br> 8. Other- specify <br> 9. None | <1-7> [goto RECT_SEC]  <br> $<8>$ [goto SPECRECS]  <br> $<9>$ [IF 9 is selected with any other answer list option,  <br>  goto CK_TYPERCS]  <br>  [ELSE goto HOMEFILE]  |
| BACK | SPECRECS | SPECRECS | - Specify | <30 characters> [goto RECT_SEC] |
|  |  | RECT_SEC | Which of these sections did the respondent(s) use bills, receipts, or other resources to answer expenditure questions? | <1-10> [goto RECORDS] |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | - Enter all that apply, separate with commas. <br> 1. Sections 2 and 3 Housing - rent, mortgage, home equity loans <br> 2. Section 4 Utilities/Communications (electricity, heating, telephone, cable, internet) <br> 3. Section 6 Appliances <br> 4. Section 8 Home Furnishings <br> 5. Section 9 Clothing <br> 6. Section 10, 11, and 12 Vehicle Expenses <br> 7. Section 13 and 14 Insurance <br> 8. Section 15 Medical/ Health Expenses <br> 9. Section 18 Trips and Vacations <br> 10. Section 22 Work Experience and Income |  |
| BACK | RECORDS | RECORDS | Did the respondent hand you any records, bills, or receipts during the interview? <br> Records such as utility bills, mortgage statements, credit card bills, or pay stubs. <br> 1. Yes <br> 2. No | $\begin{aligned} & \text { <1> [goto REC_SP] } \\ & <2>\text { [goto HOMEFILE] } \end{aligned}$ |
| BACK | REC_SP | REC_SP | - Please describe the records that were given to you. | <30 characters> [goto RECINFO] |
| BACK | RECINFO | RECINFO | - For most of the records, were you able to find the required information (e.g., item description, date, price)? <br> 1. Yes <br> 2. No | <1> [goto HOMEFILE] <br> <2> [goto RECDIFF] |
| BACK | RECDIFF | RECDIFF | Why were you unable to find the required expenditure information? <br> Enter all that apply, separate with commas <br> 1. The record was unclear, difficult to read <br> 2. The record did not provide the required level of detail <br> 3. The record did not match the expenditure categories <br> 4. Other, specify | <1-3> [goto HOMEFILE] <4> [goto RECD_SP] |
| BACK | RECD_SP | RECD_SP | - Specify: | <30 characters> [goto HOMEFILE] |
| BACK | HOMEFILE | HOMEFILE | Did you give the respondent a Home File this quarter? | <1,2> [goto INFOBOOK] |

## 1. Yes



- In the interview, how often did the respondent consult the information booklet?
- If reading the book to the respondent, enter 5 .

| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 1. Almost always ( $90 \%$ of the time or more) <br> 2. Most of the time ( $50 \%$ to $89 \%$ of the time) <br> 3. Occasionally ( $10 \%$ to $49 \%$ of the time) <br> 4. Never or almost never (less than $10 \%$ of the time) <br> 5. The respondent did not have access to the information booklet. |  |
| BACK | LANGUAGE | LANGUAGE | - In what language was the interview conducted? | $\begin{array}{ll} \hline<1,2> & \text { [goto VERIFY_INFO] } \\ <3> & \text { [goto LANG_SP] } \end{array}$ |
|  |  |  | 1. English <br> 2. Spanish <br> 3. Other - specify |  |
| BACK | LANG_SP | LANG_SP | - Specify | <30 characters> [goto VERIFY_INFO] |
| BACK | VERIFY_INFO | VERIFY_INFO | Verify/change any of the information listed below <br> Telephone number: ((area)) (phone number) (Extension) Second phone: (2nd phone number) (2nd phone extension) Best time to call : (Bestime code description) Specific best time: (best time specify) <br> No Sunday: ((No Sunday Interview/Sunday interview okay)) | ```<1> [IF INTNMBR = 5 AND (THANKYOU \(=1\) or DK_THANK = 1) goto RESPCOOP] [ELSEIF INTNMBR \(=3\) AND \((\) THANKYOU \(=1\) or DK_THANK = 1) AND NUMHOUSE gt 1 goto RESPINFO] [EISEIF INTNMBR \(=3\) AND (THANKYOU \(=1\) or DK_THANK = 1) goto INFOQUAL] [ELSE goto DONE]``` |
|  |  |  | 1. Enter 1 to Continue <br> 2. Change something |  |
| BACK | V_PHONE | v_PHONE | What is your telephone number? <br> Enter 0 for none. | $\qquad$ |
| V_BSTT |  | v_BSTT | - Best time to contact | $<1-9$, Empty> [goto V_BSTTI2] <br> $<10>$ [goto DOONE] |
|  |  |  | 1. Morning (9am-12noon) <br> 2. Noon/lunchtime (11am-1pm) <br> 3. Afternoon (12noon-4pm) <br> 4. Suppertime/early evening/dinnertime(4pm-7pm) <br> 5. Evening ( $6 \mathrm{pm}-9 \mathrm{pm}$ ) <br> 6. Anytime (9am-9pm) |  |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 7. Late evening/night (7pm-9pm) <br> 8. Daytime ( $9 \mathrm{am}-4 \mathrm{pm}$ ) <br> 9. After 5 pm <br> 10. Battery problem |  |
| BACK | V_BSTTI2 | V_BSTTI2 | - Enter specific best time to contact | <30 characters, empty> [goto V_NOSUN] |
| BACK | V_NOSUN | v_NOSUN | Would a Sunday interview be acceptable? <br> 1. Yes <br> 2. No <br> 3. Battery problem | ```\(<1,2>\) [IF INTNMBR \(=5\) AND (THANKYOU = 1 or DK_THANK = 1) goto RESPCOOP] [ELSEIF INTNMBR \(=3\) AND (THANKYOU \(=1\) or DK_THANK = 1) AND NUMHOUSE gt 1 goto RESPINFO] [EISEIF INTNMBR \(=3\) AND (THANKYOU \(=1\) or DK_THANK = 1) goto INFOQUAL] [ELSE goto DONE]``` |
| BACK | RESPCOOP | RESPCOOP | How cooperative was this respondent during this interview? <br> 1. Somewhat cooperative <br> 2. Neither cooperative nor uncooperative <br> 3. Somewhat uncooperative <br> 4. Very uncooperative | <1-4> [goto RESPEFF] |
| BACK | RESPEFF | RESPEFF | - How much effort would you say this respondent put into answering the expenditure questions during this interview? <br> 1. A lot of effort (e.g., looked at a lot of bills, read the Information Book, asked clarifying questions) <br> 2. A moderate amount of effort (e.g., looked at a few bills, seemed to skim Information Book) <br> 3. A bare minimum of effort (e.g., gave answers without much apparent thought, no consultation of records or Information Book) | <1-3> [goto EFFCHG] |
| BACK | EFFCHG | EFFCHG | Did the respondent's level of effort increase, decrease, or stay the same during this interview? <br> 1. Increased <br> 2. Decreased <br> 3. Stayed the same <br> 4. Don't know for sure | <1,2> [goto CHGPNT] <br> $<3,4>$ [IF NUMHOUSE gt 1 goto RESPINFO] <br> [ELSE goto DONE] |
| BACK | CHGPNT | CHGPNT | - At about what point(s) in this interview did the respondent's level of effort change? <br> 1. Within the first 15 minutes <br> 2. 15 to 30 minutes into the interview <br> 3. 30 to 45 minutes into the interview <br> 4. 45 to 60 minutes into the interview <br> 5. At a specific section, specify <br> 6. Other, specify | ```<1-4> [IF NUMHOUSE gt 1 goto RESPINFO] [ELSE goto DONE] <5> [goto CHGST_SP] <6> [goto CHG_SP]``` |
| BACK | CHGST_SP | CHGST_SP | Which section? | <1-22> [IF NUMHOUSE gt 1 goto RESPINFO] |


| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | 1. Section 1 General Housing Characteristics <br> 2. Section 2 Rented Living Quarters <br> 3. Section 3 Owned Living Quarters <br> 4. Section 4 Utilities and Fuels for Owned and Rented Properties <br> 5. Section 5 Construction, Repairs, Alterations and Maintenance of Property <br> 6. Section 6 Appliances, Household Equipment, and Other Selected Items <br> 7. Section 7 Household Item Repairs and Service Contracts <br> 8. Section 8 Household Furnishings and Related Household Items <br> 9. Section 9 Clothing <br> 10. Section 10 Rented and Leased Vehicles <br> 11. Section 11 Owned Vehicles <br> 12. Section 12 Vehicle Maintenance, Repair and Operating Expenses <br> 13. Section 13 Non-Health Insurance <br> 14. Section 14 Hospitalization and Health Insurance <br> 15. Section 15 Medical Expenses and Reimbursements <br> 16. Section 16 Educational Expenses <br> 17. Section 17 Subscriptions, Memberships and Entertainment Expenses <br> 18. Section 18 Trips and Vacations <br> 19. Section 19 Miscellaneous Expenses and Contributions <br> 20. Section 20 Expense Patterns for Food, Beverages and Other Selected Items <br> 21. Section 21 Credit Card Balances <br> 22. Section 22 Work Experience and Income | [ELSE goto DONE] |
| BACK | CHG_SP | CHG_SP | - Specify | $<30$ characters> [IF NUMHOUSE gt 1 goto RESPINFO] [ELSE goto DONE] |
| BACK | RESPINFO | RESPINFO | Did the respondent get information from other household members when answering the questions? <br> 1. Yes <br> 2. No <br> 3. Don't Know | <1> [goto OTHSECT] <br> $<2-3>$ [IF INTNMBR = 3 goto INFOQUAL <br> [ELSE goto DONE] |
| BACK | OTHSECT | OTHSECT | For which expenditure categories did other household members provide information? <br> Enter all that apply, separate with commas. <br> 1. Sections 2 and 3 Housing - rent, mortgage, home equity loans <br> 2. Section 4 Utilities/Communications (electricity, heating, telephone, cable, internet) <br> 3. Section 6 Appliances <br> 4. Section 8 Home Furnishings <br> 5. Section 9 Clothing <br> 6. Sections 10, 11, and 12 Vehicle Expenses <br> 7. Sections 13 and 14 Insurance <br> 8. Section 15 Medical/Health Expenses <br> 9. Section 18 Trips and Vacations <br> 10. Section 22 Work Experience and Income | <1-10> [IF INTNMBR = 3 goto INFOQUAL] <br> [ELSE goto DONE] |

Consumer Expenditure Quarterly Survey 2011 Items Booklet

| Section | Tag Name | Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: | :---: |
| BACK | INFOQUAL | INFOQUAL | - How would you rate the quality of the information obtained in this interview? | <1-4> [goto RESPDIFF] |
|  |  |  | 1. Excellent, no problems at all <br> 2. Good, a few problems, but overall quality good <br> 3. Fair, a number of problems, but overall acceptable <br> 4. Poor, many problems, overall quality open to question |  |
| BACK | RESPDIFF | RESPDIFF | - Did the respondent have any difficulty answering any of the questions during this interview? | $\begin{aligned} & \text { <1> [goto DIFFTYPE] } \\ & <2>\text { [goto DONE] } \end{aligned}$ |
|  |  |  | 1. Yes <br> 2. No |  |
| BACK | DIFFTYPE | DIFFTYPE | - What types of difficulty did the respondent seem to have? | <1-5> [goto DIFFSECT] |

> Enter all that apply, separate with commas.

1. Problems remembering the expenditure item
2. Problems remembering the expenditure price
3. Problems remembering the expenditure details (e.g., date, for whom)
4. Problems remembering the expenditur
5. Problems understanding the question
6. Did not know the expenditure information (items, price, or details)


> Enter up to 3, separate with commas.

1. Section 1 General Housing Characteristics
2. Section 2 Rented Living Quarters
. Section 3 Owned Living Quarters
3. Section 4 Utilities and Fuels for Owned and Rented Properties
4. Section 5 Construction, Repairs, Alterations and Maintenance of Property
. Section 5 Construction, Repairs, Alterations and Maintenance of Property
. Section 6 Appliances, Household Equipment, and Other Sela
5. Section 8 Household Furnishings and Related Household Items
6. Section 8 Household
7. Section 9 Clothing
8. Section 10 Rented and Leased Vehicles
9. Section 11 Owned Vehicles
10. Section 12 Vehicle Maintenance, Repair and Operating Expenses
11. Section 13 Non-Health Insurance
12. Section 14 Hospitalization and Health Insurance
13. Section 15 Medical Expenses and Reimbursement
14. Section 16 Educational Expenses
15. Section 17 Subscriptions, Memberships and Entertainment Expenses
16. Section 18 Trips and Vacations
17. Section 19 Miscellaneous Expenses and Contributions

[^0]:    <D,R> [goto ASSESSMT]
    <0-99999999> [IF SPECLCX gt 2200 goto ERR1_SPECLCX]

[^1]:    Now I will ask about expenditures for household item maintenance or repairs and service contracts.

[^2]:    - Read each item on list

[^3]:    - Read each item on list

[^4]:    Description Type Month Amount
    (EDUDESC) (EDSHL_A) (EDMONTHA) (EDEXOXA)

[^5]:    ... Transportation?

[^6]:    1. Africa
    2. Asia
    3. Asia
    4. Australia
    5. Canada
    6. Central America
    . Central Americ
    . Europe
    7. Middle East
    . Middle East
    8. South America
[^7]:    1. $\$ 0-\$ 999$
    2. $\$ 1,000-\$ 1,999$
    3. $\$ 2,000-\$ 2,999$
    4. $\$ 3,000-\$ 3,999$
    5. $\$ 4,000-\$ 4,999$
    6. \$5,000-\$9,999
    7. \$10,000-\$14,999
    8. \$15,000-\$19,999
    9. $\$ 20,000-\$ 29,999$
    10. \$30,000-\$39,999
    11. $\$ 40,000-\$ 49,999$
[^8]:    1. $\$ 0-\$ 999$
    2. $\$ 1,000-\$ 1,999$
    3. $\$ 2,000-\$ 2,999$
    4. $\$ 3,000-\$ 3,999$
    5. $\$ 4,000-\$ 4,999$
