Consumer Expenditure Quarterly Interview Survey July 2016 Specifications

| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
| FRONT | H_PURPOSE | - FREQUENTLY ASKED QUESTIONS <br> 1. What is this survey all about? <br> 2. Who uses this information? What good is it? <br> 3. How is the data collected? How many times will I be interviewed? <br> 4. I hesitate to tell some things about myself, what protection do I have? <br> 5. Is this survey authorized by law? <br> 6. Proceed with the interview | 1: Goto H_PURPOSE1 <br> 2: Goto H_PURPOSE2 <br> 3: Goto H_PURPOSE3 <br> 4: Goto H_PURPOSE4 <br> 5: Goto H_PURPOSE5 <br> 6: Return to interview |
| FRONT | H_PURPOSE1 | WHAT IS THIS SURVEY ALL ABOUT? <br> The Consumer Expenditure Survey collects information from the Nation's households and families on their buying habits (expenditures), income, and characteristics. The strength of the survey is that it allows data users to relate the expenditure and income of consumers to the characteristics of those consumers. <br> 1. Enter 1 to Continue | Return to interview |
| FRONT | H_PURPOSE2 | WHO USES THIS INFORMATION? WHAT GOOD IS IT? <br> Data from the Consumer Expenditure Survey are used in a number of different ways by a variety of users. An important use of the survey by the Bureau of Labor Statistics is for the periodic revisions of the Consumer Price Index (CPI). Survey results are used to select new market basket of goods and services for the CPI, to determine the relative importance of CPI components and to derive new cost weights for the market basket. Government and private agencies use the data to study the welfare of particular segments of the population. Economic policymakers use the data to study the impact of policy changes in the welfare of different socioeconomic groups. Researchers use the data in a variety of studies, including those that focus on the spending behavior of different family types and historical spending trends. <br> 1. Enter 1 to Continue | Return to interview |
| FRONT | H_PURPOSE3 | HOW IS THE DATA COLLECTED? HOW MANY TIMES WILL I BE INTERVIEWED? <br> ^H_PURPOSE3 <br> 1. Enter 1 to Continue | Return to interview |

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| FRONT | H_PURPOSE4 | I HESITATE TO TELL SOME THINGS ABOUT MYSELF. WHAT PROTECTION DO I HAVE? | Return to interview |
|  |  | The information that respondents provide is used solely for statistical purposes. All Census Bureau data collectors take an oath of confidentiality and are subject to fines and imprisonment for improperly disclosing information provided by respondents. Names and addresses are removed from all forms and that information is not released as part of any statistical data. |  |
|  |  | 1. Enter 1 to Continue |  |
| FRONT | H_PURPOSE5 | - IS THIS SURVEY AUTHORIZED BY LAW? | Return to interview |
|  |  | The Bureau of Labor Statistics conducts the Consumer Expenditure Survey under the authority of Title 29 of the U.S. Code. Congress authorizes the financial support for the CE survey through Public Laws 94-439 and 95-205. The Bureau of the Census collects the CE data under the authority of Title 13, U.S. Code, Section 8b, which allows the Census Bureau to undertake surveys for other government agencies. Participation in the survey is voluntary. Under Title 13, the Census Bureau holds all information in strict confidence. We will not release information reported in the survey which would permit the identification of a household or any of its members to anyone outside of the Census Bureau. |  |
|  |  | 1. Enter 1 to Continue |  |
| FRONT | START | CENSUS CATI/CAPI SYSTEM | 1: IF INTNMBR = 1 then goto GENINTRO ELSE goto SHOSTAT |
|  |  | CONSUMER EXPENDITURE SURVEYS QUARTERLY INTERVIEW SURVEY | 2: Goto GENINTRO |
|  |  | DATE: (current date) TIME: (time) | 3: exit block and goto BBACK.TRANS |
|  |  | INTERVIEW NUMBER: (1/2/3/4/5) CASE STATUS IS: (case status) | 4: Exit block and goto BBACK.VERIFY_INFO |
|  |  | (THIS HOUSEHOLD IS A CONFIRMED REFUSAL/ ) (Press END to move to the next unanswered item/ ) | 5: exit block and goto BCOVERAGE.NONTYP |

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|  |  | 4. Quit <br> 5. Non-interview |  |
| FRONT | SHOSTAT | (This household was not in sample last quarter. / ) | IF ROSTERNAMEONINPUT = Yes then goto SHOWROS <br> 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) / )``` |  |
|  |  | 1. Enter 1 to Continue |  |
| FRONT | SHOWROS | STATUS OF HOUSEHOLD COMPOSITION | Goto SHOW_NOTES |
|  |  | Resp. LN Name Member Relationship CU Sex Age   <br> $(\mathrm{X} /)_{\text {( }}$ (Line \#) (Name) (Yes/No) (Relationship) ${ }^{\wedge} \mathrm{Cu}(1 / 2)$ (Age) |  |
|  |  | 1. Enter 1 to Continue |  |
| FRONT | SHOW_NOTES | - INFORMATION FROM PREVIOUS QUARTERS INTERVIEW | Goto GENINTRO |
|  |  | PRECHARTS: Press Shift-F8 to view pre-charts |  |
|  |  | BEST TIME TO CALL: ^Besttime1 (best time specify) |  |
|  |  | SUNDAY INTERVIEW: (No Sunday Interview/Sunday interview okay) |  |
|  |  | Language Spoken Last Quarter: (English/Spanish/(specify) ) |  |
|  |  | Use CNTRL-F7 to view case level notes |  |


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|  |  | 1. Enter 1 to Continue |  |
| FRONT | GENINTRO | - Do not read as worded below | 1: IF INTNMBR = 1 AND (RT25.QTYPE = 1, 2 or 3 ) then goto RECVDEBT ELSE goto INTROB <br> 2: Goto GIVE_LETTER <br> 3: Exit block and goto BCOVERAGE.NONTYP |
|  |  | o Identify yourself - show I.D. |  |
|  |  | o (Ask to speak to: (name) / Ask for eligible respondent) If unavailable use Shift-F1 for HH roster. |  |
|  |  | o (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 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. |  |
|  |  | Did you receive our letter? |  |
|  |  | 1. Yes |  |
|  |  | 2. No |  |
|  |  | 3. Non-interview |  |
| FRONT | GIVE_LETTER | - Hand the respondent the letter. | IF INTNMBR = 1 AND (RT25.QTYPE = 1, 2 or 3 ) then goto RECVDEBT |
|  |  | Allow time to read | ELSE goto INTROB |
|  |  | 1. Enter 1 to Continue |  |
| FRONT | RECVDEBT | ^RECVDEBT_Fill <br> (Did (READ NAMES) receive a debit card?/Did anyone living at this address receive the debit card?) | $\begin{aligned} & \text { 1,RF: Goto INTROB } \\ & \text { 2,DK: Goto NOTRCV40 } \end{aligned}$ |
|  |  | (FNAME and LNAME of all persons on the roster) |  |
|  |  | 1. Yes <br> 2. No |  |
| FRONT | NOTRCV40 | I'm sorry that you did not receive the debit card. Upon completion of the interview, we will send you another card in the amount of $\$ 40$ as soon as possible. If you also receive the original card we sent, please destroy it since we will be deactivating it. | Goto RCRDNM40 |


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| 1. Enter 1 to Continue |  |  |  |
| FRONT | RCRDNM40 | Who would you like the replacement card addressed to? | GotolNTROB |
| FRONT | INTROB | $\checkmark$ Is Respondent ready to complete the interview? | 1: IF INTNMBR = 2-5 AND [(NEWCU ne 1) or (NEWCU $=1 \quad$ AND ROSTERNAMEONINPUT $=$ 'Yes')] AND not a replacement case then goto |
|  |  | 1. Continue | REPLACE_HH <br> ELSE goto VERADD |
|  |  | 2. Reluctant Respondent |  |
|  |  | 3. Non-interview |  |
|  |  | 4. Other Outcome | 3: exit block and goto BCOVERAGE.NONTYP |
|  |  | 5. Wrong address | 2,4: Exit block and goto BBACK.VERIFY_INFO |
|  |  | 6. Inconvenient time |  |
|  |  |  | 5: Exit block and goto BBACK.DONE |
|  |  |  | 6: Exit block and goto BBACK.APPTOTH |
| FRONT | REPLACE_HH | - Is this a Replacement Household? | 1: Goto REPLACE_VER |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ | 2: Goto VERADD |
| FRONT | 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? | 1: IF RT8500.TOTALCU $=1$ then goto ONE_CU ELSE goto REPLACE_VER2 |
|  |  | (This case is part of a multi-CU household. Verify that ALL original members in all CU's no longer live there. / ) | 2: Goto CK_REPLACEVER |
|  |  | LN Name Member Relationship CU Sex Age (Line \#) (Name) (Yes/No) (Relationship) ${ }^{\wedge} \mathrm{Cu}(1 / 2)$ (Age) |  |
|  |  | 1. Yes 2. No |  |
| FRONT | 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. | 1 Exit block and goto BBACK.DONE |
|  |  |  | 2: Goto MULTI_CU |
|  |  | 1. Yes 2. No |  |


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| FRONT | ONE_CU | * A replacement household Case will be spawned. | Exit block and goto BBACK.DONE |
|  |  | You will need to exit this case and pull up the new Case in order to interview the replacement household. |  |
|  |  | The case you are currently in will automatically become a type C. |  |
|  |  | 1. Enter 1 to Continue |  |
| FRONT | MULTI_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. | Exit block and goto BBACK.DONE |
|  |  | This case is part of a Multi-CU Address. |  |
|  |  | The case you are currently in will automatically become a type $C$, <br> But you MUST manually Type C all other Cases. (There are (Total number of CUs from last quarter) cases <br> that must be Type C'd) If you do not have all these cases on your laptop, contact your supervisor so that the other cases can be located and Type C'd. |  |
|  |  | 1. Enter 1 to Continue |  |
| FRONT | VERADD | (* Confirm address information (Only ask if necessary) ) | 1: Goto MAILAD |
|  |  | I have your address listed as READ ADDRESS BELOW. Is that your exact address? | 2: Goto NADDST1 |
|  |  |  (House \#) (House \#)SUF (Street Name) <br> (City), (State) (Zipcode) <br> (Unit Designation)  <br> (House \#) (House \#)SUF (Street Name) (Unit Designation) (City), (State) (Zipcode) <br> Phy des: (Physical Description) <br> GQ unit: (GQ Unit Description) Non-City: (Non-city address) <br> Building: (Building Name) | 3,RF: Goto DONE |
|  |  | 1. Yes, address is EXACTLY CORRECT as listed. <br> 2. Address is MOSTLY CORRECT, needs minor changes. <br> 3. INCORRECT ADDRESS |  |
| FRONT | 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) | Goto NADDST2 |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | Phy des: (Physical Description) <br> GQ unit: (GQ Unit Description) <br> Non-City: (Non-city address) <br> Building: (Building Name) |  |
| FRONT | 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) | Goto NADDST3 |
| FRONT | 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) | Goto NADDST4 |
| FRONT | 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) | IF FRAME $=3$ or RT25.GQINAREA $=1$ then goto NADDST5 <br> ELSE goto NADDST6 |
| FRONT | NADDST5 | Enter corrections for Group Quarters Unit 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) | Goto NADDST6 |
| FRONT | NADDST6 | - Enter corrections for Non City Style Address or Press ENTER for Same/No Change | Goto NADDPHYS |



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|  |  | Non-City: (Non-city address) Building: (Building Name) |  |
| FRONT | NADDBUIL | Enter corrections for Building 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) | Goto CK_ADDRESS |
| FRONT | MAILAD | (Is this also your mailing address?/I have your mailing address as *READ ADDRESS BELOW. Is that correct?) <br> (Mailing address entries / physical address entries) <br> 1. Yes <br> 2. No | 1: Goto PHONENUM <br> 2: Goto NMAILST1 |
| FRONT | NMAILST1 | Enter change to Mailing address - House \# or Press ENTER for Same/No Change | Goto NMAILST2 |
| FRONT | NMAILST2 | Enter change to Mailing address - House \# suffix or Press ENTER for Same/No Change | Goto NMAILST3 |
| FRONT | NMAILST3 | - Enter change to Mailing address - Street Name or Press ENTER for Same/No Change | Goto NMAILST4 |


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|  |  |  |  |
| FRONT | NMAILST4 | Enter change to Mailing address - Unit Designation or Press ENTER for Same/No Change | IF FRAME $=3$ OR RT25.GQINAREA $=1$ then goto NMAILST5 <br> ELSE goto NMAILST6 |
| FRONT | NMAILST5 | Enter change to Mailing address - GQ Unit Description or Press ENTER for Same/No Change | Goto NMAILST6 |
| FRONT | NMAILST6 | Enter change to Mailing address - Non-City Style Address or Press ENTER for Same/No Change | goto NMAILCT |



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| :---: | :---: | :---: | :---: |
|  |  | - Enter phone number or 0 for None |  |
| FRONT | EMAILADDRESS | - Ask or verify, if necessary | Exit block and goto BCOVERAGE |
|  |  | Can I have your e-mail address? |  |
|  |  | - Enter E-Mail or press ENTER for None/Same |  |
| COVERA GE | NONTYP | - What type of non-interview do you have? | 1: Goto TYPEA |
|  |  |  |  |
|  |  |  | 2: Goto TYPEB |
|  |  | Type A = No one home, Temporarily absent, or refusal | Goto TYPE |
|  |  | Type B = Vacant, under construction, occupied by persons with URE |  |
|  |  | Type C = Demolished, house moved, merged, condemned, located on base, CU moved |  |
|  |  | 1. TYPE A |  |
|  |  | 2. TYPE B |  |
|  |  | 3. TYPE C |  |
| COVERA GE | TYPEA | - Enter TYPE A noninterview | 1,2: IF RT2501.URRAL = R and (RT2501.FRAME ne 3 |
|  |  |  | or RT2501.GQTYPE $=901$ or 903) AND (REPLACE $=1$ |
|  |  |  | or ( (INTNMBR = 1 or NEWCU = 1) AND NEWUNIT ne |
|  |  | 1. No one home <br> 2. Temporarily Absent <br> 3. Refused <br> 4. Other Type A -specify | S) then goto FM_SALES |
|  |  |  | ELSEIF ( (INTNMBR = 1 or _NEWCU_ = 1) and |
|  |  |  | NEWUNIT ne S) then goto GQ_UNIT |
|  |  |  | ELSE goto RACETYP |
|  |  |  | 3: Goto REF_RSN <br> 4: goto TYPEASP |
| COVERA GE | TYPEASP | - Specify other TYPE A | 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) then goto FM_SALES |
|  |  |  | ELSEIF ( (INTNMBR = 1 or _NEWCU_ = 1 ) and NEWUNIT ne S) then goto GQ_UNIT |
|  |  |  | ELSE goto RACETYP |
| COVERA GE | REF_RSN | - Enter type of refusal | 1-3: IF RT2501.URRAL = R and (RT2501.FRAME ne 3 or RT2501.GQTYPE $=901$ or 902) AND (REPLACE $=1$ |


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|  |  | 1. Hostile Respondent <br> 2. Time Related Excuses <br> 3. Language Problems <br> 4. Other Refusal - specify | or ( (INTNMBR = 1 or _NEWCU_ = 1) AND NEWUNIT ne S) then goto FM_SALES <br> ELSEIF ( (INTNMBR = 1 or _NEWCU_ = 1) and NEWUNIT ne S) then goto GQ_UNIT ELSE goto RACETYP |
| COVERA GE | REASON_S | - Specify type of refusal | 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) then goto FM_- |
|  |  |  | ELSEIF ( (INTNMBR = 1 or _NEWCU_ = 1) and NEWUNIT ne S) then goto GQ_UNIT |
|  |  |  | ELSE goto RACETYP |
| COVERA GE | TYPEB | - Enter TYPE B noninterview | 1,2,4-7: IF ( (INTNMBR = 1 or _NEWCU_ = 1) and NEWUNIT ne S) then goto GQ_UNIT <br> ELSE goto BCONTACT.BYOBS |
|  |  | 1. Vacant (for rent) |  |
|  |  | 2. Vacant (for sale) | 3: Goto VACANT_S |
|  |  | 4. Occupied by persons with URE | 8,9: Goto BCONTACT.BYOBS |
|  |  | 5. Under construction, not ready |  |
|  |  | 6. All persons under 16 | 10: Goto TYPEB_SP |
|  |  | 7. Unfit or to be demolished |  |
|  |  | 8. Unoccupied tent or trailer site |  |
|  |  | 9. Permit granted, construction not started |  |
| COVERA GE | TYPEB_SP | - Specify other TYPE B | IF ((INTNMBR = 1 or_NEWCU_ = 1) and NEWUNIT ne S) then goto GQ_UNIT |
|  |  |  | ELSE goto BCONTACT.BYOBS |
| COVERA GE | VACANT_S | * Specify type of vacant | IF ((INTNMBR = 1 or_NEWCU_ = 1) and NEWUNIT ne S) then goto GQ_UNIT |
|  |  |  | ELSE goto BCONTACT.BYOBS |
| COVERA GE | TYPEC | - Enter TYPE C noninterview | 1,2,4-6,8-9: Goto BContact.BYOBS |
|  |  | 1. Demolished | 3,7,10,12: Goto END_COVERAGE |


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|  |  | 3. Converted to permanent nonresidential use <br> 4. Merged with units in the same structure <br> 5. Condemned <br> 6. Located on military base (post) <br> 7. Unused serial \# on listing sheet <br> 8. CU moved <br> 9. CU merged with another CE CU within same address <br> 10. Spawned in error <br> 11. Unlocatable Sample Address <br> 12. Unit does not exist or Unit is out of scope <br> 13. Other type C - specify | 11: goto END_COVERAGE <br> 13: Goto TYPEC_SP |
| COVERA GE | TYPEC_SP | - Specify other TYPE C | Goto BContact.BYOBS |
| COVERA GE | FM_SALES | During the past 12 months did sales of crops, livestock, and other farm products from this place amount to $\mathbf{\$ 1 , 0 0 0}$ or more? | Goto GQ_UNIT |
|  |  | 1. Yes <br> 2. No |  |
| COVERA GE | GQ_UNIT | - Indicate if the unit is: | 1: Goto HUTYPE |
|  |  | 1. In a Group Quarters <br> 2. NOT in a Group Quarters | 2,DK: IF FRAME ne 3 then goto DIRACC ELSE goto HUTYPE |
| COVERA GE | DIRACC | - Indicate if access to the household is: | 1: Goto HUTYPE |
|  |  | 1. Direct <br> 2. Through another unit | 2,DK: Goto MERGUA |
| COVERA GE | MERGUA | ? [F1] <br> Is this a merged unit? | 1,DK: Goto HUTYPE |
|  |  | 1. Merged <br> 2. Not Merged |  |
| COVERA GE | HUTYPE | Enter type of Housing Unit. | 1-6,8,9,DK: Goto UNISTRQ |
|  |  | 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 | 7,10: IF TYPEB ne 8 then goto HUTYPESP ELSE goto UNISTRQ |


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|  |  | 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 |  |
| COVERA GE | HUTYPESP | - Enter other type of housing unit | Goto UNISTRQ |
| COVERA GE | UNISTRQ | - Ask if not apparent | IF NONTYPE $=2$ (type b) then goto BYOBS ELSEIF NONTYP = 1 then goto RACETYP |
|  |  | 1. Only Group Quarters units <br> 2. Mobile home or trailer <br> 3. One, detached <br> 4. One, attached <br> 5. 2 <br> 6. 3-4 <br> 7. 5-9 <br> 8. 10-19 <br> 9. 20-49 <br> 10. 50 or more |  |
| COVERA GE | BYOBS | - Did you classify this unit by observation only? | 1: Exit block and goto END_COVERAGE |
|  |  | PREVIOUS OBSERVATION: (YES/NO) | 2: Goto CP1NAME |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| COVERA GE | CP1NAME | - Enter contact person name | Goto CP1TITL |
|  |  | PREVIOUS NAME: (Previous Contact Persons Name) |  |
| COVERA GE | CP1TITL | Enter contact person title <br> Press enter if no change is needed | Goto PHON |
|  |  | PREVIOUS TITLE: (Title) |  |
| COVERA | PHON | - Enter contact person phone number and extension | goto CP1ADD1 |

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| GE |  |  |  |
|  |  | Press enter if no change is needed |  |
|  |  | ```PREVIOUS ADDRESS: (Previous address) (previous address - 2nd line) (Previous city) (previous state) (previous zipcode) - (previous``` |  |
|  |  | zipcode extension) |  |
| COVERA GE | RACETYP | - The items below are required information for all TYPE A cases. | Goto HH_MEMQ |
|  |  | Race code |  |
|  |  | 1. White |  |
|  |  | 2. Black or African American |  |
|  |  | 3. American Indian or Alaska native |  |
|  |  | 4. Asian |  |
|  |  | 5. Native Hawaiian |  |
|  |  | 6. Guamanian or Chamorro |  |
|  |  | 7. Samoan |  |
|  |  | 8. Other Pacific Islander |  |
|  |  | 9. Other |  |
| COVERA GE | HH_MEMQ | - The items below are required information for all TYPE A cases. | Goto TENURE |
|  |  | Number of household members: |  |
| COVERA GE | TENURE | - The items below are required information for all TYPE A cases. | 1,2: Goto HHQSRCE |
|  |  | Tenure code | DK,RF: Goto BUILD_A |
|  |  | 1. Owned <br> 2. Rented |  |
| COVERA GE | BUILD_A | Which best describes this building? | Goto HHQSRCE |
|  |  | 1. Single family detached |  |
|  |  | 2. Townhouse - inner unit |  |
|  |  | 3. End row or end townhouse |  |
|  |  | 4. Duplex |  |
|  |  | 5. 3-plex or 4-plex |  |
|  |  | 6. Garden |  |
|  |  | 7. High-rise |  |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 8. Apartment or flat <br> 9. Mobile home or trailer <br> 10. College dormitory |  |
| COVERA GE | HHQSRCE | What was the source of the information for the household characteristics? <br> Enter all that apply, separate with commas <br> 1. Observation <br> 2. Neighbor <br> 3. Building Manager <br> 4. Other (Specify) | 1-3: IF TYPE A (outcome is 321-324) then goto REF_SEX <br> ELSE goto END_COVERAGE <br> 4: Goto HHQ_SP |
| $\begin{aligned} & \text { COVERA } \\ & \text { GE } \end{aligned}$ | HHQ_SPECIFY | - Specify other source of information | IF Type A (outcome is 321-324) then goto REF_SEX ELSE goto END_COVERAGE |
| COVERA GE | REF_SEX | - Provide the characteristics of the individual who refused to participate. <br> Sex of individual <br> 1. Male <br> 2. Female | Goto REF_RACE |
| COVERA GE | REF_RACE | Provide the characteristics of the individual who refused to participate. <br> Race of individual <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 | Goto REF_AGED |
| COVERA GE | REF_AGED | Provide the characteristics of the individual who refused to participate. | Goto END_COVERAGE |

Section CAPI Variable Name Question Text Skip Instruction

Approximate age of individual

|  | 1. Under 20 <br> 2. 21 - 50 <br> 3. 51-74 <br> 4. 75 or older |  |
| :---: | :---: | :---: |
| DEMOGR STLLIV | I have listed . . . READ NAMES | Goto TUNIT1 Block - PERSTAT |
| APHICS | $\wedge$ These_this (person/people) still living or staying here? |  |
|  | (This case is part of a Multi-CU address. There are (number) CU's for this address) |  |
|  | (Lis tof persons in the household) |  |


|  | 1. Yes |  |
| :--- | :--- | :--- |
|  | 2. No |  |
| DEMOGR | PERSTAT | (Use up/down arrows to move to the correct row for membership change. When done, |

APHICS
REVIEW/Update demographics. Press END key./Use left/right arrows to


What is (your/NAME's) relationship to (you/the owner/renter/name of reference person)?

- If this is the Reference Person, enter 1
(The Reference person is one of the persons who owns or rents this home.)

1. Reference person
2. Spouse (Husband/Wife)

| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 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 |  |
| DEMOGR APHICS | SEX | Ask if not apparent Is ^NAME male or female? | 1,DK,RF: Goto AWAY_COL <br> 2: goto AWAY_COL |
|  |  | 1. Male <br> 2. Female |  |
| DEMOGR APHICS | AWAY_COL | Ask if not apparent <br> Is ^NAME living away at college? | 1: IF CU_CODE = 1 then goto CK_AWAYCOL ELSE goto HH_MEM |
|  |  |  | 2,DK,RF,EMPTY: Goto HH_MEM |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| DEMOGR APHICS | HH_MEM | Does ^NAME usually live here? <br> - Probe if usual place of residence is elsewhere. | 1,DK,RF,EMPTY: Goto next line of grid <br> 2: goto next line of grid |
|  |  | 1. Yes 2. No |  |
| DEMOGR <br> APHICS | HHRESP | Ask if necessary <br> With whom am I speaking? | IF ((INTNMBR = 1 or NEWCU = 1) and NEWUNIT ne 5) OR REPLACE $=1$ AND NROSIZE less than 30 then goto MLIVE |
|  |  | Enter line number <br> 1. NAME[1] <br> 2. NAME[2] <br> 3. NAME[3] <br> 4. NAME[4] <br> 5. NAME[5] | ELSEIF ((INTNMBR = 1 or NEWCU $=1$ ) and NEWUNIT ne 5) OR REPLACE $=1$ AND NROSIZE eq 30 then exit block and goto BSUBFAMILY, BSFMAKEUP or TUNIT2 as appropriate <br> ELSE goto NEWLIV |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 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 |  |
| DEMOGR <br> APHICS | MLIVE | So I have listed (Number of people in the household) (person/people) living or staying here now. <br> (Lis tof persons in the household) <br> Is there anyone else living or staying here now - any babies, small children, non-relatives or anyone else? <br> - Please verify that the information on this screen is correct. <br> 1. Yes <br> 2. No | 1: Go back to where FNAME $=999$ <br> 2,DK,RF: Exit block and goto BSUBFAMILY, BSFMAKEUP or TUNIT2 as appropriate |
| DEMOGR APHICS | NEWLIV | Is anyone else living or staying here, including newborn babies? <br> (Lis tof persons in the household) | 1: $\quad$ Go back to where FNAME $=999$ <br> 2: Exit block and goto BSUBFAMILY, BSFMAKEUP |


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


|  | 1. Yes, add new person <br> 2. No |  |  |
| :--- | :--- | :--- | :--- |
| DEMOGR <br> APHICS | SUBFAM1 | Earlier you said that ^NAME was <br> not related to (Name of reference person). <br> Is $\wedge$ NAME related to anyone else in this household? | 1: |

1. ^NAME[1]
2. ^NAME[2]
3. ^NAME[3]
4. $\left.{ }^{\text {NAME }} 44\right]$
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[20 21. NAME[21] 22. NAME[22 23. ^NAME[23]
22. ^NAME[24]

| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 25. ^NAME[25] <br> 26. ^NAME[26] <br> 27. ^NAME[27] <br> 28. ^NAME[28] <br> 29. ^NAME[29] <br> 30. ^NAME[30] |  |
| DEMOGR <br> APHICS | SHELTX | (Begin financial responsibility questions to determine CU's) <br> (Do/Does) (READ NAMES) pay for all ^yourhishertheir housing expenses with ^yourhishertheir own money? <br> (subfamily names) | Goto FOODX |
|  |  | 1. Yes <br> 2. No |  |
| DEMOGR APHICS | FOODX | (Do/Does) (READ NAMES) pay for all (your/his/her/their) food expenses with (your/his/her/their) own money? <br> (subfamily names) | 1: IF SHELTX = 1 and there are no more subfams then goto UPDATE_SUBFAM <br> ELSEIF SHELTX = 1 then goto SHELTX for next subfam <br> ELSE goto OTHERX |
|  |  | 1. Yes 2. No | 2,DK,RF: Goto OTHERX |
| DEMOGR APHICS | OTHERX | (Do/Does) (READ NAMES) pay for all (your/his/her/their) other living expenses such as clothing, transportation, etc., with (your/his/her/their) own money? <br> (subfamily names) | 1: IF SHELTX = 1 OR FOODX = 1 AND there are no more subfamiles then goto UPDATE_SUBFAM <br> ELSEIF SHELTX = 1 OR FOODX = 1 then goto <br> SHELTX for next subfamily <br> ELSE goto SUPSRC |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & 2 \mathrm{No} \end{aligned}$ | 2,DK,RF: Goto SUPSRC |
| DEMOGR APHICS | SUPSRC | Does all or part of the money to pay for (READ NAMES) ^description come from someone in this household? <br> (subfamily names) | 1: Goto SUPRT1 <br> 2,DK,RF: IF no more subfamilies then goto <br> UPDATE_SUBFAM <br> ELSE goto SHELTX for next subfamily |
|  |  | 1. Yes <br> 2. No |  |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
| DEMOGR APHICS | SUPRT1 | Who is that person(s)? | IF no more subfamilies then goto UPDATE_SUBFAM |
|  |  | Enter line number(s), separate with commas | ELSE goto SHELTX for next subfamily |
|  |  | 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] |  |
|  |  | 24. ^NAME[24] |  |
|  |  | 25. ^NAME[25] |  |
|  |  | 26. ^NAME[26] |  |
|  |  | 27. ^NAME[27] |  |
|  |  | 28. ^NAME[28] |  |
|  |  | 29. ^NAME[29] |  |
|  |  | 30. ^NAME[30] |  |
| DEMOGR | CONSUMER_UNITS | * HOUSEHOLD MEMBERS BROKEN INTO APPROPRIATE CU'S | Goto CU_INTRO |
|  |  | (List CU\#, Line number, and name) |  |
|  |  | 1. Enter 1 to Continue |  |
| DEMOGR APHICS | 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 | Goto TUNIT2 block |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | expenses. <br> A "household" is considered one Consumer Unit <br> The (person/ persons) I'm including in your household (arelis) (READ NAME(S)) (Names of Cu members) <br> 1. Enter 1 to Continue |  |
| DEMOGR APHICS | AGE1 | As of today, how old (arelis) (You/NAME)? | DK,RF: Goto AGE2 <br> 0-109: IF AGE $=13,15,61$ or 64 then goto AGESPEC ELSE goto HORIGIN <br> 110-200: Goto CK AGE1 |
| DEMOGR <br> APHICS | AGESPEC | Some questions are only asked for household members of a certain age. <br> 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) | IF before current month and year then goto VERIFY_AGE <br> ELSE goto HORIGIN |
| DEMOGR APHICS | AGE2 | Ask if necessary <br> (Are/ls) (you/he/she) under 16? <br> 1. Yes <br> 2. No | Goto HORIGIN |
| DEMOGR <br> APHICS | HORIGIN | [12 2 <br> (Are/ls) (You/NAME) Hispanic, Latino, or Spanish? <br> 1. Yes <br> 2. No | 1: Goto HISPANIC <br> 2,DK,RF: Goto MULTRACE |
| DEMOGR APHICS | HISPANIC | [12 2 <br> (Arells) (You/NAME) - | 1-5,DK,RF: Goto MULTRACE <br> 6: Goto HISPOTH |


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

- Examples of "other" include - Argentinean, Colombian, Dominican, Nicaraguan, Salvadoran,

Spaniard

1. Mexican?
2. Mexican-American?
3. Chicano?
4. Puerto Rican?
5. Cuban?

| 6. Other (Specify) |  |  |  |
| :---: | :---: | :---: | :---: |
| DEMOGR APHICS | HISPOTH | - Specify: | Goto MULTRACE |
| DEMOGR APHICS | MULTRACE | $\text { KH } 2$ | 1-3,5,8,10,RF: IF AGE ge 14 OR AGERNG $=8$ or 9 then goto MARITAL |
|  |  | What is (your/NAME's) race? | ELSE goto Next Person |
|  |  | - Probe if necessary | 4: Goto ASIAN |
|  |  | - Enter all that apply, separate with commas <br> - Examples of "Other Pacific Islander" include - Fijian, Tongan | 9: Goto RACESP |
|  |  | 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 |  |
| DEMOGR APHICS | ASIAN | $\text { CH } 2$ | 1-6,DK,RF: IF AGE ge 14 OR (AGERNG = 8 or 9 ) then goto MARITAL <br> ELSE goto Next Person |
|  |  | (Are/ls) (You/NAME) - <br> - Examples of "other" include - Hmong, Laotian, Thai, Pakistani, Cambodian | 7: Goto ASIANOTH |



| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 1. Full-time? <br> 2. Part-time? <br> 3. Not at all? | ELSE goto next member |
| DEMOGR APHICS | ARM_FORC | [EH 3 ? [F1] <br> (Are/ls) (You/NAME) now in the Armed Forces? | IF this is the last person then goto CHECKS2 ELSE goto the next person |
|  |  | 1. Yes <br> 2. No |  |
| DEMOGR APHICS | DEBT40 | After completing the last interview in (reference month), we gave you the PIN for a \$40 debit card. Did you have any problems using that card? | IF (DEBT40[1]=0, 1, 2 or 9 ) and (DEBT40[2] = 0-11 then goto CK DEBT40 |
|  |  | - Enter all that apply, separate with commas | ELSEIF ANY DEBT40[2-8] = 0, 1, 2 or 9 then goto CK_DEBT40 |
|  |  | 0. No problems |  |
|  |  | 1. Have not received the card <br> 2. Have not used the card | ELSEIF 10 selected then goto DEBT40SP |
|  |  | 3. ATM did not accept the debit card <br> 4. Store did not accept the debit card | ELSEIF 8500.PIN_FLAG $=1$ then goto DEBT20 |
|  |  | 5. Forgot PIN | ELSE goto CEINTRO |
|  |  | 6. PIN did not work |  |
|  |  | 7. Instructions were not clear |  |
|  |  | 8. Instructions were lost |  |
|  |  | 9. Lost or misplaced debit card |  |
|  |  | 10. Other - specify <br> 11. Don't know |  |
| DEMOGR APHICS | DEBT40SP | - Specify | IF 8500.PIN_FLAG $=1$ then goto DEBT20 |
|  |  |  | ELSE goto CEINTRO |
| DEMOGR <br> APHICS | DEBT20 | After the last interview in (reference month), we sent you a debit card for $\$ 20$. Did you have any problems using that card? | $\begin{aligned} & \text { IF (DEBT20[1]=0, 1, } 2 \text { or } 9) \text { and (DEBT20[2] }=0-11 \\ & \text { then goto CK_DEBT20 } \end{aligned}$ |
|  |  | - Enter all that apply, separate with commas | ELSEIF ANY DEBT20[2-8] = 0, 1, 2 or 9 then goto CK_DEBT20 |
|  |  | 0. No problems |  |
|  |  | 1. Have not received the card | ELSEIF 10 selected then goto DEBT20SP |
|  |  | 2. Have not used the card |  |
|  |  | 3. ATM did not accept the debit card <br> 4. Store did not accept the debit card | ELSEIF 1 or 9 is selected then goto NOTRCV20 |

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| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 5. Forgot PIN | ELSE goto CEINTRO |
|  |  | 6. PIN did not work |  |
|  |  | 7. Instructions were not clear |  |
|  |  | 8. Instructions were lost |  |
|  |  | 9. Lost or misplaced debit card |  |
|  |  | 10. Other - specify |  |
|  |  | 11. Don't know |  |
| DEMOGR APHICS | DEBT20SP | - Specify | Goto CEINTRO |
| DEMOGR <br> APHICS | NOTRCV20 | I'm sorry that (the original debit card we sent you was misplaced/you have not received the card). We will send you a replacement card in the amount of $\$ 20$ as soon as possible. If the original card (arrives/is found), please destroy it since we will be deactivating it. | Goto RCRDNM20 |
|  |  | 1. Enter 1 to Continue |  |
| DEMOGR APHICS | RCRDNM20 | Who would you like the replacement card addressed to? | Goto CEINTRO |
| DEMOGR APHICS | CE_INTRO | As we start, please understand that we ask the same topics of everybody we talk to. I realize some of these questions may not apply to your household. | Goto BUSCREEN |
|  |  | Most questions that I will be asking refer to a specific time period. |  |
|  |  | During this interview, the time period, unless I state otherwise is for the past three months, that is, from the 1st day of (reference month) to today. |  |
|  |  | 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 do not include any purchases made with the debit (card/cards) we have sent you.) |  |
|  |  | 1. Enter 1 to Continue |  |
| DEMOGR APHICS | BUSCREEN | Since the first of (reference month), have (youlyou or any members of your household) had any expenses that will be reimbursed or deducted as business expenses? | 1,DK,RF: Goto BUSXPNSE |
|  |  |  | 2: Exit block and goto BSECT01 |
|  |  | 1. Yes <br> 2. No |  |
| DEMOGR APHICS | BUSXPNSE | For certain topics, such as housing, utilities, or vehicles, I will ask you to estimate how much of the expense was or will be deducted as a business expense. | Exit block and goto BSECT01 |
|  |  | 1. Enter 1 to Continue |  |
| 01B | ST_HOUS | - Ask if not apparent. | IF COVERAGE.UNISTRQ = 2 or 3 OR (8500.UNISTRQ |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | Are these living quarters presently used as student housing by a college or university? | $=2$ or 3 ) then goto ROOMSQ <br> ELSE goto BUILDING |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 01B | BUILDING | [1] 4 ? [F1] | 1-9,DK,RF: Goto ROOMSQ |
|  |  | - Ask if not apparent by observation | 10: goto S1B_END |
|  |  | Which best describes this building? | 11: Goto BUILDOTH |
|  |  | 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 |  |
| 01B | BUILDOTH | - Specify: | Goto ROOMSQ |
| 01B | ROOMSQ | How many ROOMS are there in this unit, including all finished living areas and excluding all bathrooms? | 1-30,DK,RF: Goto BEDROOMQ |
|  |  |  | 31-99: Goto ERR1_ROOMSQ |
| 01B | BEDROOMQ | How many BEDROOMS are there in this unit? <br> Count all rooms used mainly for sleeping, even if also used for other purposes. | Goto BATHRMQ |
| 01B | 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. | Goto HLFBATHQ |
| 01B | HLFBATHQ | How many HALF bathrooms are there in this unit? <br> A half bathroom has at least a toilet or bathtub or shower, but does not have all the facilities of a complete bathroom. | Goto S1B_END |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
| 02 | STLRENT | Last time (youlyour household) reported renting these living quarters. Do you still rent? | 1,DK,RF: Goto RENTED |
|  |  |  | 2: Goto RTASPAY |
|  |  | 1. Yes | 3: IF 8500.UNITFEAT = EMPTY then goto |
|  |  | 2. No | UNITFEAT |
|  |  | 3. No -Buying the sample unit | ELSEIF 8500.YRBUILT = EMPTY then goto YRBUILT <br> ELSE exit block and goto Section 3 |
| 02 | OWNED | Do you own this home? | 1: IF 8500.UNITFEAT = EMPTY then goto UNITFEAT |
|  |  | - Include households with mortgages as owners. | ELSEIF 8500.YRBUILT = EMPTY then goto YRBUILT <br> ELSE exit block and goto Section 3 |
|  |  | 1. Yes |  |
|  |  | 2. No | 2,DK,RF: Goto PUBLHOUS |
| 02 | UNITFEAT | [1] 6 ? [F1] | IF 8500.YRBUILT = EMPTY then goto YRBUILT ELSE exit block and goto Section 3 |
|  |  | Does this unit have any of the following? |  |
|  |  | - Enter all that apply, separate with commas |  |
|  |  | 0. None |  |
|  |  | 1. Swimming Pool |  |
|  |  | 2. Off Street Parking |  |
|  |  | 3. Porch, terrace, patio, or balcony |  |
|  |  | 4. Apartment or guest house |  |
|  |  | 5. Central air conditioning |  |
|  |  | 6. Window air conditioning |  |
|  |  | 77. Don't know |  |
| 02 | YRBUILT | About when was this building originally built? | Goto Section 3 |
|  |  | Do not consider later remodelings Probe for best estimate |  |
| 02 | PUBLHOUS | - Ask if not apparent. | $\begin{aligned} & \text { 1: IF } 8500 . I N C L D R Y R=\text { EMPTY then goto } \\ & \text { INCLSTOV } \end{aligned}$ |
|  |  | Is this house in a public housing project, that is, is it owned by a local housing authority or other local public agency? | ELSE goto RENTED |
|  |  |  | 2,DK,RF: Goto GOVTCOST |


Section CAPI Variable Name Question Text


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
| 02 | RENTX3 | What was your total rental payment for (last month) for this unit? | Goto RTELECT |
| 02 | RTELECT | [15 5 | Goto RTGAS |
|  |  | Does the rental payment include the cost of ... Electricity? |  |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 02 | RTGAS | [1. 5 | Goto RTWATER |
|  |  | - Repeat if necessary <br> Does the rental payment include the cost of - <br> ... . Gas? |  |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 02 | RTWATER | [4] | Goto RTHEAT |
|  |  | Repeat if necessary Does the rental payment include the cost of - <br> . . . Piped in water? |  |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 02 | RTHEAT | [4 5 | Goto RTTRASH |
|  |  | Repeat if necessary Does the rental payment include the cost of .... Heating? |  |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
| 02 | RTTRASH | [4] | Goto RTPARK |
|  |  | - Repeat if necessary Does the rental payment include the cost of - |  |
|  |  | . . Trash/garbage collection? |  |
|  |  | 1. Yes 2. No |  |
| 02 | RTPARK | [4] 5 | Goto RTTELEPH |
|  |  | - Repeat if necessary Does the rental payment include the cost of - |  |
|  |  | ... Garage and parking facilities? |  |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 02 | RTTELEPH | [4] 5 | Goto RTTVCABL |
|  |  | Repeat if necessary <br> Does the rental payment include the cost of - <br> . . . Telephone services? |  |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 02 | RTTVCABL | [4] 5 | Goto RTINTRNT |
|  |  | - Repeat if necessary <br> Does the rental payment include the cost of - <br> . . . Television services? |  |
|  |  | 1. Yes <br> 2. No |  |
| 02 | RTINTRNT | [E] 5 | Goto RTFUNSH |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | - Repeat if necessary |  |
|  |  | Does the rental payment include the cost of - |  |
|  |  | . . . Internet services? |  |
|  |  | 1. Yes <br> 2. No |  |
| 02 | RTFUNSH | [15 | Goto RTASPAY |
|  |  | - Repeat if necessary <br> Does the rental payment include the cost of - |  |
|  |  | . . . Furniture? |  |
|  |  | 1. Yes <br> 2. No |  |
| 02 | RTASPAY | Did (youlyou or any members of your household) receive any reduced or free rent for this unit as a form of pay since the first of (reference month)? | 1: Goto RTCOMPX |
|  |  | 1. Yes <br> 2. No | 2,DK,RF: IF BCeintro.BUSCREEN = 2 AND (PSU=06001, 06013, 06037, 06041, 06059, 06065, 06071, 06081, 06073, 06075, 06087, 06097, 11001, 24021, 24043, 34003, 34013, 34017, 34023, 34027, 34031, 34037, 36005, 36047, 36059, 36061, 36081, 36085, 36087, 36103, 36119) go to RENTCONT |
|  |  |  | ELSEIF BCeintro.BUSCREEN = 2 goto MORERNT |
|  |  |  | ELSE goto RTBSNS |
| 02 | RTCOMPX | What is the current monthly rental charge to another tenant for a similar unit? | Goto REGRNTX |
| 02 | REGRNTX | What is your regular rental payment? | 0-999999: IF BCeintro.BUSCREEN = 2 AND (PSU=06001, 06013, 06037, 06041, 06059, 06065, 06071, 06081, 06073, 06075, 06087, 06097, 11001, 24021, 24043, 34003, 34013, 34017, 34023, 34027, 34031, 34037, 36005, 36047, 36059, 36061, 36081, 36085, 36087, 36103, 36119) go to RENTCONT <br> ELSEIF BCeintro.BUSCREEN $=2$ goto MORERENT <br> ELSE goto RTBSNS |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  |  | $\begin{aligned} & \text { DK,RF: IF BCeintro.BUSCREEN = } 2 \text { AND } \\ & \text { (PSU=06001, 06013, 06037, 06041, 06059, 06065, } \\ & 06071,06081,06073,06075,06087,06097,11001, \\ & 24021,24043,34003,34013,34017,34023,34027, \\ & 34031,34037,36005,36047,36059,36061,36081 \text {, } \\ & 36085,36087,36103,36119) \text { go to RENTCONT } \\ & \text { ELSEIF BCeintro.BUSCREEN = } 2 \text { goto } \\ & \text { MORERENT } \\ & \text { ELSE goto RTBSNS } \end{aligned}$ |
| 02 | RTBSNS | Is any portion of this unit used for your own business? | 1: Goto RTBSNSZ |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ | 2: IF (PSU $=06001,06013,06037,06041,06059$, 06065, 06071, 06073, 06075, 06081, 06087, 06097, 11001, 24021, 24043, 34003, 34013, 34017,34023, 34027, 34031, 34037, 36005, 36047,36059, 36061, 36081, 36085, 36087, 36103, 36119) goto RENTCONT ELSE goto MORERNT |
|  |  |  | DK,RF: IF (PSU $=06001,06013,06037,06041$, 06059, 06065, 06071, 06073, 06075, 06081, 06087, 06097, 11001, 24021, 24043, 34003, 34013, 34017,34023, 34027, 34031, 34037, 36005, 36047,36059, 36061, 36081, 36085, 36087, 36103, 36119) goto RENTCONT <br> ELSE goto MORERNT |
| 02 | RTBSNSZ | What percent of the rental payment is counted as a business expense? <br> - Enter to the nearest whole percent. | IF (PSU = 06001, 06013, 06037, 06041, 06059, 06065, 06071, 06073, 06075, 06081, 06087, 06097, 11001, 24021, 24043, 34003, 34013, 34017, 34023, 34027, 34031, 34037, 36005, 36047, 36059, 36061, 36081, 36085, 36087, 36103,36119), goto RENTCONT ELSE goto MORERNT |
| 02 | RENTCONT | Is this unit under rent control? | Goto MORERNT |
|  |  | 1. Yes <br> 2. No |  |
| 02 | MORERNT | Since the first of (reference month), have (youlyou or any members of your household) rented any other houses, apartments, or temporary living quarters NOT used entirely for business or vacation? | 1: Goto RENTX1 <br> 2,DK,RF: Goto S2_END |


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

$\checkmark$ Do NOT include college or university regulated housing.

## 1. Ye

|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| :---: | :---: | :---: | :---: |
| 03A2 | S3_INTRO | (Now I am going to update the information you provided in the last interview for owned living quarters and other owned real estate./Now I am going to <br> Prop \#\|Description |Type \#\# Mort|\# LSHEL \# LCHEL <br> 1. Enter 1 to Continue | IF INTNMBR = 2-5 AND NEWCU <> 1 then goto BSect3A1 <br> ELSE goto BSect3A2 |
| 03A1 | STILOWN | (DolDoes) (youlyour household) still own your (property description)? <br> Prop \#\|Description |Type |\# Mort|\# LSHEL \# LCHEL <br> 1. Yes <br> 2. No | 1,DK,RF: IF 8500.OWNYB = 600 then exit block and goto BSECT3I.VAC_RNTQ <br> ELSEIF BCeintro.BUSCREEN = 2 AND (there are previously reported loans with 8500.LOANTYPE = 1, 2 AND 8500.OPF_STAT = 1) then exit block and goto BMCHANGE.Mchange <br> ELSEIF BCeintro.BUSCREEN = 2 AND <br> 8500.HWMNYLOC >= 1 then exit block and goto <br> THomeEquity.PDLOAN2 <br> ELSEIF BCeintro.BUSCREEN = 2 exit block and goto TAddMort.ADDMORT <br> ELSE goto BSNSEXPA <br> 2: IF 8500.OWNYB $=600$ then exit block and goto PURPROP <br> ELSEIF BCeintro.BUSCREEN = 2 AND (there are previously reported loans with 8500.LOANTYPE = 1, 2 AND 8500.OPF_STAT = 1) then exit block and goto BMCHANGE.Mchange <br> ELSEIF BCeintro.BUSCREEN = 2 AND <br> 8500.HWMNYLOC >= then exit block and goto <br> THomeEquity.PDLOAN2 <br> ELSEIF BCeintro.BUSCREEN = 2 exit block and goto TAddMort.ADDMORT <br> ELSE goto BSNSEXPA |
| 03A1 | 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 | 1: Goto OBSNSZBA <br> 2,DK,RF: IF there are previously reported loans with 8500.LOANTYPE $=1$, 2 AND 8500.OPF_STAT $=1$ then exit block and goto BMCHANGE.Mchange |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ | ELSEIF 8500.HWMNYLOC >= 1 then exit block and goto THomeEquity.PDLOAN2 <br> ELSE exit block and goto TAddMort.ADDMORT |
| 03A1 | 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,DK,RF: IF there are previously reported loans with 8500.LOANTYP = 1, 2 AND 8500.OPF_STAT $=1$ then exit block and goto BMCHANGE.Mchange <br> ELSEIF 8500.HWMNYLOC >= 1 then exit block and goto THomeEquity.PDLOAN2 <br> ELSE exit block and goto TAddMort.ADDMORT <br> 100: Goto ERR2 OBSNSZBA |
| 03A1 | MCHANGE | ^MCHANGE_FILL <br> 1. Yes <br> 2. No | 1: Goto MORTCHNG <br> 2,DK,RF: IF 8500.Fixedrte $=2$, DK or RF then goto PYMTJX1 <br> ELSEIF 8500.FIXEDRTE $=1$ and there are more loans for this property with 8500.OPF_STAT = 1 then goto MCHANGE for the next loan <br> ELSEIF 8500.HWMNYLOC >= 1 then exit block and goto THomeequity.PDLOAN2 <br> ELSE exit block and goto TAddmort.ADDMORT |
| 03A1 | MORTCHNG | What was the reason for the change in your <br> (mortgage/lump 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 <br> 4. Change in amount of the graduated payment for a graduated payment <br> ^MORTGAGE_LUMPSUM <br> 5. ^MORTGAGE_LUMPSUM_C renegotiated (rollover or renegotiable ^MORTGAGE_LUMPSUM) <br> 6. Refinanced ${ }^{\wedge}$ MORTGAGE_LUMPSUM (this includes changing the term of the <br> ^MORTGAGE_LUMPSUM) <br> 7. Paid less than the required amount <br> 8. Other reasons <br> 9. More than one of the above | 1,4: Goto PYRINIJ <br> 2: Goto NEWMRRTJ <br> 3: Goto MORTCHMO <br> 5,6,8,9,DK,RF: Goto ORWHAT <br> 7: Goto PYMTJX1 |
| 03A1 | ORWHAT | Is this a 30 -year (mortgage/lump sum home equity loan), a 15-year (mortgagellump sum home equity loan), or something else? <br> 1. 30-year | 1,2,DK,RF: Goto FIXEDRTJ <br> 3: Goto MRTTERMJ |

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| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
| 03A1 | PYJOTH | * Specify: | IF (8500.FIXEDRTE $=2$, DK or RF) or (FIXEDRTJ $=2$, DK or RF) then goto MORTCHMO |
|  |  |  | ELSE goto MRTPMTJX |
| 03A1 | MRTPMTJX | How much is (yourlyour household's) (mortgagellump sum home equity loan) payment per month? | IIF any codes 3-6 are selected in PYRINIJ then goto PRININJX |
|  |  |  | ELSE goto MORTCHMO |
| 03A1 | PRININJX | How much of that amount is for (principal / interest/principal and interest)? | Goto MORTCHMO |
| 03A1 | MORTCHMO | In what month did (you pay off your (mortgagellump sum home equity loan)/your (mortgage/lump sum home equity loan) change)? | IF (FIXEDRTJ = 2, DK or RF) or (FIXEDRTJ ne 1 AND 8500.FIXEDRTE $=2$, DK or RF) then goto PYMTJX1 |
|  |  | 1. January |  |
|  |  | 2. February | ELSE goto MCHANGE for next loan for this property |
|  |  | 3. March <br> 4. April | with 8500.LOANTYPE $=1,2$ and 8500.OPF_STAT $=1$ |
|  |  | 5. May | IF no more loans with (8500.LOANTYPE $=1,2$ |
|  |  | 6. June | and 8500.OPF_STAT = 1) for this property AND |
|  |  | 7. July | 8500.HWMNYLOC >= 1 then exit block and goto |
|  |  | 8. August | PDLOAN2 in Thomequity block |
|  |  |  |  |
|  |  | 10. October | ELSE exit block and goto ADDMORT in TAddmort |
|  |  | 11. November <br> 12. December | block |
| 03A1 | PYMTJX1 | How much was (yourlyour household's) payment on this ^mortgage_lumpsum in (reference month)? | 1-99999999, DK,RF: IF (any codes 3-6 selected in PYRINIJ) or 8500.PAYPROTX $=3$ or 8500.PAYPROIN $=4$ or 8500.PAYMORIN $=5$ or 8500.PAYOTHER $=6$ then goto PRNINJX1 <br> ELSE goto PYMTJX2 |
|  |  |  | 0: Goto PYMTJX2 |
| 03A1 | PRNINJX1 | How much of that amount is for ^prinint_fill? | 0-99999999: Goto PYMTJX2 |
| 03A1 | PYMTJX2 | How much was (yourlyour household's) payment on this ^mortgage_lumpsum in (month)? | 1-99999999,DK,RF: IF any codes 3 to 6 selected in PYRINIJ or 8500.PAYPROTX $=3$ or 8500.PAYPROIN $=$ 4 or 8500.PAYMORIN $=5$ or 8500.PAYOTHER $=6$ then goto PRNINJX2 <br> ELSE goto PYMTJX3 |
|  |  |  | 0: Goto PYMTJX3 |
| 03A1 | PRNINJX2 | How much of that amount is for (principal / interest/principal and interest)? | 0-99999999: Goto PYMTJX3 |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
| 03A1 | PYMTJX3 | How much was (yourlyour household's) payment on this (mortgage/lump sum home equity loan) in (last month)? | IF (any codes 3 to 6 selected in PYRINIJ) or 8500.PAYPROTX $=3$ or 8500.PAYPROIN $=4$ or 8500.PAYMORIN $=5$ or 8500.PAYOTHER = 6) then goto PRNINJX3 |
|  |  |  | ELSEIF there are more loans on this property with 8500.OPF_STAT = 1 then goto MCHANGE for the next loan |
|  |  |  | ELSEIF 8500.HWMNYLOC >= 1 then exit block and goto THomeequity.PDLOAN2 |
|  |  |  | ELSE exit block and goto TAddmort.ADDMORT |
| 03A1 | PRNINJX3 | How much of that amount is for (principal / interest/principal and interest)? | 0-99999999: IF there are more loans on this property with 8500.OPF_STAT = 1 then goto MCHANGE for the next loan |
|  |  |  | ELSEIF 8500.HWMNYLOC >= 1 then exit block and goto THomeequity.PDLOAN2 |
|  |  |  | ELSE exit block and goto TAddmort.ADDMORT |
|  |  |  | DK,RF: IF there are more loans on this property with 8500.OPF_STAT = 1 then goto MCHANGE for the next loan |
|  |  |  | ELSEIF 8500.HWMNYLOC >= 1 then exit block and goto THomeequity.PDLOAN2 |
|  |  |  | 1. ELSE exit block and goto TAddmort.ADDMORT |
| 03A1 | PDLOAN2 | Since the first of (reference month), (have/has) (youlyour household) made any payments for your home equity line of credit? | 1: Goto PD2AMTX1 |
|  |  | 1. Yes <br> 2. No | 2,DK,RF: Goto TOTOWED2 |
| 03A1 | PD2AMTX1 | What was the total amount paid in (reference month)? | Goto PD2AMTX2 |
| 03A1 | PD2AMTX2 | What was the total amount paid in (month)? | Goto PD2AMTX3 |
| 03A1 | PD2AMTX3 | What was the total amount paid in (last month)? | Goto TOTOWED2 |
| 03A1 | TOTOWED2 | ^TOTOWED2_FILL | Goto PDLOAN2 for next loan for this property with |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  |  | $\text { 8500.OPH_STAT = } 1$ <br> if no more loans for this property with8500.OPH_STAT = 1 then exit block and goto TAddmort.Baddmort.ADDMORT |
| 03A1 | ADDMORT | Since the first of (reference month), (havelhas) (youlyour household) obtained any (additional/ ) mortgages, including second mortgages or home equity loans, for your (property description)? <br> (Do not include reverse mortgages.I) <br> 1. Yes <br> 2. No | 1: Goto HEQUITY <br> 2,DK,RF: Exit block and goto S3A1_CHK1 |
| 03A1 | HEQUITY | Was this a mortgage or home equity loan? <br> 1. Mortgage <br> 2. Home equity loan | 1,DK,RF: Goto OTHLOAN <br> 2: Goto HELTYPE |
| 03A1 | HELTYPE | There are two basic types of home equity loans: <br> A loan where (youlyour household) received the entire lump-sum borrowed when (youlyour household) took out the loan; or <br> A line of credit loan where (youlyour household) can increase the amount borrowed by simply writing a check or using a special credit card. <br> Which type more closely describes this new home equity loan? <br> 1. Lump sum home equity loan <br> 2. Line of credit home equity loan | Goto OTHLOAN |
| 03A1 | OTHLOAN | Did you have any other new mortgages or home equity loans for (property description)? <br> 1. Yes <br> 2. No | 1: Goto HEQUITY for the next row <br> 2,DK,RF: Exit block and goto S3A1_CHK1 |
| 03A1 | PURPROP | [H 6 <br> (Other than the Sample Unit which you recently acquired/ ) ^SinceFill the first of (reference month), (have/has) (youlyour household) purchased or otherwise acquired any property or real estate? | 1: Goto PCODE <br> 2,DK,RF: Goto 3A1_END |

Section CAPI Variable Name Question Text

| $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |  |  |
| :---: | :---: | :---: | :---: |
| 03A1 | PCODE | [E] 6 <br> What kind of property(ies) is this new property or real estate? <br> - Enter all that apply, separate with commas | if 1 selected then goto NPROP2 if 2 selected then goto CK_PCODE if 3 selected then goto NPROP6 if 4 selected then goto NPROP4 |
|  |  | 1. Other homes, vacation homes, recreational properties including timeshares <br> 2. Commercial real estate or farm land <br> 3. Homes rented out or owned only for investment purposes <br> 4. Land with no buildings on it |  |
| 03A1 | NPROP2 | [E] 6 | IF 3 selected in PCODE then goto NPROP6 |
|  |  | How many other homes, vacation homes or recreational properties, including timeshares? <br> - Exclude right-to-use timeshares, vacation clubs, or destination clubs. | ELSEIF 4 selected in PCODE then goto NPROP4 ELSE goto S3A1_END |
| 03A1 | NPROP6 | [E] 6 |  |
|  |  | How many homes rented out or owned only for investment purposes? |  |
| 03A1 | NPROP4 | [14 6 | Goto S3A1_END |
|  |  | How many were land with no buildings on it? |  |
| 03A2 | OTHERHOM | [E] 6 | 1: Goto NOPROP |
|  |  | Since the first of (reference month), (have/has) (you/your household) lived in any other home that (youlyou or any members of your household) still (own/owns)? | 2,DK,RF: Goto BUSPROP3 |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 03A2 | NOPROP | [E] 6 | Goto BUSPROP3 |
|  |  | How many? |  |
| 03A2 | BUSPROP3 | [J 6 <br> (Do/Does) (youlyour household) own any commercial real estate or farm land? | Goto RESBUSPR |

Section CAPI Variable Name Question Text

|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| :---: | :---: | :---: | :---: |
| 03A2 | RESBUSPR | [E] 6 | 1: Goto RES_NUM |
|  |  | (In the following questions, please do not include any of the commercial properties (youlyour household) ^own_owns only for business or investment purposes.) | 2,DK,RF: Goto SECHOME |
|  |  | (DolDoes) (youlyour household) own any homes rented out or owned only for investment purposes? |  |
|  |  | 1. Yes |  |
|  |  | 2. No |  |
| 03A2 | RES_NUM | [4] 6 | Goto SECHOME |
|  |  | How many? |  |
| 03A2 | SECHOME | [14 6 | 1: Goto SEC_NUM |
|  |  | (In the following questions, please do not include any of the properties ${ }^{\wedge}$ You_YRCU (own/owns) only for business or investment purposes) <br> (Other than the property you have already mentioned.l ) <br> (DolDoes/do/does) (youlyour household) own any other homes, vacation homes, or recreational properties, including timeshares? | 2,DK,RF: Goto NOBUILD |
|  |  | - Exclude right-to-use timeshares, vacation clubs, or destination clubs. |  |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 03A2 | SEC_NUM | [1] 6 | Goto NOBUILD |
|  |  | How many? |  |
|  |  | - Exclude right-to-use timeshares, vacation clubs, or destination clubs. |  |
| 03A2 | NOBUILD | [E] 6 | 1: Goto BUILDNUM |
|  |  | Other than property you have already mentioned, (do/does) (youlyour household) own any land without buildings on it? | 2,DK,RF: Goto NOLONGER |




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|  |  | (* Press Enter to continue.l* Enter 888 to delete this property.) | 888: Goto next property |
| 03B | TIMESHAR | ? [F1] | 1: Goto DEEDED |
|  |  | Is this a time-sharing arrangement where (youlyour household) (have/has) use of the property only for a specified length of time each year? | 2,DK,RF: Goto SHARED2 |
|  |  | 1. Yes 2. No |  |
| 03B | DEEDED | Is this a deeded or right-to-use timeshare? | 1,DK,RF: Goto SHARWKS |
|  |  | 1. Deeded <br> 2. Right-to-use | 2: Goto CH DEEDED |
| 03B | SHARWKS | How many weeks are (youlyour household) entitled to use your timeshare each year? | 1-16, DK, RF: Goto SHARED1 17-52: Goto ERR1_SHARWKS |
| 03B | SHARED1 | (DolDoes) (youlyour household) own the timeshare with anyone else outside your household? | 1: Goto SHARPER1 |
|  |  | 1. Yes <br> 2. No | 2,DK,RF: Goto COUNTRY |
| 03B | SHARPER1 | What percent of the timeshare (do/does) (youlyour household) own? | Goto COUNTRY |
| 03B | SHARED2 | (DolDoes) (youlyour household) share ownership of the property with anyone else? | 1: Goto SHARPER2 |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ | 2,DK,RF: IF OWNYB = 300 then goto COUNTRY <br> ELSEIF INTNMBR = 2-5 and NEWCU ne 1 AND <br> OWNYB ne 100 then goto STILOWNB <br> ELSEIF BCeintro.BUSCREEN = 2 AND OWNYB <br> = 100 then goto BSNEXP2 <br> ELSEIF BCeintro.BUSCREEN = 2 then goto ACQUIRYR <br> ELSE goto BSNSEXP |
| 03B | SHARPER2 | What percentage of the property (do/does) (youlyour household) own? | IF OWNYB $=300$ then goto COUNTRY |
|  |  |  | ELSEIF INTNMBR $=2-5$ AND NEWCU ne 1 AND OWNYB ne 100 then goto STILOWNB |
|  |  |  | ELSEIF BCeintro.BUSCREEN $=2$ AND OWNYB $=100$ then goto BSNEXP2 |
|  |  |  | ELSEIF BCeintro.BUSCREEN $=2$ then goto |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  |  | ACQUIRYR |
|  |  |  | ELSE goto BSNSEXP |
| 03B | COUNTRY | - Ask if not apparent <br> - If this is a timeshare with multiple locations, select the most often used location. | 1: Goto STATE |
|  |  | Where is the property located? | 2,DK,RF: IF INTNMBR = 2-5 AND NEWCU ne 1 and OWNYB ne 100 then goto STILOWNB <br> ELSEIF BCeintro.BUSCREEN $=2$ AND OWNYB ne 600 then goto ACQUIRYR |
|  |  | 1. United States <br> 2. Foreign Country | ELSEIF OWNYB ne 600 then goto BSNSEXP <br> ELSE goto S3B_END |
| 03B | STATE | $?[\mathrm{~F} 1]$ <br> Enter the two character State abbreviation | IF DK or RF: IF INTNMBR = 2-5 AND NEWCU ne 1 AND OWNYB ne 100 then goto STILOWNB ELSEIF BCeintro.BUSCREEN = 2 AND OWNYB ne 600 then goto ACQUIRYR ELSEIF OWNYB ne 600 then goto BSNSEXP ELSE goto S3B_END |
|  |  |  | ELSE: Goto CNTYCODE |
| 03B | CNTYCODE | What county is the property located in? <br> - If the county name is not found, key X . | 30 characters,DK,RF: IF INTNMBR = 2-5 AND NEWCU ne 1 AND OWNYB ne 100 then goto STILOWNB <br> ELSEIF BCeintro.BUSCREEN = 2 AND <br> OWNYB ne 600 then goto ACQUIRYR <br> ELSEIF OWNYB ne 600 then goto <br> BSNSEXP <br> ELSE goto S3B_END |
|  |  |  | X: Goto OTHCNTY |
| 03B | OTHCNTY | - Specify other county | IF INTNMBR = 2-5 AND NEWCU ne 1 AND OWNYB ne 100 then goto STILOWNB |
|  |  |  | ELSEIF BCeintro.BUSCREEN = 2 AND OWNYB ne 600 then goto ACQUIRYR |
|  |  |  | ELSEIF OWNYB ne 600 then goto BSNSEXP |
|  |  |  | ELSE goto S3B_END |
| 03B | STILOWNB | - Ask if not apparent <br> Do you still own this property? | IF OWNYB = 600 then goto S3B_END ELSEIF BCeintro.BUSCREEN = 2 AND OWNYB ne 600 then goto ACQUIRYR ELSE goto BSNSEXP |

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| :---: | :---: | :---: | :---: |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 03B | BSNSEXP | (Are/Were) any of the expenses for this property deducted as a farm, rental, or business expense? | 1: Goto OBSNSZB |
|  |  |  | 2,DK,RF: IF OWNYB = 100 then goto BSNEXP2 ELSE goto ACQUIRYR |
|  |  | 1. Yes <br> 2. No |  |
| 03B | OBSNSZB | 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. | 1-99,DK,RF: Goto ACQUIRYR |
|  |  |  | 100: Goto ERR2_OBSNSZB |
| 03B | BSNEXP2 | Is any part of this property you own rented to someone outside your household or used for business? | Goto ACQUIRYR |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 03B | ACQUIRYR | In what year did (youlyour household) close or settle on this property? | $\begin{aligned} & \text { 1900-9999: If entry = current or previous year, goto } \\ & \text { ACQUIRMO } \\ & \text { Else goto ANPROPTX } \end{aligned}$ |
|  |  |  | DK, RF: goto ANPROPTX |
| 03B | ACQUIRMO | In what month did (youlyour household) close or settle on this property? | 1-12: IF ACQUIRMO/ACQUIRYR are within the reference period then goto GIFTPROP |
|  |  | 1. January | ELSE goto ANPROPTX |
|  |  | 2. February |  |
|  |  | 3. March <br> 4. April | DK,RF: Goto ANPROPTX |
|  |  | 5. May |  |
|  |  | 6. June |  |
|  |  | 7. July |  |
|  |  | 8. August |  |
|  |  | 9. September |  |
|  |  | 10. October |  |
|  |  | 11. November <br> 12. December |  |
| 03B | GIFTPROP | Was this property received as a gift or inheritance? | 1,DK,RF: Goto ANPROPTX |
|  |  |  | 2: Goto OWN_PURX |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 03B | OWN_PURX | [1] 6 ? [F1] | Goto CLOSECST |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | What was the total price paid for (this/the) property, not including closing costs? |  |
| 03B | CLOSECST | [4] 6 ? [F1] | Goto OWNDPMTX |
|  |  | About how much were the closing costs? |  |
| 03B | OWNDPMTX | What was the amount of the down payment? | Goto ANPROPTX |
| 03B | ANPROPTX | What (are/were) the annual property taxes for (this/the) property? | IF OWNYB $=400$ then goto S3B_END |
|  |  |  | ELSEIF OWNYB ne 400 AND NOT (OWNYB = 100 AND SECT01.BUILDING (from Section 1C) $=1,9,10$ ) then goto PROPTYPE |
|  |  |  | ELSE goto S3B_END |
| 03B | PROPTYPE | - Ask if not apparent. <br> - If respondent doesn't know or refuses select pre-code 3. | Goto S3B_END |
|  |  | (Was/ls) this property a - |  |
|  |  | 1. Condominium <br> 2. Cooperative <br> 3. Something else |  |
| 03D | DISPMTHD | You said (you/your household) no longer (own/owns) your (property description). Did (youlyour household) sell it, give it to someone outside your household, or do something else with it? | 1,2,DK,RF: Goto DISPYR <br> 3: Goto DISPOTH |
|  |  | 1. Sold the property or traded the property in <br> 2. Gave it to someone outside household <br> 3. Something else, other - specify |  |
| 03D | DISPOTH | - Specify: | Goto DISPYR |
| 03D | DISPYR | In what year did (youlyour household) (sell( trade) this propertylgive this property to someone outside your CU/dispose of this property)? | Goto DISPMO |
| 03D | DISPMO | In what month did (you/your household) (sell( trade) this property/give this property to someone outside your CU/dispose of this property)? | IF DISPMO = DK or RF then goto S3D_END |
|  |  | 1. January | ELSEIF DISPYR = DK or RF then goto S3D_END |
|  |  | 2. February <br> 3. March <br> 4. April | ELSEIF DISPMTHD $=1$ AND (DISPMO and DISPYR are within the reference period then goto DISPX |



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|  |  |  | ELSE goto ERR3_DISPMO - Display DISPDATE_ERR |
| 03D | DISPX | What was the selling price (trade-in value)? | Goto DISPEXPX |
| 03D | DISPEXPX | [动 7 ? [F1] | Goto S3D_END |
|  |  | 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 (yourlyour household's) expenses were. What were (yourlyour household's) total expenses in selling (trading) this property? |  |
| 03E | PRESMORT | Now I am going to ask about mortgages for your (property description). Excluding home equity loans, (and reverse mortgagesl ), (do/does) (youlyour household) presently have a mortgage on your (property description)? | 1: Goto NUMMORT1 <br> 2,DK,RF: Goto HADMORT |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 03E | NUMMORT1 | How many mortgages ^havehas (youlyour household) had on this property since the first of (reference month)? | Goto HOMEQ_YN |
| 03E | HADMORT | (Have/Has) (youlyour household) had a mortgage on this property since the first of (reference month)? | 1: Goto NUMMORT2 |
|  |  | 1. Yes <br> 2. No | 2,DK,RF: Goto HOMEQ_YN |
| 03E | NUMMORT2 | How many mortgages (have/has) (youlyour household) had on this property since the first of (reference month)? | Goto HOMEQ_YN |
| 03E | MRTCPSHA | Since the first of (reference month), in addition to (yourlyour household's) share of the cooperative's total costs, did (youlyour household) make payments on a mortgage that was obtained from an outside lender for (yourlyour household's) shares in the cooperative? | 1: Goto NUMMORT3 <br> 2,DK,RF: Goto HOMEQ_YN |
|  |  | 1. Yes <br> 2. No |  |
| 03E | NUMMORT3 | How many mortgages (have/has) (youlyour household) had on this property since the first of (reference month)? | Goto HOMEQ_YN |
| 03E | HOMEQ_YN | (DolDoes) (youlyour household) have a home equity loan or any other loan which gives the lender claim on this property in case the loan is not repaid? | $\begin{aligned} & \text { 1: Goto LSHEL_YN } \\ & \text { 2,DK,RF: Goto S3E_END } \end{aligned}$ |

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|  |  | 1. Yes |  |
|  |  | 2. No |  |
| 03E | LSHEL_YN | ^LSHEL_YN_FILL_ONCE | 1: Goto NUMLSHEL |
|  |  | (Have/Has) (youlyour household) had a lump sum home equity loan on this property since the first of (reference month)? | 2,DK,RF: Goto LCHEL_YN |
|  |  | 1. Yes <br> 2. No |  |
| 03E | NUMLSHEL | How many? | Goto LCHEL_YN |
| 03E | LCHEL_YN | ^C_HaveHas (youlyour household) had a line of credit home equity loan on this property since the first of (reference month)? | 1: Goto NUMLCHEL 2,DK,RF: Goto S3E_END |
|  |  | 1. Yes <br> 2. No |  |
| 03E | NUMLCHEL | How many? | Goto S3E_END |
| 03F | ORG_INTR | Now I will ask some questions about your (1st/2nd/3rd/etc.) (mortgage/lump sum home equity loan). <br> These questions refer to the (mortgagellump sum home equity loan) you are currently making payments on. | 1: Goto ORGMRTX <br> 2: Goto S3FG_END |
|  |  | 1. Continue <br> 2. Delete the loan |  |
| 03F | ORGMRTX | What was the amount of the (mortgage/lump sum home equity loan) when (youlyour household) first obtained it, not including any interest? | Goto FRSTPYYR |
| 03F | FRSTPYYR | In what year did (youlyour household) make the first payment on this (mortgagellump sum home equity loan)? | Goto FRSTPYMO |
| 03F | FRSTPYMO | In what month did (youlyour household) make the first payment on this (mortgage/lump sum home equity loan)? | Goto MTERM |
|  |  | 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 |  |

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| :---: | :---: | :---: | :---: |
|  |  | 10. October |  |
|  |  | 11. November |  |
|  |  | 12. December |  |
| 03F | MTERM | Is this a 30 year (mortgage/lump sum home equity loan), a 15 year (mortgage/lump sum home equity loan), or something else? | 1: goto NEWMRRT |
|  |  |  | 2: goto NEWMRRT |
|  |  | 1. 30-year |  |
|  |  | 2. 15-year | 3: Goto MORTTERM |
|  |  | 3. Something else |  |
|  |  |  | DK,RF: Goto NEWMRRT |
| 03F | MORTTERM | - Enter number of years | Goto NEWMRRT |
| 03F | NEWMRRT | What is the current interest rate on this (mortgagellump sum home equity loan)? <br> Enter percent including decimal | Goto FIXEDRTE |
|  |  |  |  |
| 03F | FIXEDRTE | Is this a fixed rate (mortgagellump sum home equity loan)? | 1: Goto PAYINCL |
|  |  | 1. Yes2. No | 2,DK,RF: Goto PAYTYPE |
|  |  |  |  |
| 03F | PAYTYPE | ? [F1] | IF 3 is selected then goto PAYTOTHF |
|  |  | There are many different kinds of (mortgages/lump sum home equity loans). Which of these comes closest to (yoursl your household's)? | ELSE goto PAYINCL |
|  |  | - Read each item on list <br> - Mark all that apply, separate with commas |  |
|  |  | 1. Variable or adjustable rate of interest (ARM) |  |
|  |  | 2. Interest only <br> 3. Other - Specify |  |
| 03F | PAYTOTHF | - Specify: | Goto PAYINCL |
| 03F | PAYINCL | [E] 7 [F1] | IF 6 selected then goto PAYOTHF |
|  |  | On (yourlyour household's) last payment, which of these things were included? | ELSEIF FIXEDRTE $=1$ then goto MRTPMTX |
|  |  | - Read each item on list | ELSE goto PAYMTX1 |
|  |  | - Enter all that apply, separate with commas |  |
|  |  | 1. Principal <br> 2. Interest |  |

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| :---: | :---: | :---: | :---: |
|  |  | 3. Property taxes |  |
|  |  | 4. Property insurance |  |
|  |  | 5. Mortgage guarantee insurance (PMI) |  |
|  |  | 6. Any other payments - specify |  |
|  |  | 77. Don't know |  |
| 03F | PAYOTHF | - Specify: | IF FIXEDRTE $=1$ then goto MRTPMX |
|  |  |  | ELSE goto PAYMTX1 |
| 03F | MRTPMTX | How much is (yourlyour household's) (mortgage/lump sum home equity loan) payment per month? | 1-99999999: IF any codes 3-6 are selected in PAYINCL then goto PRININTX <br> ELSE goto S3FG_END |
|  |  |  | DK,RF: IF any codes 3-6 are selected in PAYINCL then goto PRININTX <br> ELSE goto S3FG_END |
| 03F | PRININTX | How much of that amount was for ^prinint_fill? | Goto S3FG_END |
| 03F | PAYMTX1 | How much was (yourlyour household's) payment on this (mortgage/lump sum home equity loan) in (reference month)? | 0: Goto PAYMTX2 |
|  |  |  | 1-99999999,DK,RF: IF any codes 3-6 selected in PAYINCL then goto PRNINTX1 <br> ELSE goto PAYMTX2 |
| 03F | PRNINTX1 | How much of that amount was for ^prinint_fill? | Goto PAYMTX2 |
| 03F | PAYMTX2 | How much was (yourlyour household's) payment on this (mortgage/lump sum home equity loan) in (month)? | 0: Goto PAYMTX3 |
|  |  |  | 1-99999999,DK,RF: IF any codes 3-6 selected in PAYINCL then goto PRNINTX2 <br> ELSE goto PAYMTX3 |
| 03F | PRNINTX2 | How much of that amount was for ^prinint_fill? | Goto PAYMTX3 |
| 03F | PAYMTX3 | How much was (yourlyour household's) payment on this (mortgage/lump sum home equity loan) in (last month)? | 0,DK,RF: Goto S3FG_END |
|  |  |  | 1-99999999: IF any codes 3-6 selected in PAYINCL then goto PRNINTX3 <br> ELSE goto S3FG_END |
| 03F | PRNINTX3 | How much of that amount is for ^prinint_fill? | Goto S3FG_END |
| 03H | PAIDLOAN | (I'd like to ask some questions about (yourlyour CUs) line of credit home equity (loan/laons).) | 1: Goto PDAMTX1 |
|  |  |  | 2,DK,RF: Goto TOTOWED |
|  |  | Since the first of (reference month), (have/has) (youlyour household) made any payments for (yourlyour household's) (this loan/1st/2nd/3rd/etc.)? | 888: Goto next loan |

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| :---: | :---: | :---: | :---: |
|  |  | 1. Yes |  |
|  |  | 2. No |  |
|  |  | 888. Delete this loan |  |
| 03H | PDAMTX1 | What was the total amount paid in (reference month)? | Goto PDAMTX2 |
| 03H | PDAMTX2 | What was the total amount paid in (month)? | Goto PDAMTX3 |
| 03H | PDAMTX3 | What was the total amount paid in (last month)? | Goto TOTOWED |
| 03H | TOTOWED | ^TOTOWED_FILL | Goto S3H_END |
| 031 | MORTSPEC | Now I'm going to ask about other ownership costs for your (property description). | 1: Goto SPECIALX |
|  |  | Since the first of (reference month), have (youlyou or any members of your household) paid more than the amount required on any mortgage or lump sum home equity loan for this property? | 2,DK,RF: Goto GRNDRENT |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 031 | SPECIALX | How much EXTRA did (youlyour household) pay? | 1-99999999: Goto SPECLXCM |
|  |  |  | DK,RF: Goto GRNDRENT |
| 031 | SPECLXCM | How much of that amount was paid this month? | Goto GRNDRENT |
| 031 | GRNDRENT | (Now I'm going to ask about ownership costs for your (property description)/ ) | 1: Goto GRNDRNTX |
|  |  | Since the first of (reference month), (have/has) (youlyour household) made any payments for ground or land rent for (property description)? | 2,DK,RF: If PROPTYPE $=1$ then goto PAYCONDO <br> If PROPTYPE $=2$ then goto COOPRG3 <br> If PROPTYPE $=3$ then goto PAYHOASS |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 031 | GRNDRNTX | What was the total amount paid? | 1-99999999: Goto GRNDRTCX |
|  |  |  | DK,RF: IF PROPTYPE = 1 then goto PAYCONDO <br> If PROPTYPE $=2$ then goto COOPRG3 <br> If PROPTYPE $=3$ then goto PAYHOASS |
| 031 | GRNDRTCX | How much of that amount was paid this month? | IF PROPTYPE $=1$ then goto PAYCONDO <br> IF PROPTYPE $=2$ then goto COOPRG3 <br> IF PROPTYPE $=3$ then goto PAYHOASS |
| 031 | PAYHOASS | (Do/Does) (youlyour household) make regular payments to a homeowner's association? | 1: Goto HORCORG 2,DK,RF: Goto SPCLPAY2 |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 031 | PAYCONDO | (Are/ls) (youlyour household) required to make regular payments of condominium fees for general maintenance or management services? | 1: Goto HORCORG |
|  |  |  | 2,DK,RF: Goto SPCLPAY2 |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 031 | COOPRG3 | [4] 7 ? [F1] | 12,RF: Goto SPCLPAY1 |
|  |  | Now I'd like to ask you about payments (youlyour household) (make/makes) directly to the cooperative for (yourlyour household's) share of its costs. <br> Since the first of (reference month), have (youlyou or any members of your household) made any payments for any of the following things - | 1-11,77: IF 11 selected then goto CORGOTH ELSE goto MGOTHERX |

- Read each item on the list
- Enter 12 for no payments made

1. Repayment of loans owed by cooperative
2. Property taxes
3. Property Insurance
4. Management
5. Repairs or maintenance, including lawn care or snow removal
6. Improvements
7. Recreational including swimming, golf or tennis facilities
8. Security including guards or alarm systems
9. Utilities such as gas, electricity, water, hea
10. Trash collection
11. Other
12. No payments made
13. Don't know

| 0031 | CORGOTH | Specify: |
| :--- | :--- | :--- |
| 031 | HORCORG 8 ?F1] |  |
|  |  | Which of the following services and privileges were included in |

those payments?

- Read each item on the list.


## Goto MGOTHERX

1-11,77: IF 11 selected then goto HORGOTH
ELSEIF there is at least one loan of LOANTYPE
$=1$ on this property then goto MGOTHER
ELSE goto MGOTHERX
RF: Goto SPCLPAY2

| Section | CAPI Variable Name | Question Text |
| :--- | :---: | :---: |
|  | Enter all that apply---separate with commas. |  |

1. Management
2. Repairs or maintenance, including lawn care or snow remova
3. Improvements
4. Utilities such as gas, electricity, water, heat
5. Parking
6. Recreational including swimming, golf, or tennis facilities
7. Security including guards or alarm systems
8. Maid Services
9. Medical Services
10. Trash collection
11. Other


| 031 | MGOTHER | Since the first of (reference month), have you made ANY regular payments for these services? | 1,DK,RF: Goto MGOTHERX <br> 2: IF PROPTYPE $=2$ then goto SPCLPAY1 ELSE goto SPCLPAY2 |
| :---: | :---: | :---: | :---: |
|  |  |  |  |
|  |  | 1. Yes |  |
|  |  | 2. No |  |
| 031 | MGOTHERX | Since the first of (reference month), how much (have/has) (youlyour household) paid for these services? | 1-99999999: Goto MGOTHRCX |
|  |  |  | 0,DK,RF: IF PROPTYPE $=2$ then goto SPCLPAY1 ELSE goto SPCLPAY2 |
| 031 | MGOTHRCX | How much of that amount was paid this month? | IF PROPTYPE $=2$ then goto SPCLPAY1 ELSE goto SPCLPAY2 |
| 031 | SPCLPAY1 | [4] ? [F1] | 1: Goto COOPSP3 |
|  |  | (Have/Has) (youlyour household) made any SPECIAL payments to a management service? | 2,DK,RF: Goto ASSESSMT |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 031 | SPCLPAY2 | [4] 8 ? [F1] | 1: Goto HOCOSP3 |

(Have/Has) (youlyour household) made any SPECIAL payments to a management service? 2,DK,RF: Goto ASSESSMT
Section CAPI Variable Name Question Text $\quad$ Skip Instructions

|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| :---: | :---: | :---: | :---: |
| 031 | COOPSP3 | [EH 7 ? [F1] | IF 11 is selected then goto COSPOTH |
|  |  | Since the first of (reference month), what services were provided? | ELSE goto SPECLX |
|  |  | - Enter all that apply, separate with commas |  |
|  |  | 1. Repayment 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 |  |
| 031 | COSPOTH | - Specify: | Goto SPECLX |
| 031 | HOCOSP3 | [17 8 ? [F1] | IF 11 is selected then goto HOSPOTH |
|  |  | Since the first of (reference month), what services were provided? | ELSE goto SPECLX |
|  |  | - Enter all that apply, separate with commas |  |
|  |  | 1. Management |  |
|  |  | 2. Repairs or maintenance, including lawn care or snow removal |  |
|  |  | 3. Improvements |  |
|  |  | 4. Utilities such as gas, electricity, water, heat |  |
|  |  | 5. Parking |  |
|  |  | 6. Recreational including swimming, golf, or tennis facilities |  |
|  |  | 7. Security including guards or alarm systems |  |
|  |  | 8. Maid Services |  |
|  |  | 9. Medical Services |  |
|  |  | 10. Trash collection |  |
|  |  | 11. Other |  |
|  |  | 77. Don't Know |  |

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| 031 | HOSPOTH | - Specify: | Goto SPECLX |
| 031 | SPECLX | Since the first of (reference month), how much were these special payments? | 1-99999999: goto SPECLCX |
|  |  |  | DK,RF: Goto ASSESSMT |
| 031 | SPECLCX | How much of that amount was paid this month? | Goto ASSESSMT |
| 031 | ASSESSMT | Since the first of (reference month) (have/has) (youlyour household) 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 <br> 2,DK,RF: IF OWNYB = 100 then goto RNTEQVX ELSEIFIF OWNYB = 300 then goto VAC_OCCQ ELSE goto S3I_END |
| 031 | ASSESSX | What was the total amount paid? | 1-99999999: goto ASSESSCX |
|  |  |  | DK,RF: IF OWNYB = 100 then goto RNTEQVX ELSEIF OWNYB = 300 then goto VAC_OCCQ ELSE goto S3I_END |
| 031 | ASSESSCX | How much of that amount was paid this month? | 0-99999999: IF OWNYB = 100 then goto RNTEQVX ELSEIF OWNYB $=300$ then goto VAC_OCCQ ELSE goto S3I_END |
|  |  |  | DK,RF: IF OWNYB = 100 then goto RNTEQVX ELSEIF OWNYB $=300$ then goto VAC_OCCQ ELSE goto S3I_END |
| 031 | VAC_OCCQ | Since the first of (reference month), how much time did you occupy this (timeshare/property)? <br> Enter quantity and select period on next screen. | $0, \mathrm{DK}, \mathrm{RF}:$ IF TIMESHAR (from 3B) $=2$, DK or RF then goto VAC_SEC <br> ELSEIF TIMESHAR (from 3B) = 1 then goto <br> TIME_RNT <br> ELSE goto S3I_END |
|  |  |  | 1-150: Goto VAC_OCCY |
| 031 | VAC_OCCY | - Enter time period. | 1-4,DK,RF: IF TIMESHAR (from $3 B$ ) $=2$, DK or RF then goto VAC_SEC <br> ELSEIF TIMESHAR (from 3B) $=1$ then goto |
|  |  | 1. Days | TIME_RNT |
|  |  | 2. Weeks | ELSE goto S3I_END |
|  |  | 3. Months | 5. Goto VAC OTH |
|  |  | 4. Percent <br> 5. Other, specify | 5: Goto VAC_OTH |
| 031 | VAC_OTH | - Specify: | IF TIMESHAR (from 3B) $=2$, DK or RF then goto VAC_SEC |


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| :---: | :---: | :---: | :---: |
|  |  |  | ELSEIF TIMESHAR (from 3B) = 1 then goto TIME_RNT ELSE goto S3I_END |
| 031 | VAC_SEC | Since the first of (reference month), was this property either rented by someone outside your household or available to be rented? | 1: Goto VAC_RNTQ |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 031 | VAC_RNTQ | Since the first of (reference month), how much time was this property rented by someone outside your household? <br> Enter quantity and select period on next screen. | 0,DK,RF: Goto VAC_AVAQ |
|  |  |  | 1-150: Goto VAC_RNTY |
| 031 | VAC_RNTY | - Enter time period. | 1-4,DK,RF: Goto VAC_AVAQ |
|  |  |  | 5: Goto VAC_ROTH |
|  |  | 1. Days |  |
|  |  | 2. Weeks |  |
|  |  | 3. Months |  |
|  |  | 4. Percent |  |
|  |  | 5. Other, specify |  |
| 031 | VAC_ROTH | - Specify: | Goto VAC_AVAQ |
| 031 | VAC_AVAQ | Since the first of (reference month), how much time was this property available to be rented, but not rented out? | 0,DK,RF: IF OWNYB = 300 then goto RNTEQV2X ELSE goto S3I_END |
|  |  | - Enter quantity and select period on next screen. | 1-150: Goto VAC_AVAY |
| 031 | VAC_AVAY | - Specify | 1-4: IF OWNYB = 300 then goto RNTEQV2X ELSE goto S3I_END |
|  |  | 1. Days | DK RF: IF OWNYB - 300 then goto RNTEQV2X |
|  |  | 2. Weeks <br> 3. Months | DK,RF: IF OWNYB = 300 then goto RNTEQV2X ELSE goto S3I_END |
|  |  | 4. Percent |  |
|  |  | 5. Other, specify | 5: Goto VAC_AOTH |
| 031 | VACAOTH | - Specify | IF OWNYB = 300 then goto RNTEQV2X |
|  |  |  | ELSE goto S3I_END |
| 031 | RNTEQV2X | If someone were to rent this home today, how much do you think it would rent for? | Goto RENTPERD |
| 031 | RENTPERD | - Ask if not already stated. | 1-3,DK,RF: Goto RENTUTIL |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | What period of time does this rental amount cover? | 4: Goto RNPEROTH |
|  |  | 1. Week |  |
|  |  | 2. Month |  |
|  |  | 3. Quarter |  |
|  |  | 4. Other specify |  |
| 031 | RNPEROTH | - Specify: | Goto RENTUTIL |
| 031 | RENTUTIL | Does this amount include utilities? | Goto PROPVALX |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 031 | RNTEQVX | If someone were to rent this (including part of the property currently being used for business, farming, or rented/home today) how much do you think it would rent for monthly, unfurnished and without utilities? | 1-999999: IF OWNYB = 100 OR (OWNYB = 300 AND TIMESHAR (from 3B) $=2$, D or R then goto PROPVALX ELSE goto S3I_END |
|  |  |  | DK,RF: $\quad$ IF OWNYB $=100$ OR (OWNYB $=300$ AND TIMESHAR (from 3B) $=2$, DK or RF then goto PROPVALX <br> ELSE goto S3I_END |
| 031 | PROPVALX | About how much do you think this property would sell for on today's market? | Goto S3I_END |
| 031 | TIME_RNT | Since the first of (reference month), did you rent this timeshare to someone outside your household? | Goto RNTEQV3X |
|  |  | 1. Yes <br> 2. No |  |
| 031 | RNTEQV3X | If you were to rent this timeshare today to someone else, instead of using it yourself, how much would it rent for weekly? | Goto PRPVAL2X |
| 031 | 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: Goto S3I_END |
| 03 | ANYRENT | Since the first of (reference month) have (youlyou or any members of your household) rented any houses, apartments, or temporary living quarters NOT used entirely for business or vacation? | 1: Goto RENTX1 <br> 2,DK,RF: Goto Section 4 |

- Do NOT include college or university regulated housing.

1. Yes

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| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 2. No |  |
| 02B | RENTX1 | What was your total rental payment for (reference 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. | Goto RENTX2 |
| 02B | RENTX2 | What was the total rental payment for (month) for this unit? | Goto RENTX3 |
| 02B | RENTX3 | What was your total rental payment for (last month) for this unit? | Goto RTELECT |
| 02B | RTELECT | [日] 6 | Goto RTGAS |
|  |  | Does the rental payment include the cost of ... Electricity? |  |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 02B | RTGAS | [46 6 | Goto RTWATER |
|  |  | - Repeat if necessary <br> Does the rental payment include the cost of - <br> . . . Gas? |  |
|  |  | 1. Yes 2. No |  |
| 02B | RTWATER | [E] 6 <br> - Repeat if necessary | Goto RTHEAT |

Does the rental payment include the cost of
. . . Piped in water?

1. Yes

|  | 1. Y |  |
| :--- | :--- | :--- |
|  |  | 2. |

[^2]| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | Does the rental payment include the cost of - |  |
|  |  | .... Heating? |  |
|  |  | 1. Yes <br> 2. No |  |
| 02B | RTTRASH | [16 6 | Goto RTPARK |
|  |  | Repeat if necessary |  |
|  |  | Does the rental payment include the cost of ... Trash/garbage collection? |  |
|  |  | 1. Yes <br> 2. No |  |
| 02B | RTPARK | [14 6 <br> Repeat if necessary | Goto RTASPAY |

Does the rental payment include the cost of -
. . . Garage and parking facilities?


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | * Repeat if necessary |  |
|  |  | Does the rental payment include the cost of - |  |
|  |  | . . . Television services? |  |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 02B | RTINTRNT | [1] 6 | Goto RTFUNSH |
|  |  | - Repeat if necessary <br> Does the rental payment include the cost of - |  |
|  |  | . . . Internet services? |  |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 02B | RTFUNSH | [日] 6 | Goto RTASPAY |
|  |  | - Repeat if necessary <br> Does the rental payment include the cost of - <br> . . Furniture? <br> 1. Yes <br> 2. No |  |
|  |  |  |  |
|  |  |  |  |
| 02B | RTASPAY | Did (youlyou or any members of your household) receive any reduced or free rent for this unit as a form of pay since the first of (reference month)? | 1: Goto RTCOMPX |
|  |  | 1. Yes <br> 2. No | 2,DK,RF: IF BCeintro.BUSCREEN $=2$ AND (PSU=06001, 06013, 06037, 06041, 06059, 06065, 06071, 06081, 06073, 06075, 06087, 06097, 11001, 24021, 24043, 34003, 34013, 34017, 34023, 34027, 34031, 34037, 36005, 36047, 36059, 36061, 36081, 36085, 36087, 36103, 36119) go to RENTCONT |
|  |  |  | ELSEIF BCeintro.BUSCREEN = 2 goto MORERENT |
|  |  |  | ELSE goto RTBSNS |
| 02B | RTCOMPX | What is the current monthly rental charge to another tenant for a similar unit? | Goto REGRNTX |
| 02B | REGRNTX | What is your regular rental payment? | IF BCeintro.BUSCREEN = 2 AND (PSU=06001, 060 |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  |  | 06037, 06041, 06059, 06065, 06071, 06081, 06073, 06075, 06087, 06097, 11001, 24021, 24043, 34003, 34013, 34017, 34023, 34027, 34031, 34037, 36005, 36047, 36059, 36061, 36081, 36085, 36087, 36103, 36119) go to RENTCONT <br> ELSEIF BCeintro.BUSCREEN $=2$ goto MORERENT <br> ELSE goto RTBSNS |
| 02B | RTBSNS | Is any portion of this unit used for your own business? <br> 1. Yes <br> 2. No | 1: Goto RTBSNSZ <br> 2,DK,RF: IF PSU = 06001, 06013, 06037, 06041, 06059, 06065, 06071, 06073, 06075, 06081 06087, 06097, 11001, 24021, 24043, 34003, 34013, 34017, 34023, 34027, 34031, 34037, 36005, 36047, 36059, 36061, 36081, 36085, 36087, 36103, 36119, then goto RENTCONT <br> ELSE goto MORERNT |
| 02B | RTBSNSZ | What percent of the rental payment is counted as a business expense? <br> Enter to the nearest whole percent. | 1-99,DK,RF: IF PSU = 06001, 06013, 06037, 06041, 06059, 06065, 06071, 06073, 06075, 06081, 06087, 06097, 11001, 24021, 24043, 34003, 34013, 34017, 34023, 34027, 34031, 34037, 36005, 36047, 36059, 36061, 36081, 36085, 36087, 36103, 36119 then goto RENTCONT <br> ELSE goto MORERNT <br> 100: Goto ERR2_RTBSNSZ |
| 02B | RENTCONT | Is this unit under rent control? <br> 1. Yes <br> 2. No | Goto MORERNT |
| 02B | MORERNT | Since the first of (reference month), have (youlyou or any members of your household) 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. <br> 1. Yes <br> 2. No | $\begin{aligned} & \text { 1: } \quad \text { Goto RENTX1 } \\ & \text { 2,DK,RF: Goto S2_END } \end{aligned}$ |

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| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
| 04A | S4A_INTRO | [d 9 | Goto TELEBILL |
|  |  | Now I am going to ask about utilities including telephone 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 bill you have received, even if the bill has not been paid. First, I'll ask you about telephone bills. |  |
|  |  | Description Amount1 Amount2 Amount3 |  |
|  |  | (TELCOMP) (TELCHGX1) (TELCHGX2) (TELCHGX3) |  |
| 1. Enter 1 to Continue |  |  |  |
| 04A | TELEBILL | [d9 9 ? F 1$]$ | 1: IF any 8500.TELCOMP = 1-20 then goto PREVCOMP |
|  |  | Since the first of (reference month), have (youlyou or any members of your household) received any bills for telephone services, including cellular and Voice Over IP? Do not include bills for telephones used entirely for business purposes. | ELSE goto TELCOMP <br> 2,DK,RF: Goto S4A_END |
|  |  | 1. Yes <br> 2. No |  |
| 04A | PREVCOMP | What is the name of the company which provides the service? | 1-20: IF BCeintro.BUSCREEN = 2 goto TELCHGX1 ELSE goto TELBSNS |
|  |  | Description Amount1 Amount2 Amount3 | 55: Goto TELCOMP |
|  |  | (TELCOMP) (TELCHGX1) (TELCHGX2) (TELCHGX3) | 888: Goto TELOTH |
|  |  | 1. ^Temprevcomp[1] |  |
|  |  | 2. ^Temprevcomp[2] |  |
|  |  | 3. ^Temprevcomp[3] |  |
|  |  | 4. ${ }^{\wedge}$ Temprevcomp[4] |  |
|  |  | 5. ^Temprevcomp[5] |  |
|  |  | 6. ^Temprevcomp[6] |  |
|  |  | 7. ^Temprevcomp[7] |  |
|  |  | 8. ^Temprevcomp[8] |  |
|  |  | 9. ${ }^{\wedge}$ Temprevcomp [9] <br> 10. ^Temprevcomp[10] |  |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 11. ^Temprevcomp[11] <br> 12. ^Temprevcomp[12] <br> 13. ^Temprevcomp[13] <br> 14. ^Temprevcomp[14] <br> 15. ^Temprevcomp[15] <br> 16. ^Temprevcomp[16] <br> 17. ^Temprevcomp[17] <br> 18. ^Temprevcomp[18] <br> 19. ^Temprevcomp[19] <br> 20. ^Temprevcomp[20] <br> 55. Company name not listed <br> 888. Delete the line |  |
| 04A | TELCOMP | (What is the name of the company which provides the service?\|"* Enter company name) <br> Description Amount1 Amount2 Amount3 <br> (TELCOMP) (TELCHGX1) (TELCHGX2) (TELCHGX3) <br> Enter 888 to delete the line | 888: Goto TELOTH <br> All others: IF BCeintro.BUSCREEN = 2 goto TELCHGX1 ELSE goto TELBSNS |
| 04A | TELBSNS | Will any of the charges be deducted as a business expense? <br> Description Amount1 Amount2 Amount3 <br> (TELCOMP) (TELCHGX1) (TELCHGX2) (TELCHGX3) | 1: Goto TELBSNZ <br> 2,DK,RF: Goto TELCHGX1 |
|  |  | 1. Yes <br> 2. No |  |
| 04A | 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,DK,RF: Goto TELCHGX1 <br> 100: Goto CK_TELBSNZ |
| 04A | TELCHGX1 | How much were you billed for in (reference month)? Do not include any unpaid charges from a previous billing period. <br> Description Amount1 Amount2 Amount3 <br> (TELCOMP) (TELCHGX1) (TELCHGX2) (TELCHGX3) | Goto TELCHGX2 |
| 04A | TELCHGX2 | How much were you billed for in (month)? <br> Do not include any unpaid charges from a previous billing period. | Goto TELCHGX3 |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | Description Amount1 Amount2 Amount3 $($ TELCOMP) (TELCHGX1) (TELCHGX2) (TELCHGX3) |  |
| 04A | 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 | 1-999999: IF TELCHGX1 = 0 OR TELCHGX2 $=0$ then goto BILPERD <br> ELSE goto TYPETEL |
|  |  | (TELCOMP) (TELCHGX1) (TELCHGX2) (TELCHGX3) | 0: Goto BILPERD |
|  |  |  | DK,RF: IF TELCHGX1 = 0 OR TELCHGX2 $=0$ then goto BILPERD <br> ELSE goto TYPETEL |
| 04A | BILPERD | What is your usual billing period for this service? | Goto TYPETEL |
|  |  | $\frac{\text { Description Amount1 Amount2 Amount3 }}{(\text { TELCOMP) (TELCHGX1) (TELCHGX2) (TELCHGX3) }}$ |  |
|  |  | 1. Month |  |
|  |  | 2. 2 months |  |
|  |  | 3. Quarter |  |
|  |  | 4. Annual |  |
|  |  | 5. Other |  |
| 04A | TYPETEL | [E] 9 ? [F1] | Goto TELTEMP |
|  |  | What types of telephone services did the bill include - |  |
|  |  | Read each item on list. |  |
|  |  | Enter all that apply, separate with commas. |  |
|  |  | Description Amount1 Amount2 Amount3 |  |
|  |  | (TELCOMP) (TELCHGX1) (TELCHGX2) (TELCHGX3) |  |
|  |  | 1. Residential Service including Voice over IP? <br> 2. Mobile or Cellular Service including prepaid? |  |
| 04A | TELTEMP | [49 ? [F1] | 0,77 : IF 0 only or 77 only then goto TELOTH ELSEIF 0 is selected with another option then goto |



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| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
| 04A | TCABLEX1 | How much of the (reference month) charges were for cable or satellite television service? | Goto TCABLEX2 |
|  |  | Description Amount1 Amount2 Amount3 <br> (TELCOMP) (TELCHGX1) (TELCHGX2) (TELCHGX3) |  |
| 04A | TCABLEX2 | How much of the (month) charges were for cable or satellite television service? | Goto TCABLEX3 |
|  |  | Description Amount1 Amount2 Amount3 <br> (TELCOMP) (TELCHGX1) (TELCHGX2) (TELCHGX3) |  |
| 04A | TCABLEX3 | How much of the (last month) charges were for cable or satellite television service? | IF 3 selected in TELTEMP then goto TAPPGMX1 |
|  |  | Description Amount1 Amount2 Amount3 <br> (TELCOMP) (TELCHGX1) (TELCHGX2) (TELCHGX3) | ELSE goto TELOTH |
| 04A | TAPPGMX1 | How much of the (reference month) charges were for applications, games, or ringtones? | Goto TAPPGMX2 |
|  |  | Description Amount1 Amount2 Amount3 |  |
|  |  | (TELCOMP) (TELCHGX1) (TELCHGX2) (TELCHGX3) |  |
| 04A | TAPPGMX2 | How much of the (month) charges were for applications, games, or ringtones? | Goto TAPPGMX3 |
|  |  | Description Amount1 Amount2 Amount3 <br> (TELCOMP) (TELCHGX1) (TELCHGX2) (TELCHGX3) |  |
| 04A | TAPPGMX3 | How much of the (last month) charges were for applications, games, or ringtones? | Goto TELOTH |
|  |  | Description Amount1 Amount2 Amount3 |  |
|  |  | (TELCOMP) (TELCHGX1) (TELCHGX2) (TELCHGX3) |  |
| 04A | TELOTH | Did (youlyou or any members of your household) receive any other bills for telephones not used entirely for business purposes? | 1: IF any 8500.TELCOMP = 1-20 then goto PREVCOMP, next row of the table ELSE goto TELCOMP, next row of the table |
|  |  | Description Amount1 Amount2 Amount3 (TELCOMP) (TELCHGX1) (TELCHGX2) (TELCHGX3) | 2: Goto S4A_END |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 04B | FONCARD | [19 9 | 1: Goto FONCARDX |
|  |  | Since the first of (reference month), have (youlyou or any members of your household) purchased any pre-paid long distance telephone cards/minutes, not already reported? | 2,DK,RF: Goto S4B_END |
|  |  | - Do not include prepaid cellular minutes |  |

Section CAPI Variable Name Question Text

| $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |  |  |
| :---: | :---: | :---: | :---: |
| 04B | FONCARDX | What was the total amount paid? | Goto FONCRDCX |
| 04B | FONCRDCX | How much of the total was paid this month? | Goto S4B_END |
| 04C | S4C_INTRO | [日] 9 | Goto UTI_ITEM |
|  |  | Now I am going to ask about cable and satellite TV service, satellite radio service, and internet service expenditures. |  |
|  |  | 1. Enter 1 to Continue |  |
| 04C | UTI_ITEM | [6] 9 ? [F1] | 1-4: goto INTDESC |
|  |  | Since the first of (reference month) have (youlyou or any members of your household) had any expenses for... <br> Read each item on list. | 99: Goto S4C_END <br> 888: IF no more grid lines then goto S4C_END ELSE goto UTI_ITEM - next line of table |
|  |  | 1. Cable or satellite TV services, not already reported? <br> 2. Satellite radio services? <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? <br> 99. None/ no more entries <br> 888. Delete the line |  |
| 04C | INTDESC | What was the expense for? <br> Expense Amount Month (INTSERV) (INTCHGX) (INTMO) | ```IF INTNMBR = 4 AND UTI_ITEM = 3 AND (INTPER = 201607, 201608, 201609 or training or systems test or ver test) then goto INTCOMP``` |
|  |  |  | ELSE goto INTMO |
| 04C | INTCOMP | - Ask if not apparent <br> What is the name of the company providing the internet service? | Goto INTMO |
| 04C | INTMO | In what month was the expense? | Goto INTCHGX |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | - Enter 13 for same amount each month of the reference period |  |
|  |  | Expense Amount Month <br> (INTSERV) (INTCHGX) (INTMO) |  |
|  |  | 1. January |  |
|  |  | 2. February |  |
|  |  | 3. March |  |
|  |  | 4. April |  |
|  |  | 5. May |  |
|  |  | 6. June |  |
|  |  | 7. July |  |
|  |  | 8. August |  |
|  |  | 9. September |  |
|  |  | 10. October |  |
|  |  | 11. November |  |
|  |  | 12. December |  |
|  |  | 13. Same amount each month. |  |
| 04C | INTCHGX | (What was your monthly expense?/How much was this expense?) | Goto INTCMB_S |
|  |  | Expense Amount Month <br> (INTSERV) (INTCHGX) (INTMO) |  |
| 04C | INTCMB_S | - Enter 'C' for combined expenses. | C: Goto INTCMB |
|  |  |  | EMPTY: Goto INTMORE |
| 04C | INTCMB | [d9 ? [F1] | Goto INTMORE |
|  |  | What was (Description) combined with? |  |
|  |  | - Enter all that apply, separate with commas. |  |
|  |  | $\begin{array}{ll} \text { Expense } & \text { Amount Month } \\ \text { (INTSERV) } & \text { (INTCHGX) (INTMO) } \end{array}$ |  |
|  |  | 1. Cable or satellite TV services |  |
|  |  | 2. Satellite radio services |  |
|  |  | 3. Internet connection or an internet service provider |  |
|  |  | 4. Internet services away from home such as web cafes or internet kiosks |  |
| 04C | INTMORE | Did you have any other expenses for (Description)? | 1: goto UTI_ITEM, next row |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | Expense Amount Month <br> (INTSERV) (INTCHGX) (INTMO) | 2,DK,RF: Goto UTI_ITEM, next row of table |
|  |  | 1. Yes <br> 2. No |  |
| 04D | S4D_INTRO | [4] 10 | Goto UTC_ITEM |
|  |  | Now I am going to ask about utility bills. <br> Prop \# Property Description Company Name Utility Amount1 Amount2 Amount3 <br> (WHATPROP) (UTLPDESC) (COMPNAME) (UTILY) (UTLCHGX1)(UTLCHGX2) <br> (UTLCHGX3) |  |
|  |  | 1. Enter 1 to Continue |  |
| 04D | UTC_ITEM | [2] 10 ? [F1] | 1-9: goto WHATPROP |
|  |  | Since the first of (reference month), have (youlyou or any members of your household) 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: | 99: Goto S4D_END <br> 888: Goto next row of table |
|  |  | 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 and sewerage maintenance <br> 7. Garbage and recycling collection <br> 8. Water softening service <br> 9. Septic tank cleaning <br> 99. None/No more entries <br> 888. Delete the line |  |
| 04D | WHATPROP | Which property was the bill for? <br> 1. ^Prop_display[1] <br> 2. ^Prop_display[2] | 1-20,40: IF UTC_ITEM = 1-3, 6-7 and no data in any 8500.COMPNAME [1]-[40] then goto COMPNAME <br> ELSEIF UTC_ITEM = 1-3, 6-7 and any data in 8500.COMPNAME [1]-[40] then goto LASTCOMP ELSEIF BCeintro.BUSCREEN $=2$ goto |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 3. ^Prop_display[3] | UTLCHGX1 |
|  |  | 4. ^Prop_display[4] | ELSE goto UTILBUSN |
|  |  | 5. ^Prop_display[5] |  |
|  |  | 6. ^Prop_display[6] | 41,42,43,DK,RF: Goto UTLPDESC |
|  |  | 7. ^Prop_display[7] |  |
|  |  | 8. ^Prop_display[8] |  |
|  |  | 9. ^Prop_display[9] |  |
|  |  | 10. ^Prop_display[10] |  |
|  |  | 11. ^Prop_display[11] |  |
|  |  | 12. ^Prop_display[12] |  |
|  |  | 13. ^Prop_display[13] |  |
|  |  | 14. ^Prop_display[14] |  |
|  |  | 15. ^Prop_display[15] |  |
|  |  | 16. ^Prop_display[16] |  |
|  |  | 17. ^Prop_display[17] |  |
|  |  | 18. ^Prop_display[18] |  |
|  |  | 19. ^Prop_display[19] |  |
|  |  | 20. ^Prop_display[20] |  |
|  |  | 40. ^Prop_display[40] |  |
|  |  | 41. ^Prop_display[41] |  |
|  |  | 42. Rented vacation Property |  |
|  |  | 43. Property not owned or rented by household |  |
| 04D | UTLPDESC | Briefly describe the property. | IF UTC_ITEM = 1-3, 6-7 AND no data in any 8500.COMPNAME [1]-[40] then goto COMPNAME |
|  |  |  | ELSEIF UTC_ITEM = 1-3, 6-7 and any data in 8500.COMPNAME [1]-[40] then goto LASTCOMP |
|  |  |  | ELSEIF BCeintro.BUSCREEN = 2 goto UTLCHGX1 |
|  |  |  | ELSE goto UTILBUSN |
| 04D | LASTCOMP | What is the name of the company or government agency which provides (Utility description)? | 1-20: IF BCeintro.BUSCREEN $=2$ goto UTLCHGX1 ELSE goto UTILBUSN |
|  |  | Prop \# Property Description Company Name Utility Amount1 Amount2 Amount3 | 55: Goto COMPNAME |
|  |  | (WHATPROP)(UTLPDESC) (COMPNAME) (UTILY) (UTLCHGX1)(UTLCHGX2) (UTLCHGX3) |  |
|  |  | 1. ${ }^{\wedge}$ Comp_display[1] <br> 2. ^Comp_display[2] |  |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 3. ^Comp_display[3] |  |
|  |  | 4. ^Comp_display[4] |  |
|  |  | 5. ^Comp_display[5] |  |
|  |  | 6. ^Comp_display[6] |  |
|  |  | 7. ^Comp_display[7] |  |
|  |  | 8. ^Comp_display[8] |  |
|  |  | 9. ^${ }^{\wedge}$ Comp_display[9] |  |
|  |  | 10. ^Comp_display[10] |  |
|  |  | 11. ${ }^{\wedge}$ Comp_display[11] |  |
|  |  | 12. ${ }^{\wedge}$ Comp_display[12] |  |
|  |  | 13. ^Comp_display[13] |  |
|  |  | 14. ^Comp_display[14] |  |
|  |  | 15. ^Comp_display[15] |  |
|  |  | 16. ^Comp_display[16] |  |
|  |  | 17. ^Comp_display[17] |  |
|  |  | 18. ^Comp_display[18] |  |
|  |  | 19. ^Comp_display[19] |  |
|  |  | 20. ^Comp_display[20] |  |
|  |  | 55. Company name not listed |  |
| 04D | COMPNAME | What is the name of the company or government agency which provides (Utility description)? | IF BCeintro.BUSCREEN = 2 goto UTLCHGX1 ELSE goto UTILBUSN |
|  |  | Prop \# Property Description Company Name Utility Amount1 Amount2 Amount3 |  |
|  |  | (WHATPROP) (UTLPDESC) (COMPNAME) (UTILY) (UTLCHGX1)(UTLCHGX2) (UTLCHGX3) |  |
| 04D | UTILBUSN | Will any part of the (Utility Description) charges be deducted as a business expense? | Goto UTLCHGX1 |
|  |  | Prop \# Property Description Company Name Utility Amount1 Amount2 Amount3 |  |
|  |  | (WHATPROP) (UTLPDESC) (COMPNAME) (UTILY) (UTLCHGX1)(UTLCHGX2) (UTLCHGX3) |  |
|  |  | 1. Yes |  |
|  |  | 2. No |  |
| 04D | UTLCHGX1 | How much were you billed for in (reference month)? | Goto UTILCHGX2 |
|  |  | Prop \# Property Description Company Name Utility Amount1 Amount2 Amount3 |  |
|  |  | (WHATPROP) (UTLPDESC) (COMPNAME) (UTILY) (UTLCHGX1)(UTLCHGX2) (UTLCHGX3) |  |
| 04D | UTLCHGX2 | How much were you billed for in (month)? | Goto UTILCHGX3 |



## What other utilities, fuels, or services was (Utility Description) combined with?

- Enter all that apply, separate with commas.

Prop \# Property Description Company Name Utility Amount1 Amount2 Amount3 (WHATPROP)(UTLPDESC) (COMPNAME) (UTILY) (UTLCHGX1)(UTLCHGX2) (UTLCHGX3)


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

[甽 12 ? [F1]
Now, let's talk about maintenance and repairs for property you (owned/rent/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.I )2

- Read each item on list.

SCREEN 3--
[1] 11-12 ? [F1]

Have there been any expenses for any other property, such as property that you do not (owned/rent/own or rent)
paid for by (youlyou or any members of your household)?

- If Yes -

Which type of job were those expenses for?

1. ^S5a_Fill1
2. ^S5a-Fill2
3. ^S5a-Fill3
4. S5a_Fill
5. ^S5a_Fill
6. ^S5a Fill5
7. ^S5a Fill6
8. ^S5a Fill
9. ^S5a_Fill8
10. ^S5a_Fill9
11. ^S5a Fill10
12. ^S5a-Fill11
13. ^S5a_Fill1
14. ^S5a_Fill12
15. ^S5a_Fill13
16. ^S5a Fill14
17. ^S5a Fill15
18. ^S5a_Fill1
19. ^S5a_Fill17
20. ^S5a_Fill18

| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 19. ^S5a_Fill19 |  |
|  |  | 95. Continue List |  |
|  |  | 99. None/No more entries |  |
|  |  | 888. Delete the line |  |
| 05 | CRMPROPI | On which property was the work done? | 1-20: goto WRKDESC |
|  |  |  | 97: Goto WRKDESC |
|  |  | Prop Description Work Desc |  |
|  |  | (WRKDESC) (PRP5DESC) | 98,99,DK,RF: Goto PRP5DESC |
|  |  | 1. ^tempprop[1] |  |
|  |  | 2. ^tempprop[2] |  |
|  |  | 3. ^tempprop[3] |  |
|  |  | 4. ^tempprop[4] |  |
|  |  | 5. ^tempprop[5] |  |
|  |  | 6. ^tempprop[6] |  |
|  |  | 7. ^tempprop[7] |  |
|  |  | 8. ^tempprop[8] |  |
|  |  | 9. ^tempprop[9] |  |
|  |  | 10. ^tempprop[10] |  |
|  |  | 11. ^tempprop[11] |  |
|  |  | 12. ^tempprop[12] |  |
|  |  | 13. ^tempprop[13] |  |
|  |  | 14. ^tempprop[14] |  |
|  |  | 15. ^tempprop[15] |  |
|  |  | 16. ^tempprop[16] |  |
|  |  | 17. ^tempprop[17] |  |
|  |  | 18. ^Property[18] |  |
|  |  | 19. ^Property[19] |  |
|  |  | 20. ^tempprop[20] |  |
|  |  | 97. ^tempprop[21] |  |
|  |  | 98. ^tempprop[22] |  |
|  |  | 99. Property not owned or rented by household |  |
| 05 | PRP5DESC | Briefly describe the property. | Goto WRKDESC |
|  |  | Prop Description Work Desc |  |
|  |  | (WRKDESC) (PRP5DESC) |  |
| 05 | WRKDESC | What work was done? | IF CRB_ITEM = 1, 3 or 5 then goto S5BCMB_S |
|  |  | The description should be adequate to classify "alteration", "repair", etc., and to identify in next | ELSEIF CRB_ITEM $=2,4,6$ or 8 then goto TEMPCODE |



- Enter all that apply, separate with commas.

| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 1. Homes under construction <br> 2. Building an addition <br> 3. Finishing a basement <br> 4. Remodeling <br> 5. Landscaping <br> 6. Building outdoor patios <br> 7. Repair outdoor patios <br> 8. Painting/wallpapering <br> 9. Plastering or paneling <br> 10. Plumbing <br> 11. Electrical work <br> 12. Heat or air conditioning <br> 13. Flooring installation/repair/replacement <br> 14. Insulation <br> 15. Roofing, gutters or downspouts <br> 16. Siding <br> 17. Install/Repair/Replace windows, etc <br> 18. Masonry, brick or stucco <br> 19. Other improvements or repairs <br> 77. Misc. combined (unable to specify/DK) |  |
| 05 | CONTRACT | Did you do 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,DK,RF: Goto CRMMATER <br> 2,3: Goto CNTRCTX3 |
| 05 | CNTRCTX3 | What did you pay in (reference month) to someone else for this job? <br> Prop Description Work Desc <br> (WRKDESC) (PRP5DESC) | Goto CNTRCTX2 |
| 05 | CNTRCTX2 | What did you pay in (month) to someone else for this job? <br> Prop Description Work Desc <br> (WRKDESC) (PRP5DESC) | Goto CNTRCTX1 |
| 05 | CNTRCTX1 | What did you pay in (last month) to someone else for this job? | Goto CNTRCTX0 |

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| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
| 05 | CNTRCTXO | How much was paid this month? <br> Prop Description Work Desc <br> (WRKDESC) (PRP5DESC) | IF (CNTRCTX3 = DK or CNTRCTX2 = DK or CNTRCTX1 $=$ DK or CNTRCTX0 $=$ DK then goto CONTRCTX <br> ELSEIF ITEM = 1-4, 10-12 or 19 then goto MAJ_APPL <br> ELSE goto CRMMATER |
| 05 | CONTRCTX | Since the first of (reference month), what is the total amount you paid to someone else for this job? | IF ITEM = 1-4, 10-12 or 19 then goto MAJ_APPL Else goto CRMMATER |
| 05 | MAJ_APPL | 13 ? [F1] <br> Did any of the cost since (reference month) include the cost of any appliances or equipment? <br> 1. Yes <br> 2. No | 1: Goto APP_SCR <br> 2,DK,RF: Goto CRMMATER |
| 05 | APP_SCR | 13 ? [F1] <br> 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 or dryer <br> 8. Range hood <br> 9. Smoke alarms and detectors <br> 10. Window air conditioner | $\begin{array}{ll} \text { 1-13; } & \text { Goto APPL_X1 } \\ \text { DK: } & \text { Goto CRMMATER } \end{array}$ |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 11. Portable cooling and heating equipment <br> 12. Lamps, lighting fixtures, or ceiling fans <br> 13. Other major home appliances and equipment |  |
| 05 | APPL_X1 | What was the total cost for (description)? | 1-999999: IF there is a second selection in APP_SCR then goto APPL_X2 <br> ELSE goto CRMMATER |
|  |  |  | DK,RF: IF there is a second selection in APP_SCR then goto APPL_X2 <br> ELSE goto CRMMATER |
| 05 | APPL_X2 | What was the total cost for (description)? | 1-999999: IF there is a third selection in APP_SCRthen goto APPL_X3 <br> ELSE goto CRMMATER |
|  |  |  | DK,RF: IF there is a third selection in APP_SCR then goto APPL_X3 <br> ELSE goto CRMMATER |
| 05 | APPL_X3 | What was the total cost for (description)? | 1-999999: IF there is a fourth selection in APP_SCR then goto APPL_X4 |
|  |  | Prop Description Work Desc <br> (WRKDESC) (PRP5DESC) | ELSE goto CRMMATER |
|  |  |  | DK,RF: IF there is a fourth selection in APP_SCR then goto APPL_X4 <br> ELSE goto CRMMATER |
| 05 | APPL_X4 | What was the total cost for (description)? | 1-999999: IF there is a fifth selection in APP_SCR then goto APPL_X5 |
|  |  | Prop Description Work Desc <br> (WRKDESC) (PRP5DESC) | ELSE goto CRMMATER |
|  |  |  | DK,RF: IF there is a fifth selection in APP_SCR then goto APPL_X5 <br> ELSE goto CRMMATER |
| 05 | APPL_X5 | What was the total cost for (description)? | 1-999999: IF there is a sixth selection in APP_SCR then goto APPL_X6 |
|  |  | $\frac{\text { Prop Description Work Desc }}{\text { (WRKDESC) } \quad \text { (PRP5DESC) }}$ | ELSE goto CRMMATER |
|  |  |  | DK,RF: IF there is a sixth selection in APP_SCR then goto APPL_X6 <br> ELSE goto CRMMATER |
| 05 | APPL_X6 | What was the total cost for (description)? | Goto CRMMATER |
|  |  | Prop Description Work Desc |  |

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| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | (WRKDESC) (PRP5DESC) |  |
| 05 | CRMMATER | Since the first of (reference month), have (youlyou or any members of your household) PURCHASED any materials, supplies, tools or equipment for doing this job? | 1: Goto SUPPLYX3 |
|  |  | $\frac{\text { Prop Description Work Desc }}{\text { (WRKDESC) } \quad \text { (PRP5DESC) }}$ | 2,DK,RF: Goto TOOLRENT |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 05 | SUPPLYX3 | What was the total cost for all items (youlyour household) purchased for this job in (reference month)? | Goto SUPPLYX2 |
|  |  | Prop Description Work Desc <br> (WRKDESC) (PRP5DESC) |  |
| 05 | SUPPLYX2 | What was the total cost for all items (youlyour household) purchased for this job in (month)? | Goto SUPPLYX1 |
|  |  | Prop Description Work Desc <br> (WRKDESC) (PRP5DESC) |  |
| 05 | SUPPLYX1 | What was the total cost for all items (youlyour household) purchased for this job in (last month)? | Goto SUPPLYX0 |
|  |  | $\frac{\text { Prop Description Work Desc }}{\text { (WRKDESC) (PRP5DESC) }}$ |  |
| 05 | SUPPLYX0 | What was the total cost for all items (youlyour household) purchased for this job in (current month)? | IF SUPPLYX3 = D or SUPPLYX2 = D or SUPPLYX1 = D or SUPPLYXO = D then goto SUPPLYX |
|  |  | Prop Description Work Desc (WRKDESC) (PRP5DESC) | ELSE goto TOOLRENT |
| 05 | SUPPLYX | Since the first of (reference month), what was the total cost of all items (youlyour household) purchased for this job? | Goto TOOLRENT |
|  |  | Prop Description Work Desc <br> (WRKDESC) (PRP5DESC) |  |
| 05 | TOOLRENT | Since the first of (reference month), have (youlyou or any members of your household) RENTED any tools or equipment for doing this job? | 1: Goto TOOLRTX3 |
|  |  | $\frac{\text { Prop Description Work Desc }}{\text { (WRKDESC) }}$ | 2,DK,RF: Goto REIMBRS |

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| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 1. Yes |  |
| 05 | TOOLRTX3 | What was the total cost for all items (youlyour household) rented for this job in (reference month)? | Goto TOOLRTX2 |
|  |  | Prop Description Work Desc <br> (WRKDESC) (PRP5DESC) |  |
| 05 | TOOLRTX2 | What was the total cost for all items (youlyour household) rented for this job in (month)? <br> Prop Description Work Desc <br> (WRKDESC) (PRP5DESC) | Goto TOOLRTX1 |
| 05 | TOOLRTX1 | What was the total cost for all items (youlyour household) rented for this job in (last month)? | Goto TOOLRTX0 |
| 05 | TOOLRTX0 | What was the total cost for all items (you/your household) rented for this job in (current month)? <br> Prop Description Work Desc <br> (WRKDESC) (PRP5DESC) | IF (TOOLRTX3 = D or TOOLRTX2 = D or TOOLRTX1 = D or TOOLRTX0 = D ) then goto TOOLRTX <br> ELSE goto REIMBRS |
| 05 | TOOLRTX | Since the first of (reference month), what was the total cost for all items (youlyour household) rented for this job? <br> Prop Description Work Desc <br> (WRKDESC) (PRP5DESC) | Goto REIMBRS |
| 05 | REIMBRS | Was or will any of the total cost of this job be reimbursed or paid by someone outside of your household? <br> 1. Yes <br> 2. No | 1: Goto REIMBRSZ <br> 2,DK,RF: IF BUSCREEN = 2 then goto ANY5MORE ELSE goto CRMBSNSD |
| 05 | REIMBRSZ | What percent of the total cost was or will be reimbursed or paid by someone outside of your household? | 1-99,DK,RF: IF.BUSCREEN = 2 then goto ANY5MORE ELSE goto CRMBSNSD <br> 100: Goto ERR2_REIMBRSZ |
| 05 | CRMBSNSD | Were or will any of these expenses for this job be deducted as a business expense? | 1: Goto CRMBSNSZ |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | Prop Description Work Desc (WRKDESC) (PRP5DESC) | 2,DK,RF: Goto ANY5MORE |
|  |  | 1. Yes <br> 2. No |  |
| 05 | CRMBSNSZ | What percent was or will be deducted? | 1-99,DK,RF: Exit block and goto ANY5MORE |
|  |  | $\frac{\text { Prop Description Work Desc }}{\text { (WRKDESC) }}$ | 100: Goto ERR2_CRMBSNSZ |
| 05 | ANY5MORE | Did you have any other expenses for ^S5_desc? | Goto CRB_ITEM, next row |
|  |  | 1. Yes <br> 2. No |  |
| 05 | ADVMATER | 11-12 | 1: Goto ADVDESC <br> 2,DK,RF: Goto MATNSPEC |
|  |  | Since the first of (reference month), excluding this month, have (youlyou or any members of your household) purchased any materials or supplies for JOBS NOT YET STARTED? |  |
|  |  | 1. Yes <br> 2. No |  |
| 05 | ADVDESC | What kind of job will the materials be used for? <br> - Enter a brief description. | Goto JOBCODE |
| 05 | JOBCODE | [E] 11-12 ? [F1] <br> - Select a job type below. <br> 1. Homes under construction <br> 2. Building an addition <br> 3. Finishing a basement <br> 4. Remodeling <br> 5. Landscaping <br> 6. Build outdoor patios <br> 7. Repair outdoor patios | Goto ADVMATX |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 8. Painting/wallpapering <br> 9. Plastering or paneling <br> 10. Plumbing <br> 11. Electrical work <br> 12. Heat or air conditioning <br> 13. Flooring installation/repair/replacement <br> 14. Insulation <br> 15. Roofing, gutters or downspouts <br> 16. Siding <br> 17. Install/Repair/Replace windows, etc <br> 18. Masonry, brick or stucco <br> 19. Other improvements or repairs |  |
| 05 | ADVMATX | What was the total cost of these materials and supplies? | Goto S5ACMB_S |
| 05 | S5ACMB_S | - Enter 'C' for a combined expense | C: Goto S5A_COMB Empty: Goto MATNSPEC |
| 05 | S5A_COMB | [EH 11-12 ? [F1] <br> What other work will be included in this job? <br> Enter all that apply, separate with commas. <br> 1. Homes under construction <br> 2. Building an addition <br> 3. Finishing a basement <br> 4. Remodeling <br> 5. Landscaping <br> 6. Building outdoor patios <br> 7. Repair outdoor patios <br> 8. Painting/wallpapering <br> 9. Plastering or paneling <br> 10. Plumbing <br> 11. Electrical work <br> 12. Heat or air conditioning <br> 13. Flooring installation/repair/replacement <br> 14. Insulation <br> 15. Roofing, gutters or downspouts <br> 16. Siding <br> 17. Install/Repair/Replace windows, etc <br> 18. Masonry, brick or stucco | Goto MATNSPEC |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 19. Other improvements or repairs 77. Misc. combined (unable to specify/DK) |  |
| 05 | MATNSPEC | Since the first of (reference month), excluding this month, have (youlyou or any members of your household) purchased any materials or supplies NOT FOR ANY SPECIFIC JOB? | 1: Goto MATNSPCX 2,DK,RF: Goto S5_END |
|  |  | 1. Yes <br> 2. No |  |
| 05 | MATNSPCX | What was the total cost? | Goto S5_END |
| 06A | S6A_INTRO | [眐 14 | Goto APA_ITEM |
|  |  | Now I am going to ask about the purchase or rental of major household appliances. Please include any shipping and handling charges with the cost of any item that was shipped. <br> Description Type $\qquad$ Month Amount <br> (MAJTYPE) (Purchased/ (MAJ_MO) (MAJPURX/ <br> Rented) <br> MAJRENTX) |  |
|  |  | 1. Enter 1 to Continue |  |
| 06A | APA_ITEM | [EH 14 ? [F1] <br> Since the first of (reference month), have (youlyou or any members of your household) purchased or rented any of the following items for your household or for someone outside of your household? <br> - Read each item on list. <br> 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 or dryer <br> 99. None/No more entries <br> 888. Delete the line | 1-8: goto MAJTYPE <br> 99: Goto S6A_END <br> 888: IF no more grid lines then goto S6A_END ELSE goto APA_ITEM - next line of grid |

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| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
| 06A | MAJTYPE | What did you purchase(or rent/ )? | Goto GFTC_MAJ |
|  |  | - Enter brief description of the item |  |
|  |  | Description Type Month Amount |  |
|  |  | (MAJTYPE) (Purchased/ (MAJ_MO) (MAJPURX/ Rented) MAJRENTX |  |
| 06A | GFTC_MAJ | Was this item - | 1,3,DK,RF: Goto MAJ_MO |
|  |  | Description Type Month Amount | 2: Goto MAJ_AMOUNT |
|  |  | (MAJTYPE) (Purchased/ (MAJ_MO) (MAJPURX/ <br> Rented) <br> MAJRENTX |  |
|  |  | 1. Purchased for someone inside the household? |  |
|  |  | 2. ^S6ARENT |  |
|  |  | 3. Purchased for someone outside your household? |  |
| 06A | MAJ_MO | When did you purchase it? | Goto MAJ_AMOUNT |
|  |  | Description Type Month Amount |  |
|  |  | (MAJTYPE) (Purchased/ (MAJ_MO) (MAJPURX/ <br> Rented) MAJRENTX |  |
|  |  | 1. January |  |
|  |  | 2. February |  |
|  |  | 3. March |  |
|  |  | 4. April |  |
|  |  | 5. May |  |
|  |  | 6. June |  |
|  |  | 7. July |  |
|  |  | 8. August |  |
|  |  | 9. September |  |
|  |  | 10. October |  |
|  |  | 11. November |  |
|  |  | 12. December |  |
| 06A | MAJ_AMOUNT | (What was the total rental expense since the first of (reference month) not including (current month | 1-999999: Goto MAJTAX |
|  |  |  | DK,RF: Goto INSTALL |
|  |  | Description Type Month Amount |  |
|  |  | (MAJTYPE) (Purchased/ (MAJ_MO) (MAJPURX/ Rented) MAJRENTX |  |
| 06A | MAJTAX | Did this include sales tax? | Goto INSTALL |



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| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
| 06A | MAJOTHER | Did you purchase(or rent/ ) any other (Appliance Description)? | 1: Goto APA_ITEM, next row of grid |
|  |  | Description Type Month Amount (MAJTYPE) (Purchased/ (MAJ_MO) (MAJPURX/ Rented) MAJRENTX | 2,DK,RF: IF Row number = 7 then goto S6A_END ELSE goto APA_ITEM, next row of grid |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 06B | S6B_INTRO | [15-20 | Goto APB_ITEM |
|  |  | Now I am going to ask about expenses for the purchase 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. |  |
|  |  | 1. Enter 1 to Continue |  |
| 06B | APB_ITEM |  | 1-37: Goto MINTYPE |
|  |  | SCREEN 1 <br> [相 15 ? [F1] | 95: Goto APB_ITEM - next line of grid |
|  |  | Since the first of (reference month), have (youlyou or any members of your household) purchased or rented any of the following items? | 99: Goto S6B_END |
|  |  | Read each item on list | 888: IF no more grid lines then goto S6B_END ELSE goto APB_ITEM - next line of grid |
|  |  | SCREEN 2 |  |
|  |  | [E] 16 ? [F1] |  |
|  |  | Have (youlyou or any members of your household) purchased or rented any -- <br> - Read each item on list |  |
|  |  | SCREEN 3---------------------------------- |  |

[17 17 ? [F1]
Have (youlyou or any members of your household) purchased or rented any --

- Read each item on list


## SCREEN 4

[E] 18 ? [F1]
Have (youlyou or any members of your household) purchased or rented any --

- Read each item on list

Screen 5-
[19 19 ? [F1]
Have (youlyou or any members of your household) purchased or rented any --

- Read each item on list

Screen 6-
[EA 20 ? [F1]
Have (youlyou or any members of your household) purchased any --

- Read each item on list.

1. Small electrical kitchen appliances
2. Electrical personal care appliances
3. Electrical floor cleaning equipment
4. Other household appliances
5. Sewing machines
6. GPS devices, calculators, and fax machines
7. Digital book readers or tablets

| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 8. Computer software including computer games^FOR_NON_BUS |  |
|  |  | 10. Computer accessories |  |
|  |  | 11. Portable memory, such as flash drives, memory cards, and recordable discs and tapes |  |
|  |  | 12. Video game hardware or accessories |  |
|  |  | 13. Telephones or accessories |  |
|  |  | 14. Photographic equipment |  |
|  |  | 15. Musical instruments, supplies, or accessories |  |
|  |  | 16. Lawn mowing machinery or other yard equipment |  |
|  |  | 17. Power tools |  |
|  |  | 18. Non-power tools |  |
|  |  | 19. Window air conditioners |  |
|  |  | 20. Portable cooling or heating equipment |  |
|  |  | 21. Televisions, all types including those installed in vehicles |  |
|  |  | 22. DVD players, VCRs, DVRs, or video cameras |  |
|  |  | 23. Satellite dishes, receivers or accessories |  |
|  |  | 24. Handheld personal music players |  |
|  |  | 25. Stereos, radios, speakers, and sound components, including those installed in vehicles |  |
|  |  | 26. Other sound or video equipment, including accessories |  |
|  |  | 27. General sports equipment (exclude athletic shoes for sports related use, such as football, baseball, soccer or bowling) |  |
|  |  | 28. Health and exercise equipment |  |
|  |  | 29. Camping equipment |  |
|  |  | 30. Hunting and fishing equipment, including all guns |  |
|  |  | 31. Winter sports equipment |  |
|  |  | 32. Water sports equipment |  |
|  |  | 33. Outboard motors |  |
|  |  | 34. Bicycles or bicycle equipment |  |
|  |  | 35. Tricycles or battery powered riders |  |
|  |  | 36. Playground equipment |  |
|  |  | 37. Other sports or recreation equipment |  |
|  |  | 95. Continue list |  |
|  |  | 99. None/No more entries |  |
|  |  | 888. Delete the line |  |
| 06B | MINTYPE | What did you purchase(or rent/ )? | Goto GFTCMIN |
|  |  | - Enter a brief description of item. |  |
|  |  | (* Report items such as flash drives, memory cards, recordable discs, and tapes as code 13, Portable memory cards, recordable discs, and tapes as cod |  |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
| (MINTYPE) (Purchased/ (MIN_MO) (MINPURX/Rented) MINRENTX) |  |  |  |
| 06B | GFTCMIN | Was this item ... | 1,3,DK,RF: Goto MIN_MO |
|  |  | 1. Purchased for someone inside the household? <br> 2. ^S6BRENT <br> 3. Purchased for someone outside your household? | 2: Goto MIN_AMOUNT |
| 06B | MIN_MO | When did you purchase it? | Goto MIN_AMOUNT |
|  |  | Description Type Month Amount (MINTYPE) (Purchased/ (MIN_MO) (MINPURXI Rented) MINRENTX) |  |
|  |  | 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 |  |
| 06B | MIN_AMOUNT | (What was the total rental expense since the first of (reference month) not including (current month)?/What did it cost?) | 1-999999: Goto MINTAX |
|  |  | Description Type Month Amount MINTYPE) (Purchased/ (MIN_MO) (MINPURX/ Rented) | DK,RF: Goto MINCMB_S |
| 06B | MINTAX | Did this include sales tax? | Goto MINCMB_S |
|  |  | Description Type Month Amount (MINTYPE) (Purchased/ (MIN_MO) (MINPURX/ Rented) MINRENTX) |  |
|  |  | 1. Yes <br> 2. No |  |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
| 06B | MINCMB_S | - Enter 'C' for a combined expense. | C: Goto MINCMB |
|  |  |  | empty: IF APB_ITEM = 8, 21, 23, 25, or 26 then goto INSTLSCR <br> ELSE goto S6BOTHER |
| 06B | MINCMB | [E] 15-20 ? [F1] | IF ITEM $=8,21,23,25,26$ then goto INSTLSCR ELSE goto S6BOTHER |

## What other item is the (Item description) combined with?

1. Small electric kitchen appliances
2. Electric personal care appliances
3. Electric floor cleaning equipment
4. Other household appliances
5. Other household appliances
6. Sewing machines
7. GPS devices, calculators, and fax machines
8. Digital book readers or tablets
9. Computers, computer systems, or related hardware
10. Computer software including computer games^FOR_NON_BUS
11. Computer accessories
12. Portable memory such as flash drives, memory cards, and recordable discs and tapes
13. Video game hardware or accessories
14. Telephones or accessories
15. Photographic equipment
16. Musical instruments, supplies, or accessories
17. Lawn mowing machinery, or other yard equipment
18. Power Tools
19. Non-power tools
20. Window air conditioners
21. Portable cooling or heating equipment
22. Televisions, all types including those installed in vehicles
23. DVD Players, VCRs, DVRs, or video cameras
24. Satellite dishes, receivers or accessories
25. Handheld personal music players
26. Stereos, radios, speakers, and sound components, including those installed in vehicles 26. Other sound or video equipment including accessories
27. General sports equipment (exclude athletic shoes for sports related use, such as football,
baseball, soccer or bowling)
28. Health and exercise equipment

| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 29. Camping equipment <br> 30. Hunting and fishing equipment, including all guns <br> 31. Winter sports equipment <br> 32. Water sports equipment <br> 33. Outboard motors <br> 34. Bicycles or bicycle equipment <br> 35. Tricycles or battery powered riders <br> 36. Playground equipment <br> 37. Other sports or recreation equipment <br> 77. Misc. combined (unable to specify/DK) |  |
| 06B | INSTLSCR | Were there any additional charges for installation or set-up? | 1: Goto INSTLLEX |
|  |  | Description Type Month Amount (MINTYPE) (Purchased/ (MIN_MO) (MINPURX/ Rented) MINRENTX) | 2,DK,RF: IF INTNMBR $=4$ AND ITEM $=21$ AND (INTPER = 201607, 201608, 201609, 201406, 201407 or 201409) then goto TVSTORE <br> ELSE goto MORE |
|  |  | 1. Yes <br> 2. No |  |
| 06B | INSTLLEX | How much? <br> Description Type Month Amount <br> (MINTYPE) (Purchased/ (MIN_MO) (MINPURX/ Rented) MINRENTX) | 1-99999: IF INSTLLEX It 40 or gt 1000 then goto ERR1_INSTLLEX <br> ELSEIF INTNMBR $=4$ AND ITEM $=21$ AND (INTPER = 201607, 201608, 201609, 201406, 201407 or 201409) then goto TVSTORE ELSE goto MORE |
|  |  |  | DK,RF: IF INTNMBR $=4$ AND ITEM $=21$ AND (INTPER = 201607, 201608, 201609, 201406, 201407 or 201409)) then goto TVSTORE <br> ELSE goto MORE |
| 06B | TVSTORE | Where did you purchase this television? <br> Enter store, website, or company name If purchased from a private individual, enter "private individual." | ```IF ENTRY contains ".com", ".Com", ".cOm", ".coM", ".COm", ".CoM", ".cOM", or ".COM", then goto MORE ELSEIF ENTRY = DK or RF then goto MORE``` |
|  |  |  | ELSE goto TVPURCH |
| 06B | TVPURCH | - Ask if not apparent | 1,DK,RF: Goto MORE |
|  |  | Was this purchased online or in-person? | 2: Goto TVPURLOC |

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| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
| 06B | TVPURLOC | Where is ^TVSTORE_fill located? | Goto MORE |
| - Enter city and state |  |  |  |
| 06B | S6BOTHER | Did you purchase(or rent/ ) any other (description)? | 1: Goto APB_ITEM, next line on the grid |
|  |  | Description Type Month Amount (MINTYPE) (Purchased/ (MIN_MO) (MINPURX/ Rented) MINRENTX) | 2,DK,RF: IF row number $=34$ then goto S6B_END ELSE goto APB_ITEM, next line on the grid |
| 1. Yes <br> 2. No |  |  |  |
| 07 | S7_INTRO | [E] 21 | Goto EQB_ITEM |
| Now I will ask about expenditures for household item maintenance or repairs and service contracts. |  |  |  |
| $\frac{\text { Description Month Amount }}{(\text { RPRDESC ) (SRVCMOB) (REPAIRX) }}$ |  |  |  |
| 1. Enter 1 to Continue |  |  |  |
| 07 | EQB_ITEM | [12 21 ? [F1] | 1-11: Goto RPRDESC |
|  |  | Since the first of (reference month), did (youlyou or any members of your household) have any expenses for service contracts, maintenance, or repairs for any of the following items? | 95: Goto next row |
|  |  | - Read each item on list | 888: IF ROW number = 13 then goto S7_END ELSE goto APB_ITEM - next line of grid |
|  |  | 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, including those installed in autos or other vehicles <br> 4. Computers, computer systems, or related equipment for non-business use |  |
|  |  | 5. Lawn or garden equipment |  |
|  |  | 6. Musical instruments or accessories <br> 7. Hand or power tools |  |
|  |  | 8. Photographic equipment |  |
|  |  | 9. Sport or recreational equipment |  |
|  |  | 10. Termite or pest control |  |
|  |  | 11. Heating or air conditioning service contracts <br> 99. None/No more entries |  |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 888. Delete the line |  |
| 07 | RPRDESC | What did the service contract(or repairl) cover? | Goto SRVCMOB |
|  |  | Description Month Amount <br> (RPRDESC) (SRVCMOB) (REPAIRX) |  |
| 07 | SRVCMOB | In what month was the expense? | Goto REPAIRX |
|  |  | Description Month Amount (RPRDESC) (SRVCMOB) (REPAIRX) |  |
|  |  | 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 |  |
| 07 | REPAIRX | What was the total cost? | 1-999999: Goto REPAIRTX |
|  |  | Description Month Amount (RPRDESC) (SRVCMOB) (REPAIRX) | DK,RF: Goto RPRCB_S |
| 07 | REPAIRTX | Did this include sales tax? | Goto RPRCB_S |
|  |  | Description Month Amount (RPRDESC) (SRVCMOB) (REPAIRX) |  |
|  |  | 1. Yes <br> 2. No |  |
| 07 | RPRCB_S | * Enter 'C' for a combined expense. | C: Goto REPAIRCM |
|  |  |  | Empty: Goto RPRMORE |
| 07 | REPAIRCM | [2] 21 ? [F1] <br> What other service contracts, maintenance, or re with? | Goto RPRMORE |



Since the first of (reference month), have (you/you or any members of your
household) purchased for (youlyour household) or for someone outside of your household
any --

- Read each item on list


## SCREEN 2

县 23 ? [F1]
Have (youlyou or any members of your household) purchased any --

- Read each item on list

SCREEN 3
[㨁 24 ? F 1$]$
Have (you/you or any members of your household) purchased any --

- Read each item on list

SCREEN 4
[ET 25 ? [F1]
Have (you/you or any members of your household) purchased any --

- Read each item on list


## 1. Sofas?

2. Living room chairs?
3. Living room tables?
4. Ping-pong, pool tables or other similar recreation room items?
5. Other living room, family, or recreation room furniture including desks, wall units, and shelving?

| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 6. Living room furniture combinations? |  |
|  |  | 7. Dining room or kitchen furniture? |  |
|  |  | 8. Mattresses or box springs? |  |
|  |  | 9. Bedroom furniture other than mattresses or box springs? |  |
|  |  | 10. Infants furniture? |  |
|  |  | 11. Infants equipment? |  |
|  |  | 12. Patio, portch, or outdoor furniture? |  |
|  |  | 13. Barbeque grills or outdoor decorative items? |  |
|  |  | 14. Office furniture for home use? |  |
|  |  | 15. Lamps, lighting fixtures, or ceiling fans? |  |
|  |  | 16. Other household decorative items? |  |
|  |  | 17. Closet and storage items? |  |
|  |  | 18. Travel items including luggage? |  |
|  |  | 19. Stainless, silver, or other flatware? |  |
|  |  | 20. Non-electric cookware? |  |
|  |  | 21. Dishes, glasses, or serving pieces? |  |
|  |  | 22. Bedroom linens? |  |
|  |  | 23. Bathroom linens? |  |
|  |  | 24. Kitchen, dining room, or other linens? |  |
|  |  | 25. Slipcovers, decorative pillows, or cushions? |  |
|  |  | 26. Rugs or other non-permanent floor coverings, including carpet squares? |  |
|  |  | 27. Curtains or drapes? |  |
|  |  | 28. Blinds, shades, or other window coverings? |  |
|  |  | 95. Continue |  |
|  |  | 99. None/No more entries |  |
|  |  | 888. Delete the line |  |
| 08A | FURNDESC | What did you purchase? | Goto FURNMO |
|  |  | Item Month Amount |  |
|  |  | (FURNDESC)(FURNMO) (FURNPURX) |  |
| 08A | FURNMO | In what month did you purchase it? | Goto FURNGFTC |
|  |  | Item Month Amount (FURNDESC)(FURNMO) (FURNPURX) |  |
|  |  | 1. January |  |
|  |  | 2. February |  |
|  |  | 3. March |  |
|  |  | 4. April |  |
|  |  | 5. May 6. June |  |



| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 6. Living room furniture combinations |  |
|  |  | 7. Dinning room or kitchen furniture |  |
|  |  | 8. Mattresses or box springs |  |
|  |  | 9. Bedroom furniture other than mattresses or box springs |  |
|  |  | 10. Infants furniture |  |
|  |  | 11. Infants equipment |  |
|  |  | 12. Patio, porch, or outdoor furniture |  |
|  |  | 13. Barbeque grills or outdoor decorative items |  |
|  |  | 14. Office furniture for home use |  |
|  |  | 15. Lamps, lighting fixtures, or ceiling fans |  |
|  |  | 16. Other household decorative items |  |
|  |  | 17. Closet and storage items |  |
|  |  | 18. Travel items including luggage |  |
|  |  | 19. Stainless, silver or other flatware |  |
|  |  | 20. Non-electric cookware |  |
|  |  | 21. Dishes, glasses, or serving pieces |  |
|  |  | 22. Bedroom linens |  |
|  |  | 23. Bathroom linens |  |
|  |  | 24. Kitchen, dining room, or other linens |  |
|  |  | 25. Slipcovers, decorative pillows or cushions |  |
|  |  | 26. Rugs or other non-permanent floor coverings, including carpet squares |  |
|  |  | 27. Curtains or drapes |  |
|  |  | 28. Blinds, shades or other window coverings |  |
|  |  | 77. Misc. Combined (unable to specify/DK) |  |
| 08A | ANYOTH8 | Did you purchase any other (description)? | : Goto FRA_ITEM, next line of grid |
|  |  | Item Month Amount | 2,DK,RF: IF ROW number $=34$ then goto S8_END ELSE goto FRA_ITEM, next line of grid |
|  |  | (FURNDESC)(FURNMO) (FURNPURX) |  |
|  |  | 1. Yes |  |
|  |  | 2. No |  |
| 08B | FURNRNTL | Since the first of (reference month), have (youlyou or any members of your household) rented or leased any furniture? | 1: Goto FURNRNTX |
|  |  |  | 2,DK,RF: Goto REPFURN |
|  |  | 1. Yes |  |
|  |  | 2. No |  |
| 08B | FURNRNTX | What was the total expense? | Goto FRNRNTCX |
| 08B | FRNRNTCX | How much of the total amount was spent this month? | Goto REPFURN |
| 08B | REPFURN | Since the first of (reference month), have (youlyou or any members of your household) had any expenses for repairing, refinishing or reupholstering furniture, including the cost for fabric? | 1: Goto REPFURNX 2,DK,RF: Goto S8B_END |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 08B | REPFURNX | What was the total expense? | Goto REPFRNCX |
| 08B | REPFRNCX | How much of the total amount was spent this month? | Goto S8B_END |
| 09A | S9A_INTRO | [E] 26-27 | Goto CLA_ITEM |
|  |  | Now I am going to ask about clothing, footwear, and accessories, 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) <br> 1. Enter 1 to Continue |  |
| 09A | CLA_ITEM | SCREEN 1 $\qquad$ <br> [EH 26 ? [F1] | 1-20: Goto CLODESCA |
|  |  | Since the first of (reference month), have (youlyou or any members of your household) purchased any of the following items either for members of your household or for someone outside your household? <br> Read each item on list. | 95: Goto next row <br> 99: Goto S9A_END <br> 888: IF no more rows then goto S9A_END ELSE goto CLA_ITEM - next row of the table |
|  |  | SCREEN 2 <br> [EH 27 ? [F1] |  |
|  |  | Have (youlyou or any members of your household) purchased any -- <br> Read each item on list. |  |
|  |  | 1. Coats, jackets or furs <br> 2. Sport coats, tailored jackets, or blazers <br> 3. Suits <br> 4. Vests <br> 5. Shirts, sweaters, blouses, or tops <br> 6. Pants, jeans or shorts <br> 7. Dresses |  |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 8. Skirts |  |
|  |  | 9. Undergarments |  |
|  |  | 10. Hosiery |  |
|  |  | 11. Nightwear 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 footwear |  |
|  |  | 17. Diapers |  |
|  |  | 18. Layettes |  |
|  |  | 19. Watchers |  |
|  |  | 20. Jewelry |  |
|  |  | 95. Continue List |  |
|  |  | 99. None/No more entries |  |
|  |  | 888. Delete the line |  |
| 09A | CLODESCA | What did you buy? | Goto CLOINOUT |
|  |  | - Describe briefly the item purchased. |  |
|  |  | Description Name Month Amount |  |
|  |  | (CLODESCA) (CLONAME) (CLOTHMOA) (CLOTHXA) |  |
| 09A | CLOINOUT | Was this (were these) purchased for someone inside or outside of your household? | 1: IF CLA_ITEM = 1-18 then goto FORWHOM ELSE goto CLOTHMOA |
|  |  | 1. Inside your household | 2,3: IF CLA_ITEM = 1-18 then goto FOROUTCU |
|  |  | 2. Outside your household | ELSE goto CLOTHMOA |
|  |  | 3. Both inside and outside your household |  |
|  |  |  | DK,RF: Goto CLOTHMOA |
| 09A | FORWHOM | For whom was it purchased? | IF more than 1 person is selected then goto CLONAME |
|  |  | - Enter all that apply, separate with commas. | ELSE goto CLOTHMOA |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 9. ActiveCU[9] <br> 10. ActiveCU[10] <br> 11. ActiveCU[11] <br> 12. ActiveCU[12] <br> 13. ActiveCU[13] <br> 14. ActiveCU[14] <br> 15. ActiveCU[15] <br> 16. ActiveCU[16] <br> 17. ActiveCU[17] <br> 18. ActiveCU[18] <br> 19. ActiveCU[19] <br> 20. ActiveCU[20] <br> 21. ActiveCU[21] <br> 22. ActiveCU[22] <br> 23. ActiveCU[23] <br> 24. ActiveCU[24] <br> 25. ActiveCU[25] <br> 26. ActiveCU[26] <br> 27. ActiveCU[27] <br> 28. ActiveCU[28] <br> 29. ActiveCU[29] <br> 30. ActiveCU[30] <br> 77. Don't Know |  |
| 09A | FOROUTCU | For whom was this purchased? <br> - Enter all age/sex categories that apply to the purchase, separate with commas. <br> 40. Male 16 and over <br> 41. Female 16 and over <br> 42. Male 2-15 <br> 43. Female 2-15 <br> 44. Children under 2 years old <br> 77. Don't know | 40-44,77: Goto CLONAME <br> RF: Goto CLOTHMOA |
| 09A | CLONAME | - Enter name of person(s). | Goto CLOTHMOA |
| 09A | CLOTHMOA | When did you purchase it? <br> (* Enter 13 for same amount each month/ ) <br> Description Name Month Amount (CLODESCA) (CLONAME) (CLOTHMOA) (CLOTHXA) | Goto CLOTHXA |


| Section | CAPI 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 <br> 13. ^S09_13Option |  |
| 09A | CLOTHXA | (What is your monthly expense?/How much did it cost?) <br> Description Name Month Amount <br> (CLODESCA) (CLONAME) (CLOTHMOA) (CLOTHXA) | 1-999999: Goto CLOTHTXA <br> DK,RF: Goto CLOCMBA_S |
| 09A | CLOTHTXA | Did this include sales tax? <br> Description Name Month Amount (CLODESCA) (CLONAME) (CLOTHMOA) (CLOTHXA) <br> 1. Yes <br> 2. No | Goto CLOCMBA_S |
| 09A | CLOCMBA_S | - Enter 'C' for a combined expense. | C: Goto COMBCODE <br> EMPTY: IF INTNMBR = 4 AND (ITEM = 2 or 3 ) AND (INTPER = 201607, 201608, 201609, 201406, 201407 or 201409) then goto CLASTORE <br> ELSE goto MORE <br> IF anything other than a ' C ' or the enter key is entered, goto CK_C |
| 09A | CLOCMBA | [1] 26-27 ? [F1] <br> What other clothing is (Clothing purchase description) combined with? <br> Enter all that apply, separate with commas. | IF INTNMBR $=4$ AND (ITEM $=2$ or 3 ) AND (INTPER = 201607, 201608, 201609, 201406, 201407 or 201409) then goto CLASTORE <br> ELSE goto MORE |



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| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
| 09A | CLOMOREA | Did you purchase any other (description)? | 1: Goto CLA_ITEM, next row in the table |
|  |  | Description Name Month Amount (CLODESCA) (CLONAME) (CLOTHMOA) (CLOTHXA) | 2,DK,RF: IF row number $=84$ then goto S9A_END ELSE goto CLA_ITEM, next row in the table |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 09B | S9D_INTRO | [6] 28 | Goto CLD_ITEM |
|  |  | Now I am going to ask about expenditures for clothing services. |  |
|  |  | Description Month Amount (CLODESCD) (CLOTHMOD) (CLOTHXD) |  |
|  |  | 1. Enter 1 to Continue |  |
| 09B | CLD_ITEM | [12 28 ? [F1] | 1-5: Goto CLODESCD |
|  |  | Have (youlyou or any members of your household) had expenses for any of the following, either for members of your household or for someone outside your household? <br> Read each item on list. | 99: Goto S9D_END <br> 888: IF no more row then goto S9D_END ELSE goto CLD_ITEM - next row in the table |
|  |  | 1. Repair, alteration or tailoring for clothing and accessories <br> 2. Shoe repair or other shoe services <br> 3. Watch or jewelry repair <br> 4. Clothing or accessory rental <br> 5. Clothing storage outside the home <br> 99. None/No more entries <br> 888. Delete the line |  |
| 09B | CLODESCD | What kind of service was this? | Goto CLSVGFTC |
|  |  | Describe briefly the service. $\frac{\text { Description Month Amount }}{(\text { CLODESCD })(\text { CLOTHMOD })} \text { (CLSRVCX) }$ |  |
| 09B | CLSVGFTC | Was this service for (youlyour household) or for someone outside your household? | Goto CLOTHMOD |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | Description Month Amount (CLODESCD) (CLOTHMOD) (CLSRVCX) |  |
|  |  | 1. Your household <br> 2. Someone outside your household |  |
| 09B | CLOTHMOD | When did you purchase this service? | Goto CLSRVCX |
|  |  | $\frac{\text { Description Month Amount }}{\text { (CLODESCD) }} \text { (CLOTHMOD) (CLSRVCX) }$ |  |
|  |  | 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 |  |
| 09B | CLSRVCX | How much did it cost? | 1-999999: Goto CLSRVCTX |
|  |  | Description Month Amount (CLODESCD) (CLOTHMOD) (CLSRVCX) | DK,RF: Goto CLOCMBD_S |
| 09B | CLSRVCTX | Did this include sales tax? | Goto CLOCMBD_S |
|  |  | Description Month Amount (CLODESCD) (CLOTHMOD) (CLSRVCX) |  |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 09B | CLOCMBD_S | - Enter 'C' for a combined expense. | C: Goto CLOCMBD Empty: Goto CLOMORED |

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| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
| 09B | CLOCMBD | [12 28 ? [F1] | Goto CLOMORED |
|  |  | What other clothing services is (Clothing Service Description) combined with? <br> Enter all that apply, separate with commas. <br> Description Month Amount (CLODESCD) (CLOTHMOD) (CLSRVCX) |  |
|  |  | 1. Repair, alteration or tailoring for clothing and accessories <br> 2. Shoe repair or other shoe services <br> 3. Watch or jewelry repair <br> 4. Clothing or accessory rental <br> 5. Clothing storage outside the home <br> 77. Misc. combined (unable to specify/ DK) |  |
| 09B | CLOMORED | Did you have any other expenses for (Clothing Service Description)? <br> Description Month Amount <br> (CLODESCD) (CLOTHMOD) (CLSRVCX) | 1: Goto CLD_ITEM next row in the table <br> 2,DK,RF: IF ROW number = 10 then goto S9D_END ELSE goto CLD_ITEM next row in the table |
|  |  | 1. Yes 2. No |  |
| 10 | S10_INTRO | [1429 | Goto RLV_ITEM in BSect10L1 Block |
|  |  | Now I am going to ask about expenses for vehicle rentals and leases. <br> Vehicle number Vehicle year Vehicle make/model Business <br> (LSDNUM) <br> (MODELYR) <br> (MKMD_SCR) <br> (ANYBUSIN) |  |
|  |  | 1. Enter 1 to Continue |  |
| 10 | RLV_ITEM | SCREEN 1 $\qquad$ <br> 29 <br> ? [F1] | 1-10: Goto ANYVACAT |
|  |  | Since the first of (reference month), have (youlyou or any members of your household) rented any automobiles, trucks, vans, minivans, or SUVs, which were not used entirely for business? Do not include leased vehicles. | 95: Goto RLV_ITEM - next row <br> 99: IF no vehicles on inventory chart or all vehicles have 8500.LSD_STAT = 3 then exit block and goto LSD_ITEM <br> ELSE exit block and goto the Tbllnventory block |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | SCREEN 2 $\qquad$ <br> 29 ? [F1] <br> Since the first of (reference month), have (youlyou or any members of your household) rented any other types of vehicles which were not used entirely for business? <br> IF YES - <br> Did you rent any - <br> 1. Automobiles, trucks, vans, minivans, or SUVs <br> 2. Motor homes <br> 3. Trailer-type campers <br> 4. Other attachable-type campers <br> 5. Motorcycles, motor scooters, or mopeds (motorized bicycles) <br> 6. Boats, with motor <br> 7. Boats, without a motor <br> 8. Trailers other than a camper type, such as for a boat or cycle <br> 9. Private aircraft <br> 10. Other vehicles <br> 95. Continue list <br> 99. None/No More Entries <br> 888. Delete the Line | 888: IF no more table rows THEN if no vehicles on inventory chart or all vehicles have 8500.LSD_STAT $=3$ then exit block and goto LSD_ITEM else exit block and goto the TBLINVENTORY block <br> ELSE goto RLV_ITEM - next row of table |
| 10 | ANYVACAT | Was the (description) rented solely for use on a vacation, overnight trip, or a trip of 75 miles or more one way? <br> 1. Yes <br> 2. No | Goto RENTEXPX |
| 10 | RENTEXPX | Since the first of (reference month), not including (current month), what has been your expense for renting this vehicle? | IF BUSCREEN $=2$ then goto RENT_MORE ELSE goto ANYBSNRM |
| 10 | ANYBSNRM | Were or will any of the rental expenses be deducted as business expenses, reimbursed, or paid by someone outside of the household? <br> 1. Yes <br> 2. No | 1: Goto BSNSPCTZ 2,DK,RF: Goto RENT_MORE |
| 10 | BSNSPCTZ | What percent of the total expense will this cover? | 1-99,DK,RF: Goto RENT_MORE |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  |  | 100: Goto ERR2_BSNSPCTZ |
| 10 | RENT_MORE | Did you rent any other (description)? | 1: Goto RLV_ITEM |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ | 2,DK,RF: IF row number $=10$ then <br> IF no vehicles on inventory chart or all vehicles have 8500.LSD_STAT $=3$ then exit block and goto LSD_ITEM <br> ELSE exit block and goto TblInventory block ELSE goto RLV_ITEM |
| 10 | LVIHAVE | Now I am going to ask about leased vehicles you mentioned previously. | 1,DK,RF: Goto S10INV_END |
|  |  | Are you still leasing the (model year) (vehicle make and model)? <br> If the vehicle was purchased at the end of the lease, collect the new vehicle in Section 11. | 2: Goto LVIENDMO |
|  |  | Vehicle Number Vehicle Year Vehicle Make/Model Business      <br> $($ LSDNUM $) \quad$ (MODELYR) (MKMD_SCR) $\quad$ (ANYBUSIN)      |  |
|  |  | 1. Yes <br> 2. No |  |
| 10 | LVIENDMO | What month was the lease terminated? | Goto TERMFEE |
|  |  | Vehicle Number Vehicle Year Vehicle Make/Model Business <br> (LSDNUM) (MODELYR) (MKMD_SCR) (ANYBUSIN) |  |
|  |  | 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 | ? [F1] | 1: Goto TERMFEEX |



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| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
| 10 | NUMPAY | What was the number of payments contracted for? | 1-999: G goto PMTMONTH |
|  |  |  | DK,RF: Goto PMTMONTH |
| 10 | PMTMONTH | In what month was or will the first payment be made? | Goto PMTYEAR |
|  |  | 1. January |  |
|  |  | 2. February |  |
|  |  | 3. March |  |
|  |  | 4. April |  |
|  |  | 5. May |  |
|  |  | 6. June |  |
|  |  | 7. July |  |
|  |  | 8. August |  |
|  |  | 9. September |  |
|  |  | 10. October |  |
|  |  | 11. November |  |
|  |  | 12. December |  |
| 10 | PMTYEAR | In what year was or will the first payment be made? | Goto PAYEXPX |
| 10 | PAYEXPX | (What is your monthly payment amount?/What is the amount of each payment?) | IF NUMPAY It 12 then goto PAYTIME |
|  |  |  | ELSE goto ANYEXTRA |
| 10 | PAYTIME | What period is covered by each payment? | 1: goto ANYEXTRA |
|  |  |  | 2: goto ANYEXTRA |
|  |  | 1. Week |  |
|  |  | 2. 2 Weeks | 3: goto ANYEXTRA |
|  |  | 3. Month |  |
|  |  | 4. Quarter | 4: goto ANYEXTRA |
|  |  | 5. Semiannually |  |
|  |  | 6. Annually | 5: goto ANYEXTRA |
|  |  | 7. One time payment |  |
|  |  | 8. Other | 6: goto ANYEXTRA |
|  |  |  | 7: ANYEXTRA |
|  |  |  | 8: goto PAYOTH |
|  |  |  | DK,RF: goto ANYEXTRA |
| 10 | PAYOTH | - Specify: | Goto ANYEXTRA |
| 10 | ANYEXTRA | Does the payment include any charges other than the lease amount such as auto insurance or maintenance? | 1: Goto EXTRAEXP |

Section CAPI Variable Name Question Text Skip Instructions

|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| :---: | :---: | :---: | :---: |
| 10 | EXTRAEXP | How much of the payment is for these extra charges? | Goto ANYEMPLY |
| 10 | ANYEMPLY | Is any of the (\$ (amount in PAYEXPX) ) lease payment paid by an employer? | 1: Goto EMPLYEXP |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ | 2,DK,RF: Goto ANYTRADE |
| 10 | EMPLYEXP | How much? | Goto ANYTRADE |
| 10 | ANYTRADE | Was a trade-in allowance received? | 1: Goto TRADEEXP |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ | 2,DK,RF: Goto ANYDOWN |
| 10 | TRADEEXP | How much? | Goto ANYDOWN |
| 10 | ANYDOWN | Was a cash down payment made? | 1: Goto DOWNEXP |
|  |  | - Read if necessary - | 2,DK,RF: Goto ANYHAVE |
|  |  | Your lease agreement may list this as a capitalized cost reduction. |  |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 10 | DOWNEXP | How much? | Goto ANYDNEMP |
| 10 | ANYDNEMP | Was any portion of the cash down payment paid by an employer? | 1: Goto DNEMPEXP |
|  |  |  | 2,DK,RF: Goto ANYHAVE |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 10 | DNEMPEXP | How much? | Goto ANYHAVE |
| 10 | ANYHAVE | Are you still leasing this vehicle? | 1,DK,RF: Goto ANYOTH |
|  |  | - If the vehicle was purchased at the end of the lease, collect the new vehicle in Section 11. | 2: Goto LSDENDMO |
|  |  | 1. Yes <br> 2. No |  |
| 10 | LSDENDMO | In what month was the lease terminated? | Goto LSDENDYR |
|  |  | 1. January |  |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 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 | In what year was the lease terminated? | Goto ANYFEES |
| 10 | ANYFEES | ? [F1] | 1: Goto FEESEXP |
|  |  | Were any fees incurred at the termination of the lease? | 2,DK,RF: Goto ANYOTH |
|  |  | 1. Yes 2. No |  |
| 10 | FEESEXP | How much? | Goto ANYOTH |
| 10 | ANYOTH | Did you lease any other automobiles, trucks, vans, minivans, or SUVs? | 1: IF ROW number $=6$ then goto ERR_MAX ELSE goto LSD_ITEM, next row |
|  |  | 1. Yes <br> 2. No | 2,DK,RF: Exit block and goto S10_END |
| 11 | S11_INTRO | $29$ | IF there are vehicles on the chart with 8500.OVB_STAT ne 3 then goto OVAHAVE |
|  |  | Now I'm going to ask about owned vehicles. ^S11_prechart | ELSE goto OVB_ITEM |
|  |  | 1. Enter 1 to Continue |  |
| 11 | OVAHAVE | (Do/Does) (youlyour household) still have the (Car Description)? ^S11_prechart | 1,DK,RF: Goto OVAHAVE for next appropriate vehicle on chart, if no more vehicles exit block and goto OVB_ITEM |
|  |  | 1. Yes <br> 2. No | 2: Goto VEHDISP |
| 11 | VEHDISP | How did you dispose of the (Car description)? | 1-5,DK,RF: Goto VDISPMO |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 1. Sold <br> 2. Traded in <br> 3. Given away or donated to someone outside the household, including students away at school <br> 4. Totaled (damaged beyond repair) <br> 5. Stolen <br> 6. Other | 6: Goto DISPOTHV |
| 11 | DISPOTHV | - Specify: | Goto VDISPMO |
| 11 | 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 <br> 6. June <br> 7. July <br> 8. August <br> 9. September <br> 10. October <br> 11. November <br> 12. December | IF VEHDISP = 1 then goto SALEX <br> ELSEIF VEHDISP $=2,3,6$, DK or RF then goto <br> LOANSTAT <br> ELSEIF VEHDISP $=4$ or 5 then goto REIMBURS |
| 11 | SALEX | How much did you sell it for? | Goto LOANSTAT |
| 11 | REIMBURS | Were you reimbursed for the value of the (Car description)? <br> 1. Yes <br> 2. No | 1: Goto REIMBURX <br> 2,DK,RF: Goto EXREIMB |
| 11 | REIMBURX | How much did you receive? | Goto LOANSTAT |
| 11 | EXREIMB | Do you expect to be reimbursed for the value of the (Car description)? 1. Yes 2. No | $\begin{aligned} & \text { 1: } \quad \text { Goto EXREIMBX } \\ & \text { 2,DK,RF: Goto LOANSTAT } \end{aligned}$ |
| 11 | EXREIMBX | How much will you receive? | Goto LOANSTAT |
| 11 | 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 |


(Do/Does) (youlyour household) own any automobiles, trucks, minivans, vans or SUV's which were not used entirely for business?

## SCREEN 2 <br> $\qquad$

(Do/Does) (youlyour household) own any other types of vehicles including boats and planes which are not used entirely for business?

- IF YES- Read each item on list

Do you own any. . .

SCREEN 3

| Section | CAPI Variable Name | Question Text |
| :--- | :--- | :--- |
|  | (Have/Has) (you/your household) purchased any (otherl) vehicles since the first |  | of (reference month) for someone outside of your household?

- IF YES -

What kind of vehicle(s) did you purchase?

SCREEN 4
(Have/Has) (youlyour household) disposed of (anylany automobiles or) other vehicles since the first of (reference month)?

- IF YES -

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

1. ^AutoOrTruck
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 aircraft
10. Any other vehicle
11. Continue list
12. None/No more entries
13. Delete the line


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| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  |  | X: Goto OTHMDLY |
| 11 | OTHMDLY | - Specify: | Goto AUTOTRK |
| 11 | AUTOTRK | Is this vehicle an automobile or a truck, minivan, van or SUV? | Goto FUELTYPE |
|  |  | 1. Automobile <br> 2. Truck, van, minivan, or SUV |  |
| 11 | FUELTYPE | Is it fueled by - <br> - Read each item on list. | 1-3,DK,RF: IF BUSCREEN = 2 goto VEHNEWU ELSE goto VEHBSNS <br> 4: Goto FUELOTH |
|  |  | 1. Gasoline? <br> 2. Diesel fuel? <br> 3. Hybrid electric power? <br> 4. Other - specify? |  |
| 11 | FUELOTH | - Specify: | IF BUSCREEN = 2 goto VEHNEWU ELSE goto VEHBSNS |
| 11 | VEHBSNS | (Was/ls) it used for business? | 1: Goto VEHBSNZ |
|  |  |  | 2,DK,RF: Goto VEHNEWU |
|  |  | 1. Yes <br> 2. No |  |
| 11 | VEHBSNZ | What percentage of the mileage (was/is) counted as a business expense? | 1-99,DK,RF: Goto VEHNEWU |
|  |  |  | 100: Goto ERR2_VEHBSNZ |
| 11 | VEHNEWU | Was it new or used when acquired? | 1: IF coming from OVB_ITEM screen 1A, 1B, 2, or 4 then goto VEHGFTC <br> ELSE goto VEHPURMO |
|  |  | 1. New <br> 2. Used | 2,DK,RF: IF coming from OVB_ITEM screen 1A, 1B, 2, or 4 then goto VEHGFTC <br> ELSE goto VPURINDV |
| 11 | VEHGFTC | Was this vehicle - | 1,2,DK,RF: IF VEHNEWU = 1 then goto VEHPURMO ELSE goto VPURINDV |
|  |  | 1. Purchase for own use? <br> 2. Purchased for someone outside of your household? <br> 3. Received as a gift? | 3: IF DISPOSED = 1 then goto VEHDISP ELSE goto ANYOTHR |
| 11 | VPURINDV | Was this vehicle purchased from a private individual? | IF ITEM $=1-2$ or 5 AND VEHGFTC $=3$ AND DISPOSED ne 1 then goto ANYOTHR |

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| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  |  | DK,RF: Goto NETPURX |
| 11 | NETPURX | What was the amount paid for the vehicle after (trade-in allowance, I ) rebate, and discount? | 0-999999: Goto SALESTAX |
|  |  | - Include destination fee in the price. | DK,RF: IF VLOANST = 1 then goto DNPAYMTX ELSE goto ANYOTHR |
| 11 | SALESTAX | Did this include sales tax? | IF VLOANST = 1 then goto DNPAYMTX ELSE goto ANYOTHR |
|  |  | 1. Yes <br> 2. No |  |
| 11 | DNPAYMTX | What was the amount of the cash down payment? | 0-999999: Goto VEHEQTLN |
|  |  |  | DK,RF: Goto VEHEQTLN |
| 11 | VEHEQTLN | Was the source of credit a Home Equity Loan? | Goto PRINCIPX |
|  |  | 1. Yes <br> 2. No |  |
| 11 | PRINCIPX | How much was borrowed, excluding any interest? | Goto VINTRATE |
| 11 | VINTRATE | What was the interest rate? | Goto PMT1YR |
|  |  | - Enter percent including decimal. |  |
| 11 | PMT1YR | In what year was or will the first payment be made? | Goto PMT1MO |
| 11 | PMT1MO | In what month was or will the first payment be made? | Goto VEHQPMT |
|  |  | 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 | VEHQPMT | For how many months was the payment contract? | Goto PAYMENTX |
| 11 | PAYMENTX | What is your monthly payment amount? | IF DISPOSED $=1$ then goto VEHDISP |
|  |  |  | ELSE goto ANYOTHR |
| 11 | VEHDISP | How did you dispose of the (Car description)? | 1-5,DK,RF: Goto VDISPMO |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 1. Sold <br> 2. Traded in <br> 3. Given away or donated to someone outside the household, including students away at school <br> 4. Totaled (damaged beyond repair) <br> 5. Stolen <br> 6. Other | 6: Goto DISPOTHV |
| 11 | DISPOTHV | - Specify: | Goto VDISPMO |
| 11 | 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 | $\begin{aligned} & \text { IF VEHDISP }=1 \text { then goto SALEX } \\ & \text { ELSEIF VEHDISP }=2,3,6 \text {, DK or RF then goto } \\ & \text { LOANSTAT } \\ & \text { ELSEIF VEHDISP }=4 \text { or } 5 \text { then goto REIMBURS } \end{aligned}$ |
| 11 | SALEX | How much did you sell it for? | Goto LOANSTAT |
| 11 | REIMBURS | Were you reimbursed for the value of the (Car description)? | 1: Goto REIMBURX |
|  |  | 1. Yes <br> 2. No | 2,DK,RF: Goto EXREIMB |
| 11 | REIMBURX | How much did you receive? | Goto LOANSTAT |
| 11 | EXREIMB | Do you expect to be reimbursed for the value of the (Car description)? <br> 1. Yes <br> 2. No | 1: Goto EXREIMBX <br> 2,DK,RF: Goto LOANSTAT |
| 11 | EXREIMBX | How much will you receive? | Goto LOANSTAT |
| 11 | 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,DK,RF: Goto ANYOTHR |

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| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 11. Other vehicle services, parts, or equipment <br> 12. Vehicle cleaning services including car washes <br> 99. None/No more entries <br> 888. Delete a line |  |
| 12A | VOPDESC | What was the expense for? | IF ITEM $=3,4$, or 5 then goto VOPMOA ELSE goto VOPLABOR |
| 12A | VOPLABOR | Did this expense include labor? <br> 1. Yes <br> 2. No | Goto VOPMOA |
| 12A | VOPMOA | 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 | Goto VOPEXPX |
| 12A | VOPEXPX | What was the total cost? | $\begin{aligned} & \text { 1-99999: Goto VOPTAX } \\ & \text { DK,RF: Goto VOPCMB_C } \end{aligned}$ |
| 12A | VOPTAX | Did this include sales tax? | Goto VOPCMB_C |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 12A | VOPCMB_C | - Enter 'C' for combined expense | C: Goto VOPCMB |
|  |  |  | EMPTY: Goto VOPREIMB |
| 12A | VOPCMB | [EA 30 ? [F1] | 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 change, lubrication, or oil filter <br> 2. Motor tune-up |  |
|  |  | 3. Battery purchases or installation |  |
|  |  | 4. Tire purchases or mounting |  |
|  |  | 5. Tire repair |  |
|  |  | 6. Front end alignment, wheel balancing, or wheel rotation |  |
|  |  | 7. Shock absorber replacement |  |
|  |  | 8. Body work or painting |  |
|  |  | 9. Any other vehicle or engine repairs |  |
|  |  | 10. Vehicle accessories or customizing |  |
|  |  | 11. Other vehicle services, parts, or equipment |  |
|  |  | 12. Vehicle cleaning services including car washes |  |
|  |  |  |  |
| 12A | VOPREIMB | Has any of this expense been, or will any of it be, reimbursed? | 1: Goto VOPRMBXA |
|  |  | Description Month Amount | 2,DK,RF: Goto MOREVEOP |
|  |  | (VOPDESC) (VOPMOA) (VOPEXPX) |  |
|  |  | 1. Yes |  |
|  |  | 2. No |  |
| 12A | VOPRMBXA | How much? | Goto MOREVEOP |
|  |  | Description Month Amount (VOPDESC) (VOPMOA) (VOPEXPX) |  |

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| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
| Description Month Amount(VREGDESC) (VOPMO_C) (VOPREGX) |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  | 1. January2. February |  |
|  |  | 3. March |  |
|  |  | 4. April |  |
|  |  | 5. May |  |
|  |  | 6. June |  |
|  |  | 7. July |  |
|  |  | 8. August |  |
|  |  | 9. September |  |
|  |  | 10. October |  |
|  |  | 11. November |  |
|  |  | 12. December |  |
| 12B | VOPREGX | What was the total amount of the expense? | Goto S12BCMB_C |
|  |  |  |  |
|  |  | $\frac{\text { Description Month Amount }}{\text { (VREGDESC) (VOPMO_C) (VOPREGX) }}$ |  |
| 12B | S12BCMB_C | * Enter 'C' for combined expense | C: Goto S12B_CMB |
|  |  |  | EMPTY: Goto MOREREG |
| 12B | S12B_CMB | [13 31 ? [F1] | Goto MOREREG |
|  |  | What was combined with the (Description) expense? |  |
|  |  | - Enter all that apply, separate with commas |  |
|  |  | Description Month Amount |  |
|  |  | (VREGDESC) (VOPMO_C) (VOPREGX) |  |
|  |  | 1. Driver's license |  |
|  |  | 2. Vehicle inspection |  |
|  |  | 3. State Vehicle registration |  |
|  |  | 4. Local Vehicle registration |  |
|  |  | 5. Personal property taxes for vehicles |  |
| 12B | MOREREG | Did you have any other (Description) expenses? | 1: Goto VLR_ITEM, next row or the table |
|  |  | Description Month Amount | 2,DK,RF: IF ROW number $=11$ then goto S12B_END |
|  |  | (VREGDESC) (VOPMO_C) (VOPREGX) | ELSE goto VLR_ITEM, next row of the table |

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| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 12C | VOPGASX | ? [F1] | 0,RF: Goto VOPOIL |
|  |  | Since the first of (reference month) not including this month -- | 1-9999: Goto VOPDIES |
|  |  | What has been (yourlyour household's) AVERAGE MONTHLY expense for gasoline and other fuels for all vehicles? | DK: Goto VOPDIES |
| 12C | VOPDIES | ? [F1] | 1: Goto VOPDIESX |
|  |  | Was any of this expense for diesel fuel? | 2,DK,RF: IF BCeintro.BUSCREEN $=2$ AND INTNMBR $=4$ AND (INTPER = 201607, 201608, 201609, 201406, 201407 or 201409) then goto GASLOC |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ | ELSEIF BCeintro.BUSCREEN = 2 goto VOPOIL ELSE goto VOPBSNS |
| 12C | VOPDIESX | How much? | 1-9999: IF (VOPDIESX It 5 or gt 400) then goto ERR1_VOPDIESX <br> ELSEIF (VOPDIESX gt VOPGASX) then goto CK_VOPDIESX <br> ELSEIF BCeintro.BUSCREEN = 2 AND <br> INTNMBR $=4$ AND ((INTPER = 201607, 201608, 201609, 201406, 201407 or 201409) then goto <br> GASLOC <br> ELSEIF BCeintro.BUSCREEN $=2$ then goto VOPOIL <br> ELSE goto VOPBSNS <br> DK,RF: IF BCeintro.BUSCREEN $=2$ AND INTNMBR = <br> 4 AND (INTPER = 201607, 201608, 201609, 201406, <br> 201407 or 201409) then goto GASLOC <br> ELSEIF BCeintro.BUSCREEN = 2 then goto VOPOIL <br> ELSE goto VOPBSNS |
| 12C | VOPBSNS | Was any of the AVERAGE MONTHLY cost counted as a business expense? | 1: Goto VOPBSPER |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ | 2,DK,RF: IF INTNMBR = 4 AND (INTPER = 201607, 201608, 201609, 201406, 201407 or 201409) then goto GASLOC <br> ELSE goto VOPOIL |
| 12C | VOPBSPER | What percentage of the AVERAGE MONTHLY COST was counted as a business expense? | 1-99,DK,RF: IF INTNMBR = 4 AND (INTPER = 201607, |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  |  | 201608, 201609, 201406, 201407 or 201409) then goto GASLOC <br> ELSE goto VOPOIL |
|  |  |  | 100: Goto ERR2_VOPBSPER |
| 12C | GASLOC | From (reference month) through (last month), where did (youlyour household) (last/most frequently) purchase gas? | Goto VOPOIL |
|  |  | - Enter city and state |  |
| 12C | VOPOIL | ? [F1] | 1: Goto VOPOILX |
|  |  | Since the first of (reference month) not including this month -- | 2,DK,RF: Goto VOPFLUID |
|  |  | Have (youlyou or any members of your household) purchased any oil for operating vehicles? |  |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 12C | VOPOILX | ? [F1] | Goto VOPFLUID |
|  |  | What was the total cost? |  |
| 12C | VOPFLUID | ? [F1] | 1: Goto VOPFLUDX |
|  |  | Since the first of (reference month), not including this month -- | 2,DK,RF: Goto VOPPARK |
|  |  | Have (youlyou or any members of your household) purchased any antifreeze, brake fluid, transmission fluid, windshield wiper fluid, or additives, except if purchased with a tune-up? |  |
|  |  | 1. Yes <br> 2. No |  |
| 12C | VOPFLUDX | What was the total cost of these purchases? | Goto VOPPARK |
| 12C | VOPPARK | ? [F1] | 1: Goto VOPPARKX |
|  |  | Since the first of (reference month) not including this month -- | 2,DK,RF: Goto VOPTOLL |
|  |  | Have (youlyou or any members of your household) had expenses for parking, such as parking garages, parking lot fees, or parking meters? |  |

Section CAPI Variable Name Question Text

Do not include expenses that are part of your property ownership or
rental costs, a business expense or expenses that will be totally reimbursed.

|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| :---: | :---: | :---: | :---: |
| 12C | VOPPARKX | How much was paid, not including any payments made this month? | Goto VOPTOLL |
| 12C | VOPTOLL | ? [F1] | 1: Goto VOPTOLLX |
|  |  | Since the first of (reference month) not including this month, have (you/you or any members of your household) had expenses for - | 2,DK,RF: Goto VOPDOCK |
|  |  | Local tolls or electronic toll passes? |  |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 12C | VOPTOLLX | How much was paid, not including any payments made this month? | Goto VOPDOCK |
| 12C | VOPDOCK | ? [F1] | 1: Goto VOPDOCKX |
|  |  | Since the first of (reference month) not including this month, have (you/you or any members of your household) had expenses for - | 2,DK,RF: Goto VOPPOLCY |
|  |  | Docking and landing fees for boats and planes? |  |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 12C | VOPDOCKX | How much was paid, not including any payments made this month? | Goto VOPPOLCY |
| 12C | VOPPOLCY | ? [F1] | 1: Goto VOPPLCYX |
|  |  | Since the first of (reference month) not including this month, have (you/you or any members of your household) had any expenses for -- | 2,DK,RF: Goto VOPAUTO |

your household) had any expenses for --

## Auto repair service policies such as extended warranties?

Do not include service policies for vehicles used entirely for business.

1. Yes
12C VOPPLCYX How much?

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| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
| 12C | VOPAUTO | ? [F1] | 1: Goto VOPCLUBX |
|  |  | Since the first of (reference month) not including this month, have (you/you or any members of your household) had any expenses for -- | 2,DK,RF: Goto VOPTOW |
|  |  | Automobile service clubs, such as AAA or services such as OnStar or LoJack? |  |
|  |  | 1. Yes <br> 2. No |  |
| 12C | VOPCLUBX | How much? | Goto VOPTOW |
| 12C | VOPTOW | ? [F1] | 1: Goto VOPTOWX |
|  |  | Since the first of (reference month) not including this month, have (you/you or any members of your household) <br> had expenses for - | 2,DK,RF: Goto TANKGAS |
|  |  | Towing charges, not already reported? |  |
|  |  | 1. Yes <br> 2. No |  |
| 12C | VOPTOWX | How much was paid, not including any payments made this month? | Goto TANKGAS |
| 12C | TANKGAS | ? [F1] | 1: Goto TANKGASX |
|  |  | Since the first of (reference month) not including this month, have (you/you or any members of your household) had any expenses for -- | 2,DK,RF: Goto S12C_END |
|  |  | Bottled or tank gas for recreational vehicles, including vans, campers, and boats? |  |
|  |  | 1. Yes <br> 2. No |  |
| 12C | TANKGASX | How much? | Goto S12C_END |
| 13A | S13A1_INTRO | [4 32 | IF there are any active Policies listed on the inventory chart (8500.PLCYSTAB ne 1) then goto BSect13A Block |
|  |  | Now I am going to ask about your non-health insurance policies. (Include policies paid by your household for someone outside your household.I ) | ELSE goto S13A_END |

Policy|Insurance | |Insurance|Paid|Payroll |Payment|Paid |Paid

| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | Number\|Description|Type| Company | By |Deduction|Period |Total|Month |  |
|  |  | 1. Enter 1 to Continue |  |
| 13A | PLCYSTIL | Do (youlyou or any members of your household) still have or make payments for the (long term carellife or disabilitylauto/homeowner's/tenants'lother type of non-health) insurance policy from (Insurance Company)? | IF 8500.PREMYOU = 2 then goto S13A_END ELSE goto INSEX3A |
|  |  | Policy\|Insurance | |Insurance|Paid|Payroll |Paid |Paid Number|Description|Type| Company | By |Deduction|Total|Month |  |
|  |  | 1. Yes <br> 2. No |  |
| 13A | INSEX3A | Since the first of (reference month) have you had any expenses for this policy? | 1: Goto INSEX3AX |
|  |  | Policy\|Insurance | |Insurance|Paid|Payroll |Paid |Paid Number|Description|Type| Company | By |Deduction|Total||Month | 2,DK,RF: Goto S13A_END |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 13A | INSEX3AX | How much was paid? | 1-99999: Goto INSEXXA |
|  |  | Policy\|Insurance | |Insurance|Paid|Payroll |Paid |Paid Number|Description|Type| Company | By |Deduction|Total|Month | DK,RF: Goto S13A_END |
| 13A | INSEXXA | How much was paid this month? | Goto S13A_END |
|  |  | Policy\|Insurance | |Insurance|Paid|Payroll |Paid |Paid Number|Description|Type| Company | By |Deduction|Total|Month |  |
| 13B | INB_ITEM | [E] 32 ? [F1] | 1-6: Goto INSCOMP |
|  |  | (Do ^YOU_ANYMEM have any or pay for any -/Since the first of ^REF_MONTH have ^YOU_ANYMEM purchased o | 99: Goto S13B_END |
|  |  | - Read each item on list | 888: IF no more rows in the table then goto S13B_END ELSE goto INB ITEM - next row of the table |

[^3]4. Renters' insurance?

| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 5. Automobile or other vehicle insurance? |  |
|  |  | 6. Other types of non-health insurance? |  |
|  |  | 99. None/No more entries |  |
|  |  | 888. Delete a line |  |
| 13B | INSCOMP | What is the name of the insurance company for your (long term carellife or disability/homeowners'/tenants'/vehicle/other type of insurance) policy? | Goto INSDESC |
|  |  | - Enter name of insurance company, not the insurance agent. |  |
| 13B | INSDESC | Briefly describe the policy. | IF ITEM = 3 then goto INSPROP ELSE goto PREMYOU |
| 13B | INSPROP | Which property (ies) does this policy cover? | Goto PREMYOU |
|  |  | - Enter number of each property covered, separate with commas. |  |
|  |  | 1. PROPDESC[1] |  |
|  |  | 2. PROPDESC[2] |  |
|  |  | 3. PROPDESC[3] |  |
|  |  | 4. PROPDESC[4] |  |
|  |  | 5. PROPDESC[5] |  |
|  |  | 6. PROPDESC[6] |  |
|  |  | 7. PROPDESC[7] |  |
|  |  | 8. PROPDESC[8] |  |
|  |  | 9. PROPDESC[9] |  |
|  |  | 10. PROPDESC[10] |  |
|  |  | 11. PROPDESC[11] |  |
|  |  | 12. PROPDESC[12] |  |
|  |  | 13. PROPDESC[13 |  |
|  |  | 14. PROPDESC[14] |  |
|  |  | 15. PROPDESC[15] |  |
|  |  | 16. PROPDESC[16] |  |
|  |  | 17. PROPDESC[17] |  |
|  |  | 18. PROPDESC[18] |  |
|  |  | 19. PROPDESC[19] |  |
|  |  | 20. PROPDESC[20] |  |
|  |  | 99. Property not owned or rented by the household |  |
| 13B | PREMYOU | (DolDoes) (youlyour household) pay ANY portion of the premiums for this policy? | 1, DK, RF: Goto PAYDEDPR |
|  |  | 1. Yes | 2: Goto PREMOUT |
|  |  | 2. No |  |
| 13B | PREMOUT | Who pays the policy premiums? | Goto S13_S |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 1. An employer or union? <br> 2. Another group or persons outside your household? |  |
| 13B | PAYDEDPR | Are any premiums paid through payroll deductions? | Goto INSEXPBX |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 13B | INSEXPBX | Since the first of (reference month), what was (yourlyour household's) total expense for this insurance policy? | 1-99999: Goto INSNEXXB |
|  |  | Enter the actual amount the household paid. Do not include any expenses paid for the household by others. | 0,DK,RF: Goto S13_S |
| 13B | INSNEXXB | How much was paid this month? | Goto S13_S |
| 13B | S13_S | * Enter "C" for a combined expense | C: Goto S13CMB |
|  |  |  | EMPTY: Goto INSMORE |
| 13B | S13CMB | [13 32 ? [F1] | IF 3 is selected then goto COMBPROP ELSE goto INSMORE |
|  |  | What other type of policy is the (Insurance type) combined with? |  |
|  |  | - 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 <br> 3. Homeowners' insurance |  |
|  |  | 4. Renters' insurance |  |
|  |  | 5. Automobile or other vehicle insurance |  |
|  |  | 6. Other types of non-health insurance <br> 77. Misc. combined (unable to specify/DK) |  |
| 13B | S13CMBPROP | Which property (ies) did this policy cover? | Goto INSMORE |

[^4]4. PROPDESC[4]
5. PROPDESC[5]

| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 6. PROPDESC[6] |  |
|  |  | 7. PROPDESC[7] |  |
|  |  | 8. PROPDESC[8] |  |
|  |  | 9. PROPDESC[9] |  |
|  |  | 10. PROPDESC[10] |  |
|  |  | 11. PROPDESC[11] |  |
|  |  | 12. PROPDESC[12] |  |
|  |  | 13. PROPDESC[13 |  |
|  |  | 14. PROPDESC[14] |  |
|  |  | 15. PROPDESC[15] |  |
|  |  | 16. PROPDESC[16] |  |
|  |  | 17. PROPDESC[17] |  |
|  |  | 18. PROPDESC[18] |  |
|  |  | 19. PROPDESC[19] |  |
|  |  | 20. PROPDESC[20] |  |
|  |  | 99. Property not owned or rented by the household |  |
| 13B | INSMORE | (Do ^You_Anymem have any or make payments for any other ^inbdescription policy?/Did ^you_Anymem purchase or begin paying for any other ^inbdescritpion | 1: ELSE goto INB_ITEM, next row of the table |
|  |  |  | 2,DK,RF: IF Row number = 100 then goto S13B_END ELSE goto INB_ITEM, next row of the table |
|  |  | 1. Yes |  |
|  |  | 2. No |  |
| 14A | S14A_INTRO | L6 33 | IF there are any records on the SCIF with 8500.IHB_STAT = 1 then goto BSect14ARow block |
|  |  | Now I am going to ask about health Insurance. | ELSE goto S14A_END |
|  |  | Policy\|Insurance | |Insurance|Payroll |Time | |Paid |Paid \# |Description|Type| Company |Deduction|Period|Payment|Total|Non-CU |  |
|  |  | 1. Enter 1 to Continue |  |
| 14A | HHISTILL | (Do/Does) (you/your household) still have your (HMO/fee for service/commercial Medicare supplement Ispecial purpose) policy from (insurance company name)? | IF 8500.HHIPRYOU = 2 then goto S14A_END ELSE goto HHIANYPD |
|  |  | Policy\|Insurance | $\quad$ Insurance\|Payroll |Time | $\begin{array}{c}\mid \text { Paid \|Paid } \\ \text { \# \|Description\|Type\| Company \|Deduction\|Period\|Payment\|Total\|Non-CU }\end{array}$ |  |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 14A | HHIANYPD | Since the first of (reference month), have (youlyou or any members of your household) | 1: IF 8500.HHIRPMPD $=1-9$ then goto HHILSTTM |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | made any payments on this policy (including payroll deductions/ )? | ELSE goto HHIRPMPA |
|  |  | $\begin{aligned} & \text { Policy\|Insurance \| \|Insurance\|Payroll \|Time \| \|Paid \|Paid } \\ & \# \text { \|Description\|Type\| Company \|Deduction\|Period\|Payment\|Total\|Non-CU } \end{aligned}$ | 2,DK,RF: Goto S14A_END |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 14A | HHILSTTM | Last time, I recorded that payments are made (periodicity). Is this still correct? | 1: Goto HHIREGXA |
|  |  | $\begin{aligned} & \text { Policy\|Insurance \| \|Insurance\|Payroll \|Time \| \|Paid \|Paid } \\ & \# \text { \|Description\|Type\| Company \|Deduction\|Period\|Payment\|Total\|Non-CU } \end{aligned}$ | 2, DK, RF: Goto HHIRPMPA |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 14A | HHIRPMPA | How often are payments made (including payroll deductions/ )? | 1-9: Goto HHIREGXA |
|  |  | Policy\|Insurance | |Insurance|Payroll |Time | $\quad \mid$ Paid \|Paid <br> $\# \quad \mid$ Description\|Type| Company |Deduction|Period|Payment|Total|Non-CU | 10, DK, RF: Goto HHIPDAMT |
|  |  | 1. Once a week |  |
|  |  | 2. Once every 2 weeks |  |
|  |  | 3. Twice a month |  |
|  |  | 4. Once a month |  |
|  |  | 5. Every 2 months |  |
|  |  | 6. Quarterly (every 3 months) |  |
|  |  | 7. Once every 4 months |  |
|  |  | 8. Twice a year (every 6 months) |  |
|  |  | 9. Once a year |  |
| 14A | HHIREGXA | What is the amount currently paid (periodicity)? | Goto S14A_END |
|  |  | Policy\|Insurance | |Insurance|Payroll |Time | |Paid |Paid <br> \# \|Description|Type| Company |Deduction|Period|Payment|Total||Non-CU |  |
| 14A | HHIPDAMT | How much was paid since the first of (reference month)? | 1-99999: Goto HHICMXXA |
|  |  | Policy\|Insurance | |Insurance|Payroll |Time | |Paid |Paid <br> \# \|Description|Type| Company |Deduction|Period|Payment|Total||Non-CU | DK,RF: Goto S14A_END |

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| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
| 14A | HHICMXXA | How much of that (\$(amount from HHIPDAMT) / ) was paid this month? | Goto S14A_END |
|  |  | Policy\|Insurance | |Insurance|Payroll |Time | |Paid |Paid <br> \# \|Description|Type| Company |Deduction|Period|Payment|Total|Non-CU |  |
| 14B | IHB_ITEM | [E] 33 ? [F1] | 1: Goto HINSCMP |
|  |  | ^IHBITEM | 99: Goto S14B_END |
|  |  | Do not report Medicare Prescription Drug plans (Medicare Part D) here. Medicare Prescription Drug plans are collected in Section 14C. | 888: IF no more grid lines then goto S14B_END ELSE goto IHB_ITEM - next line of grid |
|  |  | 1. Hospitalization or health insurance plans 99. None/No More Entries 888. Delete the Line |  |
| 14B | HINSCMP | What is the name of the insurance company for this policy? | Goto HHIBCBS |
|  |  | - Enter name of insurance company, not the insurance agent |  |
| 14B | HHIBCBS | Do not read to respondent. <br> Is the insurance company Blue Cross/Blue Shield? | 1: Goto HHICOVQ |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 14B | TRICARE | - Do not read to respondent. | Goto HHICOVQ |
|  |  | Is the insurance company Tricare? |  |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 14B | HHICOVQ | How many household members are/were covered by this policy? | IF TRICARE = 1 goto HHIGROUP ELSE goto HHICODE |
| 14B | HHICODE | [1733 ? [F1] | 1: Goto HHIPOS |
|  |  | What type of insurance plan is it? | 2-3,DK,RF: Goto HHIGROUP |
|  |  | Do not include Medicare prescription drug plans in Commercial Medicare Supplements. Medicare prescription drug plans are collected in Part C. | 4: Goto HHISPECT |

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| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 1. Health Maintenance Organization |  |
|  |  | 2. Fee for Service Plan |  |
|  |  | 3. Commercial Medicare Supplement |  |
|  |  |  |  |
| 14B | 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? | Goto HHIGROUP |
|  |  | 1. Yes |  |
|  |  | 2. No |  |
| 14B | HHISPECT | ? [F1] | 1-3,DK,RF: Goto HHIGROUP |
|  |  | Is this special purpose insurance plan - | 4: Goto OTHINTYP |
|  |  | 1. Dental insurance? |  |
|  |  | 2. Vision insurance? |  |
|  |  | 3. Prescription drug insurance? |  |
|  |  | 4. Other type of special purpose health insurance? - Specify |  |
| 14B | OTHINTYP |  | Goto HHIGROUP |
| 14B | HHIGROUP | Was the policy obtained on an individual or group basis? | 1, 3, DK, RF: IF TRICARE = 1 goto HHIPRYOU ELSE goto PORTAL |
|  |  | 1. Individually obtained | 2: goto HHIPRYOU |
|  |  | 2. Group through place of employment |  |
|  |  | 3. Group through other organization |  |
| 14B | PORTAL | Was the policy obtained through ^${ }^{\text {ST_PORTAL Healthcare.gov? }}$ | 1: goto PORTPLAN |
|  |  | 1. Yes | 2, DK, RF: goto HHIPRYOU |
|  |  | 2. No |  |
| 14B | PORTPLAN | Is this policy a platinum, gold, silver, bronze, or catastrophic plan? | Goto HHIPRYOU |
|  |  | 1. Platinum plan |  |
|  |  | 2. Gold plan |  |
|  |  | 3. Silver plan |  |
|  |  | 4. Bronze plan |  |
|  |  | 5. Catastrophic plan |  |
| 14B | HHIPRYOU | (Do/Does) (youlyour household) pay ANY portion of the premiums for this policy? | 1,DK,RF: Goto HHIPRDED |
|  |  | 1. Yes | 2: Goto HHIPROUT |
|  |  | 2. No |  |
| 14B | HHIPROUT | Who pays the policy premiums? | IF PORTAL = 1 goto PREMSUBS |

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| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  |  | ELSE goto HHIMORE |
|  |  | 1. An employer or union? |  |
|  |  | 2. Another group or persons outside your household? |  |
| 14B | HHIPRDED | Are any premiums paid through payroll deductions? | Goto HHIRPMXB |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 14B | HHIRPMXB | How much (do/does) (youlyour household) currently spend for (entry for HINSCMP/this plan ) (including payroll deductions/ )? | Goto HHIRPMPD |
|  |  | Enter dollar amount for premium payments. <br> Select time period in next question. |  |
| 14B | HHIRPMPD | - Enter time period for premium payments. | 1-9: IF PORTAL = 1 goto PREMSUBS ELSE goto HHIMORE |
|  |  | 1. Once a week | 10,DK,RF: Goto HHIIRGXB |
|  |  | 2. Once every 2 weeks |  |
|  |  | 3. Twice a month |  |
|  |  | 4. Once a month |  |
|  |  | 5. Every 2 months |  |
|  |  | 6. Quarterly (every 3 months) |  |
|  |  |  |  |
|  |  | 8. Twice a year (every 6 months) |  |
|  |  | 9. Once a year |  |
|  |  | 10. Other |  |
| 14B | HHIIRGXB | What was the total expense paid for this policy since (reference month)? | Goto HHICMXXB |
| 14B | HHICMXXB | How much was paid this month? | $\text { IF PORTAL = } 1 \text { goto PREMSUBS }$ ELSE goto HHIMORE |
| 14B | PREMSUBS | Is the cost of the premium subsidized based on (your/your household's) income? | 1: goto HHISUBPD |
|  |  | Subsidized health coverage is insurance with a reduced premium. Low and middle income families are eligible to receive tax credits that allow them to pay lower premiums for insurance bought through healthcare exchanges or marketplaces. | 2, DK, RF: goto HHIMORE |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 14B | HHISUBPD | Is the subsidy paid directly to the health insurance company? | Goto HHIMORE |

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| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 14B | HHIMORE | Did you have any other hospitalization or health insurance plans? | 1: IF ROW number = 12 then goto ERR_MAX ELSE goto IHB_ITEM, next line of grid |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ | 2,DK,RF: Goto IHB_ITEM, next line of grid |
| 14C | CHGHHMCR | (Last time you said that you were enrolled in Medicare. Has that changed?/Last time you said that ^8500HHMCRCOV ^MEMBARE2 enrolled in Medicare. Has | 1: IF NUMHOUSE gt then goto HHMCRCOV <br> ELSEIF 8500.HHPARD $=1$ goto BUPDATEDPblock <br> ELSE goto RETPARTD |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
|  |  |  | 2,DK,RF: IF 8500.HHPARTD $=1$ then goto BUPDATEDP block <br> ELSE goto RETPARTD |
| 14C | HHMCRENR | Are (youlyou or any members of your household) presently enrolled in Medicare? Medicare is the Federal Health Insurance Plan. <br> 1. Yes <br> 2. No | 1: If NUMHOUSE = 1 and ((INTNMBR $=2$ and RT25.DESIGN $=00$ ) or (INTNMBR $=1$ ) or new CU) goto HHPARTD <br> Elseif NUMHOUSE $=1$ and 8500.HHPARTD $=1$ goto BUPDATEDPblock <br> Elseif NUMHOUSE = 1 goto RETPARTD <br> Elseif NUMHOUSE gt 1 goto HHMCRCOV |
|  |  |  | 2,DK,RF: IF 8500.MDCDENR = 1 then goto CHGMDCDE <br> ELSE goto MDCDENR |
| 14C | HHMCRCOV | How many members of your household are covered by Medicare? | ```IF (INTNMBR = 2 and RT25.DESIGN \(=00\) ) OR (INTNMBR = 1) OR new CU then goto HHPARTD ELSEIF 8500.HHPARTD = 1 then goto BUPDATEDP block ELSE goto RETPARTD``` |
| 14C | STILDRUG | Is ^NAME still enrolled in a Medicare Prescription Drug plan? | 1: Goto PREMCHG |
|  |  | Enter 'YES' if the member changed to a different Medicare Prescription Drug plan. 1. Yes 2. No | 2,DK,RF: IF no more members AND there exist values of MEMBNO that do not match any value of 8500.PRTDMBNO then goto RETPARTD <br> ELSEIF no more members AND 8500.MDCDENR ne 1 then goto MDCDENR <br> ELSEIF no more members goto CHGMDCDE |

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| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  |  | ELSE goto next member on 14C_UPDATE |
| 14C | PREMCHG | Is (yourl Name's) premium still (the same/\$(DRGPREMX) )? | 1,DK,RF: IF no more members AND there exist values of MEMBNO that do not match any value of 8500.PRTDMBNO, then goto RETPARTD |
|  |  | 1. Yes <br> 2. No | ELSEIF no more members AND 8500.MDCDENR ne 1 thengoto MDCDENR |
|  |  |  |  |
|  |  | 2. No | CHGMDCDE <br> ELSE goto STILDRUG for next member |
|  |  |  |  |
|  |  |  | 2: Goto PREMCHGX |
| 14C | PREMCHGX | What is (yourl Name's) current premium amount for the Medicare Prescription Drug Plan? | IF no more members AND there exist values of MEMBNO that do not match any value of 8500.PRTDMBNO then goto RETPARTD |
|  |  |  | ELSEIF no more members AND 8500.MDCDENR ne 1 then goto MDCDENR |
|  |  |  | ELSEIF no more members goto CHGMDCDE |
|  |  |  | ELSE goto STILDRUG for next member |
| 14C | RETPARTD | Have (youlyou or any members of your household) enrolled in a Medicare Prescription Drug plan since the first of (reference month)? | 1: IF NUMHOUSE = 1 goto BNEWEDP block ELSE goto DRUGPLAN |
|  |  | - The Medicare Prescription Drug plan is also known as Medicare Part D | 2,DK,RF: IF 8500.MDCDENR = 1 then goto CHGMDCDE <br> ELSEIF 8500.MDCDENR ne 1 then goto |
|  |  | 1. Yes | MDCDENR |
|  |  | 2. No |  |
| 14C | HHPARTD | Are (youlyou or any members of your household) presently enrolled in a Medicare Prescription Drug plan? | 1: IF NUMHOUSE = 1 then goto BNEWDP block ELSE goto DRUGPLAN |
|  |  | - The Medicare Prescription Drug plan is also known as Medicare Part D | 2,DK,RF: Goto MDCDENR |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 14C | DRUGPLAN | Who (is enrolled/enrolled) in a Medicare Prescription Drug plan? | 1-30: Goto BNEWDP block |
|  |  | - Enter line numbers for all that apply, separate with commas. | DK,RF: Goto MDCDENR |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 1. Person 1 |  |
|  |  | 2. Person 2 |  |
|  |  | 3. Person 3 |  |
|  |  | 4. Person 4 |  |
|  |  | 5. Person 5 |  |
|  |  | 6. Person 6 |  |
|  |  | 7. Person 7 |  |
|  |  | 8. Person 8 |  |
|  |  | 9. Person 9 |  |
|  |  | 10. Person 10 |  |
|  |  | 11. Person 11 |  |
|  |  | 12. Person 12 |  |
|  |  | 13. Person 13 |  |
|  |  | 14. Person 14 |  |
|  |  | 15. Person 15 |  |
|  |  | 16. Person 16 |  |
|  |  | 17. Person 17 |  |
|  |  | 18. Person 18 |  |
|  |  | 19. Person 19 |  |
|  |  | 20. Person 20 |  |
|  |  | 21. Person 21 |  |
|  |  | 22. Person 22 |  |
|  |  | 23. Person 23 |  |
|  |  | 24. Person 24 |  |
|  |  | 25. Person 25 |  |
|  |  | 26. Person 26 |  |
|  |  | 27. Person 27 |  |
|  |  | 28. Person 28 |  |
|  |  | 29. Person 29 |  |
|  |  | 30. Person 30 |  |
| 14C | ENROLLYR | In what year did (youl Name) enroll in the prescription drug plan? | IF ENROLLYR gt (current year +3 ) then goto |
|  |  |  | CK_ENROLLYR |
|  |  | - Enter year of enrollment | ELSEIF ENTRY = current year through current year + 2, goto ENROLLMO |
|  |  |  | ELSEIF ENTRY = previous year AND (CUR_MONTH = 1 (January), 2 (February) or 3 (March)) goto |
|  |  |  | ENROLLMO |
|  |  |  | ELSE goto DRGPREMX |
| 14C | ENROLLMO | In what month did (youl Name) enroll in the prescription drug plan? | Goto DRGPREMX |
|  |  | - Enter month of enrollment |  |

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| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
| 14C | DRGPREMX | What is the monthly premium for (yourl Name's) Medicare Prescription Drug plan? <br> - Do not include any monthly co-payments paid by the household. | Goto HHDRGSS |
| 14C | HHDRGSS | Is the monthly premium deducted from a Social Security payment? | IF no more line numbers AND 8500.MDCDENR ne 1 then goto MDCDENR |
|  |  | 1. Yes <br> 2. No | ELSEIF no more line numbers then goto CHGMDCDE |
|  |  |  | ELSE goto ENROLLMO for the next line number entered in DRUGPLAN |
| 14C | CHGMDCDE | (Last time you said that you were enrolled in Medicaid. Has that changed?/Last time you said that ^8500MDCDCOV ^MEMBARE enrolled in Medicaid. Has th | 1: IF NUMHOUSE gt 1 then goto MDCDCOV ELSEIF 8500.OTHMED $=1$ then goto STLOTHMD |
|  |  | 1. Yes <br> 2. No | ELSE goto OTHMED |
|  |  |  | 2,DK,RF: IF 8500.OTHMED $=1$ then goto STLOTHMD <br> ELSE goto OTHMED |
| 14C | MDCDENR | Are (youlyou or any members of your household) enrolled in Medicaid^MDCDSTfill? | 1: IF NUMHOUSE gt 1 then goto MDCDCOV ELSEIF 8500.OTHMED $=1$ then goto STLOTHMD |
|  |  | 1. Yes <br> 2. No | ELSE goto OTHMED |
|  |  |  | 2,DK,RF: IF 8500.OTHMED = 1 then goto STLOTHMD ELSE goto OTHMED |
| 14C | MDCDCOV | How many members of your household are covered by Medicaid^MDCDSTfill? | ELSEIF 8500.OTHMED = 1 then goto STLOTHMD |
|  |  |  | ELSE goto OTHMED |
| 14C | STLOTHMD | [13 33 ? [F1] | Goto S14C_END |
|  |  | Are (youlyou or any members of your household) still covered by a plan such as VA Medical, CHAMPVA, CHIP^ST_CHIP, or Indian Health Service (IHS)? |  |
|  |  | 1. Yes <br> 2. No |  |
| 14C | OTHMED | [14 33 ? [F1] | 1: IF NUMHOUSE gt 1 goto OTHMDCOV ELSE goto S14C_END |
|  |  | Are (youlyou or any members of your household) covered by a plan such as VA Medical, CHAMPVA, CHIP^ST_CHIP, or Indian Health Service (IHS)? | 2, DK, RF: Goto S14C_END |
|  |  | 1. Yes |  |

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| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 2. No |  |
| 14C | OTHMDCOV | How many members of your household are covered by these plans? | Goto S14C_END |
| 15A | S15A_INTRO | [E] 34-35 | Goto MDB_ITEM |
|  |  | Now I am going to ask some questions about medical payments and reimbursements. I will begin with your payments. |  |
|  |  | By payments I mean any co-pays and out-of-pocket expenses. Include all payments, even those for persons who are outside of your household. |  |
|  |  | $\begin{aligned} & \text { Description Amount Month } \\ & (\text { MEDPDESC }) \quad(\text { MEDPMTX })(\text { MEDPMTMO }) \end{aligned}$ |  |
|  |  | 1. Enter 1 to Continue |  |
| 15A | MDB_ITEM | SCREEN 1 $\qquad$ <br> 34 ? [F1] | 1-15: Goto MEDPDESC |
|  |  |  | 95: Goto next ROW |
|  |  | Since the first of (reference month), have (youlyou or any members of your household) made any payments for the following? | 99: Goto S15A_END |
|  |  | - Read each item on list | 888: IF no more rows then goto S15A_END ELSE goto MDB_ITEM - next row of the table |
|  |  | SCREEN 2 $\qquad$ <br> 35 ? [F1] |  |
|  |  | Have (youlyou or any members of your household) made any payments for -- <br> - 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 |  |
|  |  | 7. 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 |  |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 12. Hearing aids <br> 13. Prescription drugs <br> 14. Purchase or rental of supportive or rehabilitative equipment <br> 15. Purchase or rental of medical or surgical equipment for general use <br> 95. Continue List <br> 99. None/No more entries <br> 888. Delete a line |  |
| 15A | MEDPDESC | Ask if not apparent <br> Describe the care/servicelitem. <br> Description Amount Month (MEDPDESC) (MEDPMTX) (MEDPMTMO) | IF MDB_ITEM = 14 or 15 then goto MEDPPRNT ELSE goto MEDPGFTC |
| 15A | MEDPPRNT | - Ask if not apparent <br> Was this for a purchase or rental? <br> Description Amount Month <br> (MEDPDESC) (MEDPMTX) (MEDPMTMO) <br> 1. Purchase <br> 2. Rental | Goto MEDPGFTC |
| 15A | MEDPGFTC | Ask if not apparent <br> (Was/Were) the (description) for a member of your household or someone outside of your household? <br> Description Amount Month <br> (MEDPDESC) (MEDPMTX) (MEDPMTMO) <br> 1. Household member <br> 2. Non-household member | Goto MEDPMTMO |
| 15A | MEDPMTMO | 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 | Goto MEDPMTX |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 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 |  |
| 15A | MEDPMTX | (What was the total amount paid in (month)?/What was the total amount paid?/What is your monthly expense?) <br> Description Amount Month <br> (MEDPDESC) (MEDPMTX) (MEDPMTMO) | Goto MEDPCB_S |
| 15A | MEDPCB_S | - Enter 'C' for a combined expense | C: Goto MEDPCMB EMPTY: Goto MEDPMORE |
| 15A | MEDPCMB | [124 34-35 ? [F1] <br> What is (description) combined with? <br> Enter all that apply, separate with commas <br> Description Amount Month (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 | Goto MEDPMORE |



| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | SCREEN 2 $\qquad$ <br> ? [F1] |  |
|  |  | Have you received any reimbursements for -- <br> - Read each item on list |  |
|  |  | 1. Eye examinations, treatment, 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. Purchase or rental of supportive or rehabilitative equipment <br> 15. Purchase or rental of medical or surgical equipment for general use <br> 95. Continue List <br> 99. None/No more entries <br> 888. Delete a line |  |
| 15B | MEDRDESC | Ask if not apparent <br> Describe the care/servicelitem. <br> Description Amount Month (MEDRDESC) (MEDRMBX) (MEDRMBMO) | IF ITEM = 14 or 15 then goto MEDRPRNT ELSE goto MEDRGFTC |
| 15B | MEDRPRNT | - Ask if not apparent | Goto MEDRGFTC |

## Was this for a purchase or rental?

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

1. Purchase

| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 2. Rental |  |
| 15B | MEDRGFTC | - Ask if not apparent | Goto MEDRMBMO |
|  |  | (Was/Were) the (description) for a member of your house household? |  |
|  |  | Description Amount Month (MEDRDESC) (MEDRMBX) (MEDRMBMO) |  |
|  |  | 1. Household member <br> 2. Non-household member |  |
| 15B | MEDRMBMO | In what month was(were) the reimbursement(s) received? | Goto MEDRMBX |
|  |  | $\frac{\text { Description Amount } \text { Month }}{(\text { MEDRDESC })(\text { MEDRMBX })(M E D R M B M O)}$ |  |
|  |  | 1. January |  |
|  |  | 2. February |  |
|  |  | 3. March |  |
|  |  | 4. April |  |
|  |  | 5. May |  |
|  |  | 6. June |  |
|  |  | 7. July |  |
|  |  | 8. August |  |
|  |  | 9. September |  |
|  |  | 10. October |  |
|  |  | 11. November |  |
|  |  | 12. December |  |
| 15B | MEDRMBX | What was the total amount received (in month)? | Goto MEDRCB_S |
|  |  | Description Amount Month (MEDRDESC) (MEDRMBX) (MEDRMBMO) |  |
| 15B | MEDRCB_S | - Enter 'C' for a combined reimbursement | C: Goto MEDRCMB |
|  |  |  | EMPTY: Goto MEDRMORE |
| 15B | MEDRCMB | [1] 34-35 ? [F1] | Goto MEDRMORE |
|  |  | What other medical reimbursement is (description) combined with? |  |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
| - Enter all that apply, separate with commas |  |  |  |
| (MEDRDESC) (MEDRMBX) (MEDRMBMO) |  |  |  |
| 1. Eye examinations, treatments, 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 |  |  |  |
|  |  | 7. 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. Purchase or rental of supportive or rehabilitative equipment |  |
|  |  | 15. Purchase or rental of medical or surgical equipment for general use |  |
|  |  | 77. Misc. combined (unable to specify/DK) |  |
| 15B | MEDRMORE | Did (youlyou or any members of your household) receive any other reimbursements for (description)? | 1: IF ROW number = 22 then goto ERR_MAX ELSE goto MDC_ITEM, next line of grid |
|  |  | Description Amount Month (MEDRDESC) (MEDRMBX) (MEDRMBMO) | 2,DK,RF: IF ROW number $=22$ then goto S15B_END ELSE goto MDC_ITEM, next line of grid |
|  |  | 1. Yes |  |
| 16 | EDA_INTRO | 2. No | Goto EDA_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. |  |
|  |  | - Do NOT include payments made on student loans |  |
|  |  | Description Type Month Amount |  |
|  |  | (EDUDESC) (EDSHL_A) (EDMONTHA) (EDEXOXA) |  |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
| 1. Enter 1 to Continue |  |  |  |
| 16 | EDA_ITEM | [1736 ? [F1] | 1-9: Goto EDUDESC |
|  |  | Since the first of (reference month), have (youlyou or any members of your household) paid for any - | 99: Goto S16_END |
|  |  | - Read each item on list. <br> - Baby sitting and in home day care are collected in Section 19A <br> - Do not include payments on student loans. They are collected in Section 22. | 888: IF no more grid lines then goto S16_END ELSE goto EDA_ITEM - next line of grid |
|  |  | 1. Recreational lessons or other instructions? |  |
|  |  | 2. Preschool or child day care centers? |  |
|  |  | 3. Tuition, including pre-paid tuition? |  |
|  |  | 4. Housing while attending school? |  |
|  |  | 5. Food or board while attending school? |  |
|  |  | 6. Private school bus service? |  |
|  |  | 7. Test preparation or tutoring services? |  |
|  |  | 8. Purchase of any school books, supplies, or equipment which has not already been reported? |  |
|  |  | 9. Other school related expenses not already reported? |  |
|  |  | 99. None/No more entries |  |
|  |  | 888. Delete the line |  |
| 16 | EDUDESC | What was the expense for? | Goto EDUCGFTC |
|  |  | Description Type Month Amount |  |
|  |  | (EDUDESC) (EDSHL_A) (EDMONTHA) (EDEXOXA) |  |
| 16 | EDUCGFTC | Was this expense for? | IF ITEM $=3$ or 8 then goto EDSCHL_A ELSE goto EDMONTHA |
|  |  | Description Type Month Amount |  |
|  |  | (EDUDESC) (EDSHL_A) (EDMONTHA) (EDEXOXA) |  |
|  |  | 1. Someone inside the household? <br> 2. Someone outside the household? |  |
|  |  |  |  |
| 16 | EDSCHL_A | - Ask if not apparent. | Goto EDMONTHA |
|  |  | What kind of school or facility was it? |  |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | (EDUDESC) (EDSHL_A) (EDMONTHA) (EDEXOXA) |  |
|  |  | 1. College or university |  |
|  |  | 2. Elementary through high school |  |
|  |  | 3. Child day care center |  |
|  |  | 4. Nursery school or preschool |  |
|  |  | 5. Vocational or technical school |  |
|  |  | 6. Other |  |
| 16 | EDMONTHA | In what month was the payment made? | Goto EDEXOXA |

- Enter 13 for same amount each month of the reference period.

Description Type Month Amount (EDUDESC) (EDSHL_A) (EDMONTHA) (EDEXOXA)

1. January
2. February
3. March
4. April
5. May
6. June
7. July
8. August
9. September
10. October
11. November
12. December
13. December
14. Same amount each month
(How much was paid?/How much is paid monthly?)
Goto EDUCMB_S
Description Type Month Amount
(EDUDESC) (EDSHL_A) (EDMONTHA) (EDEXOXA)

- Enter 'C' for a combined expense
[楽 36 ? [F1]
C: Goto EDUCMB
EMPTY: Goto EDREIMB
Goto EDREIMB

What was combined with (Description)?

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

- Enter all that apply, separate with commas

Description Type Month Amount
(EDUDESC) (EDSHL_A) (EDMONTHA) (EDEXOXA)

## 1. Recreational lessons or other instructions

2. Preschool or child day care centers
3. Tuition, including pre-paid tuition
4. Housing while attending school
5. Food or board while attending school
6. Private school bus service
7. Test preparation or tutoring services
8. Purchase of any school books, supplies, or equipment which has not already been reported
9. Other school related expenses not already reported

16 EDREIMB
Has any of this amount been or will any of it be reimbursed
by an employer, agency, or other person?

- Do not include reimbursements from dependent flexible spending accounts (FSA)

Description Type Month Amount
(EDUDESC) (EDSHL_A) (EDMONTHA) (EDEXOXA)

1. Yes
2. No

16 EDREIMBX How much was or will be reimbursed

Do not include reimbursements from dependent flexible spending accounts (FSA).
$\frac{\text { Description Type Month Amount }}{(E D U D E S C)\left(E D S H L \_A\right)(E D M O N T H A)}$ (EDEXOXA)

Did you make any other payments for (Description)?
1: IF ROW number = 34 then goto ERR_MAX
Description Type Month Amount
$\frac{\text { Description Type Month Amount }}{(\text { EDUDESC ) (EDSHL_A) (EDMONTHA) (EDEXOXA) }}$
1: Goto EDREIMBX
2,DK,RF: Goto EDUMORE

2,DK,RF: IF ROW number $=34$ then goto S16_END ELSE goto EDA_ITEM, next line of grid

1. Yes
2. No

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| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
| 17 | SUB_INTRO | [] 37-38 | Goto SUB_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. Also, include any shipping and handling charges with the cost of any item that was shipped. <br> Description Month Amount <br> (SUBDESC) (SUBMO) (SUBEXPX) |  |
|  |  | 1. Enter 1 to Continue |  |
| 17A | SUB_ITEM |  | 1-26: Goto SUBDESC |
|  |  | [17 37 ? [F1] | 95: Goto next row |
|  |  | Since the first of (reference month) have (youlyou or any members of your household) had any membership costs or other expenses related to any of the following? Do not include contributions to or membership in religious, professional, business, or other tax deductible organizations. <br> Read each item on list. | 99: Goto S17A_END <br> 888: IF no more grid lines goto S17A_END ELSE goto SUB_ITEM - next line of grid |
|  |  | SCREEN 2-------------------------------------------------- |  |
|  |  | [13 37 ? [F1] |  |
|  |  | Since the first of (reference month), have (youlyou or any members of your household) purchased any of the following items for your household or for someone outside your household? <br> Read each item on list |  |
|  |  | SCREEN 3-------------------------------------------------- |  |
|  |  | [4] 38 ? [F1] |  |
|  |  | Have you purchased any - |  |


| Section | CAPI Variable Name | Question Text |
| :--- | :--- | :--- |
|  | $\bullet$ Read each item on list |  |
|  |  | Report blank tapes, CDs, and DVDs in Section 6B under item code 11 |

1. Golf courses or country clubs
2. Health clubs, fitness centers, swimming pools, weight loss centers, or other sports or
recreational organizations
3. Fees for participating in sports such as golf, bowling, biking, hockey, football, or swimming
4. Vacation clubs
5. Civic, service, fraternal, or other social organizations
6. Credit card membership fees
7. Shopping club memberships including warehouse clubs like Sam's Club and discount memberships like Amazon Prime
8. Direct or online dating services
9. Single or season tickets to spectator sports events such as football, baseball, hockey racing, or
track events
10. Single or season tickets to plays, operas, or concerts
11. Tickets to movies, parks, or museums
12. Single copies of newspapers, magazines, or periodicals, including digital
13. Subscriptions to newspapers, magazines, or periodicals, including digital
14. Books purchased through a book club
15. Books or digital books not purchased through a book club. Do not include school books or
reference books.
16. Photographic film or disposable cameras
17. Photo printing or processing
18. Purchased music files, CDs, or records
19. Subscription music services such as Rhapsody or Pandora
20. Purchased video files, Blu-Ray discs, or DVDs
21. Rented video files or DVDs
22. Streaming video subscription
23. Purchased video games, not including computer games
24. Rented video games
25. Applications, games, or ringtones for a cellphone or mobile device not already reported
26. Online games or other internet entertainment sites
27. Continue list
28. None/No more entries
29. Delete the line
(Description)
fill for SUBDESC


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
| Description Month Amount(SUBDESC) (SUBMO) (SUBEXPX) |  |  |  |
| 17A | S17ACMB | [E] 38 ? [F1] | Goto S17AOTHR |
|  |  | What other expense is the (description) combined with? |  |
|  |  |  |  |
|  |  | Description Month Amount |  |
|  |  | (SUBDESC) (SUBMO) (SUBEXPX) |  |
|  |  | 18. Purchased music files, CDs, or records |  |
|  |  | 20. Purchased video files, Blu-Ray discs, or DVDs |  |
|  |  | 21. Rented video files or DVDs |  |
|  |  | 22. Streaming video subscriptions |  |
|  |  | 25. Applications, games, or ringtones for a cellphone or mobile device not already reported |  |
| 17A | TICSTORE | Where did you purchase these tickets? | IF ENTRY contains ".com", ".Com", ".cOm", ".coM", <br> ".COm", ".CoM", ".cOM", or ".COM", then goto MORE |
|  |  | If purchased from a private individual, enter "private individual." | ELSEIF ENTRY = DK or RF then goto MORE |
|  |  |  | ELSE goto TICPURCH |
| 17A | TICPURCH | - Ask if not apparent | 1,DK,RF: Goto MORE |
|  |  | Was this purchased online or in-person? | 2: Goto TICLOC |
|  |  | 1. Online <br> 2. In person |  |
| 17A | TICLOC | Where is ^ ^ICSTORE_fill located? | Goto MORE |
|  |  | - Enter city and state |  |
| 17A | S17AOTHR | Did you (purchase/pay for renting/pay for) any other (description)? | 1: IF ROW number = 40 then goto ERR_MAX ELSE goto SUB_ITEM, next line of grid |
|  |  | Description Month Amount |  |
|  |  | (SUBDESC) (SUBMO) (SUBEXPX) | 2,DK,RF: Goto SUB_ITEM, next line of grid |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 18A | ANYOUTSD | Now I am going to ask about trips and vacations. | 1: Goto NUMOUTSD |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | Since the first of (reference month) have (you/you or any members of your household) taken any trips entirely paid for by anyone outside your household, such as a business, employer, or relative? | 2,DK,RF: IF I_18Acoun gt 0 then goto TBLSECT18A_1 ELSE goto ANYTRIPS |
|  |  | 1. Yes <br> 2. No |  |
| 18A | NUMOUTSD | How many? | Goto ANYYUPD |
| 18A | ANYYUPD | Even on trips entirely paid for by someone outside of your household there are sometimes miscellaneous expenses which are not paid for. Did (youlyour household) have any expenses <br> on (this trip/these trips) that will not be covered by a business, employer or other nonhousehold member? | 1: Goto FOODYUPD 2,DK,RF: Goto CHKUNTRP |
|  |  | 1. Yes <br> 2. No |  |
| 18A | FOODYUPD | Did these expenses include anything for . . . ... Food and beverages? | Goto LODGYUPD |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 18A | LODGYUPD | Did these expenses include anything for ... Lodging? | Goto TRANYUPD |
|  |  | 1. Yes <br> 2. No |  |
| 18A | TRANYUPD | Did these expenses include anything for . . . . . . Transportation? | Goto ELSEYUPD |
|  |  | 1. Yes 2. No |  |
| 18A | ELSEYUPD | Did these expenses include . . . | 1: Goto S18AELSE |
|  |  | ... Anything else? | 2,DK,RF: Goto TOTYUPDX |

Section CAPI Variable Name Question Text


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | * Business? <br> * Recreational trips? <br> * Other trips overnight or longer? <br> * Day trips of at least 75 miles away from home? |  |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 18A2 | TRIPPLAC | Where did (youlyour household) go? | 30 characters: Goto DESTCODE |
|  |  | - Enter 888 to delete the trip | 888: Goto S18MORE |
|  |  | Destination Ended How paid Number of trips (TRPPLACE) (ENDTRP2) (ANYBOTH2) (NUMTRIPS) |  |
| 18A2 | DESTCODE | ? [F1] | 2 character state abbrev.,DK,RF: Goto ENDTRP2 |
|  |  | - Type state abbreviation for a U.S. destination or X for foreign country destination | X: Goto FOREIGN |
|  |  | Destination Ended How paid Number of trips (TRPPLACE) (ENDTRP2) (ANYBOTH2) (NUMTRIPS) |  |
| 18A2 | FOREIGN | - Select the country or region. | Goto ENDTRP2 |
|  |  | 1. Africa |  |
|  |  | 2. Asia |  |
|  |  | 3. Australia |  |
|  |  | 4. Canada |  |
|  |  | 5. Caribbean |  |
|  |  | 6. Central America |  |
|  |  | 7. Europe |  |
|  |  | 8. Mexico |  |
|  |  | 9. Middle East |  |
|  |  | 10. South America |  |
|  |  | 11. South Pacific |  |
| 18A2 | ENDTRP2 | In what month did this trip end? | 0: Goto S18MORE |
|  |  | - (0) Trip not ended | REF_MONTH-CUR_MONTH: Goto MORTHONE |
|  |  | Destination Ended How paid Number of trips | DK,RF: Goto MORTHONE |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 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 |  |
| 18A2 | 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,DK,RF: Goto ANYBOTH2 |
|  |  | 1. Yes <br> 2. No |  |
| 18A2 | NUMTRIPS | How many times did you go to (trip destination) in (month trip ended)? <br> Destination Ended How paid Number of trips <br> (TRPPLACE) (ENDTRP2) (ANYBOTH2) (NUMTRIPS) | Goto ANYBOTH2 |
| 18A2 | ANYBOTH2 | Were any of the expenses for (this trip/these trips) paid for by anyone outside of your household? <br> Destination Ended How paid Number of trips <br> (TRPPLACE) (ENDTRP2) (ANYBOTH2) (NUMTRIPS) <br> 1. Yes <br> 2. No | Goto S18MORE |
| 18A2 | S18MORE | [E] 40 ? [F1] <br> Since the first of (reference month), have you taken any other trips for reasons such as: <br> * Visiting relatives or friends? | 1: $\quad$ Goto TRIPPLAC, next line on the grid <br> 2,DK,RF: Goto S18A_END |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | * Business? <br> * Recreational trips? <br> * Other trips overnight or longer? <br> * Day trips of at least 75 miles away from home? |  |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 18BC | NUMNIGHT | (Now I'm going to ask you about the ^TRIP that ^YOU_YRCU took to ^TRPPLACE ending in ^NUMNIGHTC/You | 0-800: Goto PKGTRIP |
|  |  | (Since (youlyour CU) took a set of similar trips to (Trip destination) in (month trip ended), I wil | DK,RF: Goto PKGTRIP <br> 888: Goto S18BC_END |
|  |  | How many nights did (youlyou or any members of your household) spend away from home on (these trips/this trip)? |  |
|  |  | - Enter 0 for none <br> - Enter 888 to delete this trip |  |
| 18BC | PKGTRIP | (Sometimes when people take a trip they have some sort of package deal that covers some or all of the costs.l ) | 1: Goto FOODDEAL |
|  |  | Was all or part of (these trips/this trip) covered by a package deal? | 2,DK,RF: Goto TRPTRNS |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 18BC | FOODDEAL | Did the package deal include . . . | Goto LODGDEAL |
|  |  | . . . Food and beverages? |  |
|  |  | 1. Yes 2. No |  |
| 18BC | LODGDEAL | Did the package deal include . . . | Goto TRANDEAL |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |



| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | (other than what the package deal covered/ )? | CMTRAINX <br> ELSEIF 4 is selected in TRPTRNS then goto CMBUSX <br> ELSEIF 5 is selected in TRPTRNS then goto CMSHIPX <br> ELSEIF 6 is selected in TRPTRNS then goto RTCARX <br> ELSEIF 7 is selected in TRPTRNS then goto <br> RTMOPEDX <br> ELSEIF 8 is selected in TRPTRNS then goto <br> RTPLANEX <br> ELSEIF 9 is selected in TRPTRNS then goto RTBOATX <br> ELSEIF 10 is selected in TRPTRNS then goto <br> RTCAMPX <br> ELSEIF 11 is selected in TRPTRNS then goto <br> RTOTHERX <br> ELSEIF 12-14 are selected in TRPTRNS then goto <br> ANYGAS <br> ELSE goto LODGING |
| 18BC | CMPLANEX | How much did (youlyou or any members of your household) spend for airfare (other than what the package deal covered/ )? | IF 3 is selected in TRPTRNS then goto CMTRAINX <br> ELSEIF 4 is selected in TRPTRNS then goto CMBUSX <br> ELSEIF 5 is selected in TRPTRNS then goto CMSHIPX <br> ELSEIF 6 is selected in TRPTRNS then goto RTCARX <br> ELSEIF 7 is selected in TRPTRNS then goto <br> RTMOPEDX <br> ELSEIF 8 is selected in TRPTRNS then goto <br> RTPLANEX <br> ELSEIF 9 is selected in TRPTRNS then goto RTBOATX <br> ELSEIF 10 is selected in TRPTRNS then goto <br> RTCAMPX <br> ELSEIF 11 is selected in TRPTRNS then goto <br> RTOTHERX <br> ELSEIF 12-14 are selected in TRPTRNS then goto <br> ANYGAS <br> ELSE goto LODGING |
| 18BC | CMTRAINX | How much did (youlyou or any members of your household) spend for train fare (other than what the package deal covered/ )? | IF 4 is selected in TRPTRNS then goto CMBUSX ELSEIF 5 is selected in TRPTRNS then goto CMSHIPX ELSEIF 6 is selected in TRPTRNS then goto RTCARX ELSEIF 7 is selected in TRPTRNS then goto RTMOPEDX <br> ELSEIF 8 is selected in TRPTRNS then goto RTPLANEX <br> ELSEIF 9 is selected in TRPTRNS then goto RTBOATX ELSEIF 10 is selected in TRPTRNS then goto |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  |  | RTCAMPX <br> ELSEIF 11 is selected in TRPTRNS then goto <br> RTOTHERX <br> ELSEIF 12-14 are selected in TRPTRNS then goto <br> ANYGAS <br> ELSE goto LODGING |
| 18BC | CMBUSX | How much did (youlyou or any members of your household) spend for bus fare (other than what the package deal covered/ )? | IF 5 is selected in TRPTRNS then goto CMSHIPX <br> ELSEIF 6 is selected in TRPTRNS then goto RTCARX <br> ELSEIF 7 is selected in TRPTRNS then goto <br> RTMOPEDX <br> ELSEIF 8 is selected in TRPTRNS then goto <br> RTPLANEX <br> ELSEIF 9 is selected in TRPTRNS then goto RTBOATX <br> ELSEIF 10 is selected in TRPTRNS then goto <br> RTCAMPX <br> ELSEIF 11 is selected in TRPTRNS then goto <br> RTOTHERX <br> ELSEIF 12-14 are selected in TRPTRNS then goto <br> ANYGAS <br> ELSE goto LODGING |
| 18BC | CMSHIPX | How much did (youlyou or any members of your household) spend for ship fare (other than what the package deal covered/ )? | IF 6 is selected in TRPTRNS then goto RTCARX <br> ELSEIF 7 is selected in TRPTRNS then goto <br> RTMOPEDX <br> ELSEIF 8 is selected in TRPTRNS then goto <br> RTPLANEX <br> ELSEIF 9 is selected in TRPTRNS then goto RTBOATX <br> ELSEIF 10 is selected in TRPTRNS then goto <br> RTCAMPX <br> ELSEIF 11 is selected in TRPTRNS then goto <br> RTOTHERX <br> ELSEIF 12-14 are selected in TRPTRNS then goto <br> ANYGAS <br> ELSE goto LODGING |
| 18BC | RTCARX | How much did (youlyou or any members of your household) spend for rented automobiles, trucks or vans, not including gas (youlyou or any members of your household) bought (other than what the package deal covered )? <br> (* Do not include any rental costs already collected in Section 10 /) | IF 7 is selected in TRPTRNS then goto RTMOPEDX <br> ELSEIF 8 is selected in TRPTRNS then goto <br> RTPLANEX <br> ELSEIF 9 is selected in TRPTRNS then goto RTBOATX <br> ELSEIF 10 is selected in TRPTRNS then goto <br> RTCAMPX <br> ELSEIF 11 is selected in TRPTRNS then goto <br> RTOTHERX |

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| :---: | :---: | :---: | :---: |
|  |  |  | ELSE goto ANYGAS |
| 18BC | RTMOPEDX | How much did (youlyou or any members of your household) spend for rented motorcycles or mopeds, not including gas (youlyou or any members of your household) bought (other than what the package deal covered/ )? <br> (* Do not include any rental costs already collected in Section 10 / ) | IF 8 is selected in TRPTRNS then goto RTPLANEX <br> ELSEIF 9 is selected in TRPTRNS then goto RTBOATX <br> ELSEIF 10 is selected in TRPTRNS then goto <br> RTCAMPX <br> ELSEIF 11 is selected in TRPTRNS then goto <br> RTOTHERX <br> ELSE goto ANYGAS |
| 18BC | RTPLANEX | How much did (youlyou or any members of your household) spend for rented private planes, <br> not including gas (youlyou or any members of your household) bought (other than what the package deal covered/ )? <br> (*Do not include any rental costs already collected in Section 10 /) | IF 9 is selected in TRPTRNS then goto RTBOATX ELSEIF 10 is selected in TRPTRNS then goto RTCAMPX <br> ELSEIF 11 is selected in TRPTRNS then goto RTOTHERX <br> ELSE goto ANYGAS |
| 18BC | RTBOATX | How much did (youlyou or any members of your household) spend for rented boats or trailers, not including gas (youlyou or any members of your household) bought (other than what the package deal covered/ )? <br> (* Do not include any rental costs already collected in Section 10 / ) | IF 10 is selected in TRPTRNS then goto RTCAMPX ELSEIF 11 is selected in TRPTRNS then goto RTOTHERX ELSE goto ANYGAS |
| 18BC | RTCAMPX | How much did (youlyou or any members of your household) spend for rented campers, not including gas (youlyou or any members of your household) bought (other than what the package deal covered/ )? <br> (* Do not include any rental costs already collected in Section 10 / ) | IF 11 is selected in TRPTRNS then goto RTOTHERX ELSE goto ANYGAS |
| 18BC | RTOTHERX | How much did (youlyou or any members of your household) spend for other rented vehicle transportation, not including gas (youlyou or any members of your household) bought (other than what the package deal covered/ )? <br> (* Do not include any rental costs already collected in Section 10 / ) | Goto ANYGAS |
| 18BC | ANYGAS | While on the trip did (youlyou or any members of your household) stop to buy any gasoline, diesel fuel, or any other fuels? <br> 1. Yes <br> 2. No | 1: Goto GASOILX <br> 2,DK,RF: Goto ANYTOLL |
| 18BC | GASOILX | (How much did ^YOU_ANYMEM spend for that?/What costs for gasoline or other fuels won't be reimbursed?) | Goto ANYTOLL |
| 18BC | ANYTOLL | While on the trip, did (youlyou or any members of your household) spend anything for tolls, not already reported? | 1: Goto TRPTOLLX |

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|  |  |  | 2,DK,RF Goto ANYPARK |
|  |  | 1. Yes |  |
|  |  | 2. No |  |
| 18BC | TRPTOLLX | (How much did ^YOU_ANYMEM spend for tolls?/What costs for tolls won't be reimbursed?) | Goto ANYPARK |
| 18BC | ANYPARK | Did (youlyou or any members of your household) have any parking fees? | 1: Goto PARKINGX |
|  |  |  | 2,DK,RF: Goto LODGING |
|  |  | 1. Yes |  |
|  |  | 2. No |  |
| 18BC | PARKINGX | (How much were they?/What cost for parking fees won't be reimbursed?) | IF entry gt 100 and (ne DK or RF) then goto ERR1_PARKINGX <br> ELSE goto LODGING |
| 18BC | LODGING | Did (youlyou or any members of your household) spend anything for hotels, 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,DK,RF: Goto TRPFOOD |
|  |  | 1. Yes <br> 2. No |  |
| 18BC | LDGCOSTX | (What was the cost, including taxes and tips?/What costs for lodging, including taxes and tips, won't be reimbursed?) | Goto TRPFOOD |
| 18BC | TRPFOOD | Did (youlyou or any members of your household) spend anything for meals, snacks, or drinks at restaurants, bars, or fast food places (not counting what the package deal covered/ )? | 1: Goto TRPFOODX 2,DK,RF: Goto ANYGROC |
|  |  | 1. Yes <br> 2. No |  |
| 18BC | TRPFOODX | (What was the cost, including taxes and tips?/What costs for these things won't be reimbursed?) | Goto TRPALCIN |
| 18BC | TRPALCIN | Was any of the (amount/\$ (entry in TRPFOODX) for alcoholic beverages? | 1: Goto TRPALCHX |
|  |  | 1. Yes <br> 2. No | 2,DK,RF: Goto ANYGROC |
| 18BC | 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 | Goto ANYGROC |
| 18BC | ANYGROC | Did (youlyou or any members of your household) spend anything for food or beverages at grocery stores, | 1: Goto TRPGROCX |

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| :---: | :---: | :---: | :---: |
|  |  | convenience stores, or liquor stores on this trip? | 2,DK,RF: Goto ANYSPEQP |
|  |  | 1. Yes <br> 2. No |  |
| 18BC | TRPGROCX | (What were the expenses, including taxes?/What costs, including taxes, won't be reimbursed?) | Goto ANYALC |
| 18BC | ANYALC | Was any of the (amount/\$ (entry in TRPGROCX) ) for alcoholic beverages? | 1: Goto TRPALCGX |
|  |  | 1. Yes <br> 2. No | 2,DK,RF: Goto ANYSPEQP |
| 18BC | TRPALCGX | (What was the cost for alcoholic beverages, including taxes?/What costs for alcoholic beverages, including taxes, won't be reimbursed?) | Goto ANYSPEQP |
| 18BC | ANYSPEQP | [14 40 ? [F1] | 1: Goto TRPSPRTX |
|  |  | Did (youlyou or any members of your household) pay any fees to play sports, exercise, or rent an sports equipment (not counting what the package deal covered/ )? | 2,DK,RF: Goto ANYENTER |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 18BC | TRPSPRTX | E4 40 | Goto ANYENTER |
|  |  | (How much did (youlyou or any member of your CU) pay?/What costs for playing sports or renting sports equipment won't be reimbursed?) |  |
| 18BC | ANYENTER | [E] 40 ? [F1] | 1: Goto TRPETRTX |
|  |  | Did (youlyou or any members of your household) spend anything on this trip for entertainment or admissions (not counting what the package deal covered/ )? | 2,DK,RF: Goto ANYMISC |
|  |  | 1. Yes <br> 2. No |  |
| 18BC | TRPETRTX | (How much did (youlyou or any member of your CU) spend?/What costs for entertainment and admissions won't be reimbursed?) | Goto ANYMISC |
| 18BC | ANYMISC | Did (youlyou or any members of your household) have any expenses for this trip such as for souvenirs, tourist booklets, and so on? <br> 1. Yes | 1: Goto TRMISCX <br> 2,DK,RF: Exit block and goto CHKTCOMB |

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| :---: | :---: | :---: | :---: |
|  |  | 2. No |  |
| 18BC | TRMISCX | (How much were these expenses?/What costs for these things won't be reimbursed?) | Exit block and goto CHKTCOMB |
| 18BC | CHKTCOMB | Are there combined expenses for this trip the respondent was not able to separate? | 1: Goto TCOMBEST <br> 2: Goto TRPGFTC |
|  |  | 1. Yes <br> 2. No |  |
| 18BC | TCOMBEST | (Only those expenses the respondent could not provide individual expenses for should be combined and entered here./ | Goto FOODCOMB |
| 18BC | FOODCOMB | Does this (\$ (entry in TCOMBEST) ) include anything for . . . . . Food? | Goto LODGCOMB |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 18BC | LODGCOMB | Does this (\$ (entry in TCOMBEST) ) include anything for . . Lodging | Goto TRANCOMB |
|  |  | 1. Yes <br> 2. No |  |
| 18BC | TRANCOMB | Does this (\$ (entry in TCOMBEST) ) include anything for . . . . Transportation? | Goto ELSECOMB |
|  |  | 1. Yes 2. No |  |
| 18BC | ELSECOMB | Does this (\$ (entry in TCOMBEST) ) include anything for . . ... Other expenses? | Goto OTHRCOMB |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 18BC | OTHRCOMB | Does this (\$ (entry in TCOMBEST) ) include . . . | Goto TRPGFTC |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | . . . Any expenses for others? |  |
|  |  | 1. Yes 2. No |  |
| 18BC | TRPGFTC | (You've told me about many expenses (youlyou or your CU) had on this trip. Were any of these expens | 1: Goto TRPGTCX |
|  |  | 1. Yes <br> 2. No |  |
| 18BC | TRPGFTCX | (How much of the total expenses for this trip were for persons outside your CU?/How much of the tota | Goto S18BC_END |
| 18E | 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 (reference month), have (youlyou or any members of your household) paid for part or all of such a trip for any non-household members? | 1: Goto FOODNOCU 2,DK,RF: Goto S18E_END |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 18E | FOODNOCU | Did these expenses include anything for... ... Food and beverages? | Goto LODGNOCU |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 18E | LODGNOCU | Did these expenses include anything for... . . Lodging? | Goto TRANNOCU |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 18E | TRANNOCU | Did these expenses include anything for... ... Transportation? | Goto ELSENOCU |

1. Yes

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|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| :---: | :---: | :---: | :---: |
| 18F | ELSELCDL | Did the package deal include . . . | 1: Goto S18FELSE |
|  |  | . . Anything else? | 2,DK,RF: Goto LOCDEALX |
|  |  | 1. Yes <br> 2. No |  |
| 18F | S18FELSE | - Specify: | Goto LOCDEALX |
| 18F | LOCDEALX | How much did (youlyou or any members of your household) pay for the package deal? | Goto ANYLODGE |
| 18F | ANYLODGE | Did (youlyou or any members of your household) spend anything for hotels, motels, cottages, trailer camps, or other lodging (not counting what the package deal covered/ )? <br> 1. Yes <br> 2. No | 1: Goto LOCLODGX <br> 2,DK,RF: Goto ANYMEAL |
| 18F | LOCLODGX | What was the cost, including taxes and tips? | Goto ANYMEAL |
| 18F | ANYMEAL | Did (youlyou or any members of your household) spend anything for meals, snacks, or drinks at restaurants, bars, or fast food places (not counting what the package deal covered/ )? <br> 1. Yes <br> 2. No | 1: Goto LOCMEALX <br> 2,DK,RF: Goto ANYLCGR |
| 18F | LOCMEALX | What was the cost, including taxes and tips? | Goto ANYALCML |
| 18F | ANYALCML | Was any of the (amount/(entry in LOCMEALX)) for alcoholic beverages? | 1: Goto ALCMEALX |
|  |  | 1. Yes 2. No | 2,DK,RF: Goto ANYLCGR |
| 18F | ALCMEALX | What was the cost for alcoholic beverages, including taxes and tips? | Goto ANYLCGR |
| 18F | ANYLCGR | Did (youlyou or any members of your household) spend anything for food or beverages at grocery stores, convenience stores, or liquor stores? | 1: Goto LOCGROCX <br> 2,DK,RF: Goto ANYADMIS |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 18F | LOCGROCX | What were the expenses, including taxes? | Goto ANYALCGR |
| 18F | ANYALCGR | Was any of the (amount/ entry in LOCGROCX) for alcoholic beverages? | 1: Goto ALCGROCX |
|  |  |  | 2,DK,RF: Goto ANYADMIS |

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|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 18F | ALCGROCX | What was the cost for alcoholic beverages, including taxes? | Goto ANYADMIS |
| 18F | ANYADMIS | LH 40 ? [F1] | 1: Goto LOCADMSX |
|  |  | Did (youlyou or any members of your household) spend anything on this stay for entertainment or admissions (not counting what the package deal covered/ )? | 2,DK,RF: Goto LOCCOMBX |
|  |  | 1. Yes <br> 2. No |  |
| 18F | LOCADMSX | How much did (youlyou or any members of your household) pay? | Goto LOCCOMBX |
| 18F | CHKFCOMB | Are there combined expenses for food/beverages, lodging, transportation, or other things? | 1: Goto LOCCOMBX <br> 2: Goto DIDYOU |
|  |  | 1. Yes <br> 2. No |  |
| 18F | LOCCOMBX | Only those things the respondent could not provide individual expenses for should be combined and entered here. | 1-99999999: Goto FOODLCCM <br> D,R: Goto FOODLCCM |
| 18F | FOODLCCM | Does this include anything for. . . <br> ... Food and beverages? | Goto LODGLCCM |
|  |  | 1. Yes <br> 2. No |  |
| 18F | LODGLCCM | Does this include anything for ... Lodging? | Goto ENTRLCCM |
|  |  | 1. Yes <br> 2. No |  |
| 18F | ENTRLCCM | Does this include anything for . . . Entertainment? | Goto ELSELCCM |
|  |  | 1. Yes |  |

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|  |  | 2. No |  |
| 18F | ELSELCCM | Does this include any . . . | Goto DIDYOU |
|  |  | . . Other expenses? |  |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 18F | DIDYOU | Did (youlyou or any members of your household) have any other stays at local hotels or motels? | 1: Goto NUMLOC, next row |
|  |  | 1. Yes <br> 2. No | 2,DK,RF: Exit block and goto S18F_END |
| 19A | S19A_INTRO | [1] 41-42 ${ }^{\text {2 }}$ | Goto MIS_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. Also, please include any shipping and handling charges with the cost of any item that was shipped

> | Description Amount Month |
| :--- |
| (MISCDESC) $\quad$ (MISCEXPX) (MISCMO) |

1. Enter 1 to Continue

19A

24. Goto MISCDESC
[24 41 ? [F1]
95: Goto MIS_ITEM - next line of grid
Since the first of (reference month), have (youlyou or any members of your household) had expenses for any of the
following, either for (youlyour household) or for someone outside your household?

- Read each item on list.

SCREEN 2 $\qquad$
畘 42 ? [F1]

Have (youlyou or any members of your household) had expenses for --

- Read each item on list.

Do not include pet food. It is a Diary-only item.

1. Fresh flowers or potted plants?
2. Professional photography?
3. Services of lawyers or other legal professionals?
4. Accounting fees?
5. Occupational expenses, such as union dues or professional licenses?
6. Gardening or lawn care services?
7. Housekeeping services?
8. Home security system service fees?
9. Other home services or small repair jobs around the house, not previously reported?
10. Moving, storage, or freight?
11. Stamp or coin collecting?
12. Lotteries or games of chance?
13. Babysitting, nanny services, or other child care inside or outside of your home?
14. Toys or games?
15. Arts or crafts kits?
16. Sewing, knitting, or quilting materials and items?
17. Purchase of pets, pet supplies, or medicine for pets?
18. Pet services?
19. Veterinarian expenses for pets?
20. Catering?
21. Arrangement of live entertainment for special occasions?
22. Rental of party supplies?
23. Purchase or upkeep of cemetery lots or vaults?
24. Funerals, burials, or cremation?
25. Continue List
26. None/No more entries
27. Delete the line


19A MISCMO

## In what month did you have this expense?

(* Enter 13 for same amount each month of the reference period)

| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | Description Amount Month (MISCDESC) $\quad$ (MISCEXPX) (MISCMO) |  |
|  |  | 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 |  |
| 19A | MISCGFTC | Was this expense for someone inside or outside your household? | Goto MISCEXPX |
|  |  | 1. For household <br> 2. For someone outside your household |  |
| 19A | MISCEXPX | (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./ ) | IF ITEM = 14-24 then goto S19ACM_S ELSE goto MISCMORE |
|  |  | Description Amount Month <br> (MISCDESC) (MISCEXPX) (MISCMO) |  |
| 19A | S19ACM_S | - Enter a 'C' for a combined expense. | C: Goto S19ACMB |
|  |  |  | EMPTY: Goto MISCMORE |
| 19A | S19ACMB | [14 42 ? [F1] | Goto MISCMORE |
|  |  | What other expense is the (description) combined with? <br> Enter all that apply, separate with commas. <br> Description Amount Month <br> (MISCDESC) (MISCEXPX) (MISCMO) |  |



[^5]
Since the first of (reference month), have (youlyou or any members of your household) paid any of the following ...

- Read each item on list

SCREEN 3
Since the first of (reference month), have (youlyou or any members of your household) given any money by cash, checks,
money orders, or credit cards to benefit . . .

## - Read each item on lis

## SCREEN

## Since the first of (reference month), have (youlyou or any members of your household) given any ...

- Read item on list

1. College students living away from home?
2. Any other people not in your household, such as friends, co-workers, or homeless persons?
3. Child support?
4. Alimony?
5. Educational institutions?
6. Political organizations?
7. Religious organizations, including churches, temples and mosques?
8. Charities or other organizations?
9. Stocks, bonds, or mutual funds to persons or organizations outside of your household?
10. Continue list
11. None/No more entries
12. Delete the line

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| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
| 19B | CONTDESC | What was the (payment/contribution) for? | Goto CONTMO |
|  |  | Description Month Amount (CONTDESC) (CONTMO) (CONTEXPX) |  |
| 19B | CONTMO | In what month did you make the (payment/contribution)? | Goto CONTEXPX |
|  |  | - Enter 13 for same (payment/contribution) each month of the reference period. |  |
|  |  | $\frac{\text { Description Month Amount }}{\text { (CONTDESC) (CONTMO) (CONTEXPX) }}$ |  |
|  |  | 1. January |  |
|  |  | 2. February |  |
|  |  | 3. March |  |
|  |  | 4. April |  |
|  |  | 5. May |  |
|  |  | 6. June |  |
|  |  | 7. July |  |
|  |  | 8. August |  |
|  |  | 9. September |  |
|  |  | 10. October |  |
|  |  | 11. November |  |
|  |  | 12. December |  |
|  |  | 13. Same amount each month. |  |
| 19B | CONTEXPX | (What was the total amount of the (payment/contribution)./What is the monthly (payment/contribution).) | Goto CONTMORE |
|  |  | Description Month Amount (CONTDESC) (CONTMO) (CONTEXPX) |  |
| 19B | CONTMORE | Did you make any other (payment/contribution). | 1: IF Row number = 43 then goto ERR_MAX ELSE goto CNT_ITEM, next line in grid |
|  |  | Description Month Amount |  |
|  |  | (CONTDESC) (CONTMO) (CONTEXPX) | 2,DK,RF: IF Row number = 43 then goto S19B_END ELSE goto CNT_ITEM, next line in grid |
|  |  | 1. Yes |  |
|  |  | 2. No |  |
| 20A | GROCWEKX | 44 | 0,DK,RF: Goto OTHSTOR |
|  |  | Now I am going to ask about expenses for food, beverages and other items (youlyour household) (have/has) purchased since the first of (reference month). | 1-9999: Goto OTHSTUFX |

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|  |  | What has been (youlyour household) usual WEEKLY expense for grocery shopping? <br> - Include grocery home delivery service fees and drinking water delivery fees. |  |
| :---: | :---: | :---: | :---: |
| 20A | OTHSTUFX | About how much of this amount was for nonfood items, such as paper products, detergents, home cleaning supplies, pet foods, and alcoholic beverages? | Goto OTHSTOR |
| 20A | OTHSTOR | 44 | 1: Goto OSTORWKX |
|  |  | Other than your regular grocery shopping already reported, have (youlyou or any members of your household) purchased any food or nonalcoholic beverages from places such as grocery stores, convenience stores, specialty stores, home delivery, or farmer's markets? | 2,DK,RF: Goto DINE_WKX |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 20A | OSTORWKX | What was your usual WEEKLY expense at these places? | Goto DINE_WKX |
| 20A | DINE_WKX | 44 | Goto CIGARETT |
|  |  | What has been (youlyour household) 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./ ) |  |
| 20A | CIGARETT | ETH 44 | 1: Goto CIGARETX |
|  |  | Since the first of (reference month), have (youlyou or any members of your household) purchased cigarettes? | 2,DK,RF: Goto OTHTOBAC |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 20A | CIGARETX | What is the usual WEEKLY expense for cigarettes? | Goto OTHTOBAC |
| 20A | OTHTOBAC | [E] 44 ? [F1] | 1: Goto OTHTBACX |
|  |  | Have (youlyou or any members of your household) purchased other tobacco products such as cigars, pipe tobacco, or chewing tobacco? | 2,DK,RF: Goto ALC_HOMX |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 20A | OTHTBACX | 44 ? [F1] | Goto ALC_HOMX |
|  |  | What is the usual WEEKLY expense? |  |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
| 20A | ALC_HOMX | What has been (youlyour household) usual MONTHLY expense for alcohol, including beer and wine to be served at home? | Goto ALC_OUTX |
| 20A | ALC_OUTX | What has been your usual MONTHLY expense for alcohol, including beer and wine at restaurants, bars and recreational events? | IF any "active" CU member has AGE It 22 then goto ANYMEALS <br> ELSE goto S20A_END |
| 20A | ANYMEALS | 44 | 1: Goto FBPERSN |
|  |  | Since the first of (reference month), not including (current month), have (youlyou or any members of your household) purchased any meals at school for preschool through high school age children? | 2,DK,RF: Goto 20A_END |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 20A | FBPERSON | What are the names of all household members who purchased meals at school? | 1-30: Goto TbISCHMEAL |
|  |  | - Enter line numbers for all that apply, separate with commas. | DK,RF: Goto 20A_END |
|  |  | 1. Person 1 |  |
|  |  | 2. Person 2 |  |
|  |  | 3. Person 3 |  |
|  |  | 4. Person 4 |  |
|  |  | 5. Person 5 |  |
|  |  | 6. Person 6 |  |
|  |  | 7. Person 7 |  |
|  |  | 8. Person 8 |  |
|  |  | 9. Person 9 |  |
|  |  | 10. Person 10 |  |
|  |  | 11. Person 11 |  |
|  |  | 12. Person 12 |  |
|  |  | 13. Person 13 |  |
|  |  | 14. Person 14 |  |
|  |  | 15. Person 15 |  |
|  |  | 16. Person 16 |  |
|  |  | 17. Person 17 |  |
|  |  | 18. Person 18 |  |
|  |  | 19. Person 19 |  |
|  |  | 20. Person 20 |  |
|  |  | 21. Person 21 |  |
|  |  | 22. Person 22 |  |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 23. Person 23 |  |
|  |  | 24. Person 24 |  |
|  |  | 25. Person 25 |  |
|  |  | 26. Person 26 |  |
|  |  | 27. Person 27 |  |
|  |  | 28. Person 28 |  |
|  |  | 29. Person 29 |  |
|  |  | 30. Person 30 |  |
| 20A | SCHLMLX | Since the first of (reference month), not including (current month), what has been the usual expense for the meals ^NAME purchased at school? | Goto SCHMLPD |
|  |  | - Select time period on the next screen. |  |
| 20A | SCHLMLPD | - Specify time period | 1: Goto SCHMLWKQ |
|  |  | 1. Day | 2: Goto SCHMLWKQ |
|  |  | 2. Week |  |
|  |  | 3. Two Weeks | 3: Goto SCHMLWKQ |
|  |  | 4. Month <br> 5. Other, specify | 4: Goto SCHMLWKQ |
|  |  | O |  |
|  |  |  | 5: Goto SCHLMLSP |
|  |  |  | DK,RF: Goto SCHMLWKQ |
| 20A | SCHLMSP | - Specify: | Goto SCHMLWKQ |
| 20A | SCHMLWKQ | How many WEEKS did ^NAME purchase meals? | IF no more persons then goto S20_END ELSE goto SCHLMLX for next person |
| 20B | LNDROMAT | [4] 44 ? [F1] | 1: Goto LNDRYX |
|  |  | Since the first of (reference month), not including (current month) have (youlyou or any members of your household) had any expenses for self-service laundry machines? | 2,DK,RF: Goto DRYCLEAN |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 20B | LNDRYX | [4] 44 ? [F1] | Goto OTHLNDRY |
|  |  | What was the total cost? |  |
| 20B | OTHLNDRY | 44 ? [F1] | 1: Goto OTHLNDRX |

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|  |  | Was any of this amount for items other than clothes, such as linens or drapes? | 2,DK,RF: Goto DRYCLEAN |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 20B | OTHLNDRX | [1] 44 ? [F1] | Goto DRYCLEAN |
|  |  | How much? |  |
| 20B | DRYCLEAN | EH 44 ? [F1] | 1: Goto DRYCLNX |
|  |  | Have (youlyou or any members of your household) had any expenses for dry cleaning or laundry service? | 2,DK,RF: Goto SALONS |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 20B | DRYCLNX | [14 44 ? [F1] | Goto OTHDRCLN |
|  |  | What was the total cost? |  |
| 20B | OTHDRCLN | 44 ? [F1] | 1: Goto OTHDCLNX |
|  |  | Was any of this amount for items other than clothes, such as linens, drapes, or rugs? | 2,DK,RF: Goto SALONS |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 20B | OTHDCLNX | [14 44 ? [F1] | Goto SALONS |
|  |  | How much? |  |
| 20B | SALONS | [14 44 ? [F1] | 1: Goto SALONX |
|  |  | Since the first of (reference month), not including (current month) have (youlyou or any members of your household) had any expenses for haircutting, styling, attached hair pieces, manicures, massages or other salon services? | 2,DK,RF: Goto WIGS |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 20B | SALONX | [14 44 ? [F1] | Goto WIGS |

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| :---: | :---: | :---: | :---: |
|  |  | What was the total expense for these services since the first of (reference month), not including (current month)? |  |
| 20B | WIGS | [1] 44 ? [F1] | 1: Goto WIGSX |
|  |  | Since the first of (reference month), not including (current month) have (youlyou or any members of your household) had any expenses for removable hairpieces, wigs or toupees? | 2,DK,RF: Goto SAFEDPST |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 20B | WIGSX | [1] 44 ? [F1] | Goto SAFEDPST |
|  |  | What was the total expense for these items since the first of (reference month), not including (current month)? |  |
| 20B | SAFEDPST | [14 44 | 1: Goto SAFDPSTX |
|  |  | Have (youlyou or any members of your household) had any expenses for the rental of a safe deposit box located in a bank or similar financial institution? | 2,DK,RF: Goto BANKSRVC |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 20B | SAFDPSTX | What was the total rental expense for the safe deposit box since the first of (reference month), not including (current month)? | Goto BANKSRVC |
| 20B | BANKSRVC | [E] 44 ? [F1] | 1: Goto BANKMOX |
|  |  | Have (youlyou or any members of your household) paid any charges or fees for bank services such as ATM or overdraft fees or account service charges from a bank or similar financial institution? | 2,DK,RF: Goto TXLIMSRV |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 20B | BANKMOX | [2] 44 ? [F1] | Goto TXLIMSRV |
|  |  | What is the usual MONTHLY charge? |  |
| 20B | TXLIMSRV | [14 44 ? [F1] | 1: Goto TXLIMX |

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| :---: | :---: | :---: | :---: |
|  |  | Since the first of (reference month) not including (current month), have (youlyou or any members of your household) had expenses for taxis or limousine service? Do not include expenses entirely reimbursed for business purposes or expenses incurred on a trip. | 2,DK,RF: Goto MASSTRAN |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 20B | TXLIMX | [54 44 ? [F1] | Goto MASSTRAN |
|  |  | What was the total expense? |  |
| 20B | MASSTRAN | [544 ? [F1] | 1: Goto TRANWRKX |
|  |  | Do (youlyou or any members of your household) 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. <br> Include commuter rail, light rail, and trolleys as mass transit | 2,DK,RF: Goto S20B_END |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 20B | TRANWRKX | [1444 ? [F1] | 1-9999: Goto TRANSUB |
|  |  | What is the usual MONTHLY cost to use mass transit to go to - | 0,DK,RF: Goto TRANSCHX |
|  |  | Work? |  |
| 20B | TRANSUB | Did you receive a transit subsidy? | 1: Goto TRANSUBX |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ | 2,DK,RF: Goto TRANSCHX |
| 20B | TRANSUBX | What is the usual monthly amount? | Goto TRANSCHX |
| 20B | TRANSCHX | What is the usual MONTHLY cost to use mass transit to go to - | Goto TRANOTHX |
|  |  | School? |  |
| 20B | TRANOTHX | What is the usual MONTHLY cost to use mass transit to go to - | Goto S20B_END |
|  |  | Other places? |  |
| 21A | ANYWORK | Since the first of (reference month), did (You/NAME) earn any income from wages or salary? | 1: Goto 21A_INTRO |
|  |  |  | 2,DK,RF: Goto S21A_CHECK |

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| :---: | :---: | :---: | :---: |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 21A | S21A_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. | Goto INCWEEKQ |
|  |  | 1. Enter 1 to Continue |  |
| 21A | INCWEEKQ | (Now I am going to ask about (Your/Name's) work experience and incomel ) | 0: Goto INCNONWK |
|  |  | In the past 12 months, including paid vacation and sick leave, how many weeks did (You/NAME) work? | 1-52,DK,RF: Goto INC_HRSQ |
|  |  | - If household member did not work, enter zero. |  |
| 21A | INC_HRSQ | In the weeks that (You/NAME) worked, how many hours did (you/he/she) usually work per week? | Goto OCCUCODE |
| 21A | OCCUCODE | [4 45 ? [F1] | Goto INCOMEY |
|  |  | Which of the following categories best describes the job in which (You/NAME) received the most earnings during the past 12 months? |  |
|  |  |  |  |
|  |  | 2. Teacher |  |
|  |  | 3. Professional |  |
|  |  | 4. Administrative support, including clerical |  |
|  |  | 5. Sales, retail |  |
|  |  | 6. Sales, business goods and services |  |
|  |  | 7. Technician |  |
|  |  | 8. Protective service |  |
|  |  | 9. Private household service |  |
|  |  | 10. Other service |  |
|  |  | 11. Machine or transportation operator, laborer |  |
|  |  | 12. Construction workers, mechanics |  |
|  |  | 13. Farming |  |
|  |  | 14. Forestry, fishing, groundskeeping <br> 15. Armed Forces |  |
| 21A | INCOMEY | (Were/Was) (You/NAME): | Goto SALARYST |
|  |  | 1. An employee of a PRIVATE company, business, or individual working for wages or salary? <br> 2. A Federal government employee? |  |

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| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 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? |  |
| 21A | INCNONWK | What was the main reason (You/NAME) did not work during the past $\mathbf{1 2}$ months? <br> (Were/Was) (you/he/she) - | Goto SALARYST |
|  |  | 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? |  |
| 21A | SALARYST | ? [F1] | 1: Goto SALARYX |
|  |  | The next few questions are about income DURING THE PAST 12 MONTHS, that is from (Date - one year ago) to (Yesterdays date)... | 2,DK,RF: Goto SEMPFRM |
|  |  | Did (You/NAME) receive any wages, salary, tips, bonuses, or commissions? |  |
|  |  | 1. Yes <br> 2. No |  |
| 21A | SALARYX | ? [F1] | 1-99999999: Goto GROSPAYX |
|  |  | How much did (You/NAME) receive before taxes? | DK,RF: Goto SALARYB |
| 21A | SALARYB | [E] 46 ? [F1] | 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 PAST 12 MONTHS? |  |
|  |  | 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 |  |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 9. \$70,000-\$89,999 |  |
|  |  | 10. \$90,000-\$119,999 |  |
|  |  | 11. \$120,000 and over |  |
| 21A | GROSPAYX | What was the amount of (your/NAME's) last pay before any deductions? | Goto PAYPERD |
| 21A | PAYPERD | What period of time did this cover? | 1: Goto PAYSTUB |
|  |  |  | 2: Goto PAYSTUB |
|  |  | 1. One week |  |
|  |  | 2. Two weeks | 3: Goto PAYSTUB |
|  |  | 3. Month |  |
|  |  | 4. Quarter | 4: Goto PAYSTUB |
|  |  | 5. Year |  |
|  |  | 6. Twice a month | 5: Goto PAYSTUB |
|  |  | 7. Other |  |
|  |  |  | 6: Goto PAYSTUB |
|  |  |  | 7: Goto PAYPRDOT |
|  |  |  | DK,RF: Goto PAYSTUB |
| 21A | PAYPRDOT | - Specify: | Goto PAYSTUB |
| 21A | PAYSTUB | Does the respondent have a paper or electronic pay check record present for (his / her / his/her) last paycheck? | Goto PRIVPENS |
|  |  | 1. Yes <br> 2. No |  |
| 21A | PRIVPENS | Was there any money deducted from (your/NAME's) pay for - | 1: Goto PRIVPENX |
|  |  | Private pension fund? | 2,DK,RF: Goto GOVRET |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 21A | PRIVPENX | How much? | 1-99999999: ELSE goto GOVRET |
|  |  |  | DK,RF: Goto GOVRET |
| 21A | GOVRET | Was there any money deducted from (your/NAME's) pay for - | 1: Goto GOVRETX |
|  |  | Government retirement? | 2,DK,RF: Goto RRRDED |

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| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 2. No |  |
| 21A | GOVRETX | How much? | Goto RRRDED |
| 21A | RRRDED | Was there any money deducted from (your/NAME's) pay for - | 1: Goto RRRDEDX |
|  |  | Railroad retirement? | 2,DK,RF: Goto SSDED |
|  |  | 1. Yes <br> 2. No |  |
| 21A | RRRDEDX | How much? | Goto SSDED |
| 21A | SSDED | Was there any money deducted from (your/NAME's) pay for - | 1: Goto MEDICOV |
|  |  | Social Security including Medicare? | 2,DK,RF: Goto SSNORM |
|  |  | 1. Yes <br> 2. No |  |
| 21A | SSNORM | Are Social Security payments NORMALLY deducted from (your/NAME's) pay? | 1: Goto MEDICOV |
|  |  | 1. Yes <br> 2. No | 2,DK,RF: Goto EMPLCONT |
| 21A | MEDICOV | Does the money deducted for Social Security cover only the Medicare portion of Social Security? | Goto EMPLCONT |
|  |  | 1. Yes <br> 2. No |  |
| 21A | EMPLCONT | Other than Social Security, did any employer or union contribute to (your/NAME's) pension or retirement plan in the past 12 months? | Goto SEMPFRM |
|  |  | 1. Yes <br> 2. No |  |
| 21A | SEMPFRM | ? [F1] <br> DURING THE PAST 12 MONTHS - | 1: Goto SEMPFRMX |
|  |  | Did (You/NAME) receive any self-employment income or have a loss? | 2,DK,RF: Goto SOCSRRET |

[^7] partnerships)

## 1. Yes

2. No

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| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
| 21A | SEMPFRMX | ? [F1] | -999999999-999999999: Goto SOCSRRET |
|  |  | What was the amount? | DK,RF: Goto SEMPFRMB |
|  |  | (Report net income after operating expenses. Include earning as a tenant farmer or sharecropper.) |  |
|  |  | If net income was a loss, precede amount with a '-' Breakeven = 1 |  |
| 21A | SEMPFRMB | [4] 46 ? [F1] | Goto SOCSRRET |
|  |  | Could you tell me which range on CARD A best reflects (your/NAME's) income or loss from self-employment during the PAST 12 MONTHS? |  |
|  |  | 0. Loss |  |
|  |  | 1. \$0-\$4,999 |  |
|  |  | 2. \$5,000-\$9,999 |  |
|  |  | 3. \$10,000-\$14,999 |  |
|  |  | 4. \$15,000-\$19,999 |  |
|  |  | 5. \$20,000-\$29,999 |  |
|  |  | 6. \$30,000-\$39,999 |  |
|  |  | 7. \$40,000-\$49,999 |  |
|  |  | 8. \$50,000-\$69,999 |  |
|  |  | 9. \$70,000-\$89,999 |  |
|  |  | 10. \$90,000-\$119,999 |  |
|  |  | 11. \$120,000 and over |  |
| 21A | SOCSRRET | ? [F1] | 1: Goto RRRETIRX |
|  |  | DURING THE PAST 12 MONTHS - | 2,DK,RF: Goto SUPPLINC |
|  |  | Did (You/NAME) receive any Social Security or Railroad Retirement benefits? |  |
|  |  | 1. Yes <br> 2. No |  |
| 21A | RRRETIRX | ? [F1] | 1-99999999: Goto INCMEDCR |
|  |  | What was the amount of the last Social Security or Railroad Retirement payment received? | DK,RF: Goto RRRETIRB |
| 21A | RRRETIRB | [日f 47 ? [F1] | Goto INCMEDCR |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 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 PAST 12 MONTHS? |  |
|  |  | 1. Less than \$500 |  |
|  |  | 2. \$500-\$699 |  |
|  |  | 3. \$700-\$999 |  |
|  |  | 4. \$1,000-\$1,299 |  |
|  |  | 5. \$1,300-\$1,699 |  |
|  |  | 6. \$1,700 and over |  |
| 21A | INCMEDCR | Is this amount AFTER the deduction for a Medicare premium? | Goto SS_RRQ |
|  |  | 1. Yes |  |
|  |  | 2. No |  |
| 21A | SS_RRQ | During the past 12 months, how many Social Security or Railroad Retirement payments did (YoulNAME) receive? | Goto SUPPLINC |
| 21A | SUPPLINC | ? [F1] | 1: Goto SSIX |
|  |  | DURING THE PAST 12 MONTHS - | 2,DK,RF: Goto INDRETAC |
|  |  | Did (You/NAME) receive any - |  |
|  |  | Supplemental Security Income (SSI) payments? |  |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 21A | SSIX | ? [F1] | 1-99999999: Goto INDRETAC |
|  |  | What was the amount? | DK,RF: Goto SSIB |
| 21A | SSIB | [14 48 ? [F1] | Goto INDRETAC |
|  |  | Could you tell me which range on CARD C best reflects the amount (You/NAME) received in Supplemental Security income during the past 12 months? |  |
|  |  | 1. \$0-\$999 |  |
|  |  | $\begin{aligned} & \text { 2. } \$ 1,000-\$ 1,999 \\ & \text { 3. } \$ 2,000-\$ 2,999 \end{aligned}$ |  |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 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 |  |
| 21A | INDRETAC | DURING THE PAST 12 MONTHS - | 1: Goto INDRETX |
|  |  | Did (You/NAME) place any money in a retirement plan such as an Individual Retirement Account (IRA) or Keogh? Do not include rollovers. | 2,DK,RF: Goto S21A_CHECK |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 21A | INDRETX | How much? | Goto S21A_CHECK |
| 21B | INTERDIV | ? [F1] | 1: Goto INTRDVX |
|  |  | fill for INTERDIV | 2,DK,RF: Goto NETRENT |
|  |  | DURING THE PAST 12 MONTHS - |  |
|  |  | Did (youlyou or any members of your household) receive any interest or dividends? Report even small amounts credited to an account. |  |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \\ & \hline \end{aligned}$ |  |
| 21B | INTRDVX | ? [F1] | 1-99999999: Goto NETRENT |
|  |  | What was the amount? | DK,RF: Goto INTRDVB |
| 21B | INTRDVB | [14 48 ? [F1] | Goto NETRENT |
|  |  | Could you tell me which range on CARD C best reflects the amount (youlyou or any members of your household) received in interest or dividends during the PAST 12 MONTHS? |  |
|  |  | 1. \$0-\$999 |  |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 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 |  |
| 21B | NETRENT | ? [F1] | 1: Goto NETRENTX |
|  |  | DURING THE PAST 12 MONTHS - | 2,DK,RF: Goto ROYEST |
|  |  | Did (youlyou or any members of your household) receive any net rental income or loss?- Net rental income is the total amount after expenses. |  |
|  |  |  |  |
|  |  | 1. Yes |  |
|  |  | 2. No |  |
| 21B | NETRENTX | ? [F1] | -999999999-999999999: Goto ROYEST |
|  |  | What was the amount? | DK,RF: Goto NETRENTB |
|  |  | - The net amount is the total amount after expenses. |  |
|  |  | If income was a loss, precede amount with a '-'. Breakeven = 1 . |  |
| 21B | NETRENTB | [14 48 ? [F1] | Goto ROYEST |
|  |  | Could you tell me which range on CARD C best reflects the total net rental income or loss during the PAST 12 MONTHS? |  |
|  |  | 0. Loss |  |
|  |  | 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 |  |

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| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 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 |  |
| 21B | ROYEST | ? [F1] | 1: Goto ROYESTX |
|  |  | DURING THE PAST 12 MONTHS - | 2,DK,RF: Goto RETSURV |
|  |  | Did (youlyou or any members of your household) receive any royalty income or income from estates and trusts? |  |
|  |  | 1. Yes |  |
|  |  | 2. No |  |
| 21B | ROYESTX | ? [F1] | 1-99999999: Goto RETSURV |
|  |  | What was the amount? | DK,RF: Goto ROYESTB |
| 21B | ROYESTB | [E] 48 ? [F1] | Goto RETSURV |
|  |  | Could you tell me which range on CARD C best reflects the total amount received in royalty income or income from estates and trusts during the PAST 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 |  |
| 21B | RETSURV | ? [F1] | 1: Goto RETSURVX |
|  |  | DURING THE PAST 12 MONTHS - | 2,DK,RF: Goto OTHREG |

Did (youlyou or any members of your household) receive any retirement, survivor, or disability pensions?

| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 1. Yes |  |
|  |  | 2. No |  |
| 21B | RETSURVX | ? [F1] | 1-99999999: Goto OTHREG |
|  |  | What was the amount? | DK,RF: Goto RETSURVB |
|  |  | (Do not include Social Security.) |  |
| 21B | RETSURVB | [E] 48 ? [F1] | Goto OTHREG |
|  |  | Could you tell me which range on CARD C best reflects the total amount received in retirement, survivor, or disability pensions during the PAST 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 |  |
| 21B | OTHREG | ? [F1] | 1: Goto OTHREGX |
|  |  | DURING THE PAST 12 MONTHS - | 2,DK,RF: Goto LUMPSUM |
|  |  | Did (youlyou or any members of your household) receive income on a REGULAR basis from any other source such as Veteran's Administration (VA) payments, unemployment compensation, child support, or alimony? |  |
|  |  | 1. Yes |  |
|  |  | 2. No |  |
| 21B | OTHREGX | ? [F1] | 1-99999999: Goto LUMPSUM |
|  |  | What was the amount from all sources? | DK,RF: Goto OTHREGB |
|  |  | (Do not include lump sum payments such as money from an inheritance or sale of a home.) |  |
| 21B | OTHREGB | [E] 48 ? [F1] | Goto LUMPSUM |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | Could you tell me which range on CARD C best reflects the total amount received in Veteran's Administration (VA) payments, unemployment compensation, child support, or alimony during the PAST 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 |  |
| 21B | LUMPSUM | ? [F1] | 1: Goto LUMPSUMX |
|  |  | DURING THE PAST 12 MONTHS - | 2,DK,RF: Goto OTHERINC |
|  |  | Did (youlyou or any members of your household) receive any lump sum payments from insurance, estates, trusts, royalties, child support, alimony, prizes or games of chance, or from persons outside your household? |  |
|  |  | 1. Yes |  |
|  |  | 2. No |  |
| 21B | LUMPSUMX | ? [F1] | 1-99999999: Goto OTHERINC |
|  |  | What was the total amount received (by all household members/ )? | DK,RF: Goto LUMPSUMB |
| 21B | LUMPSUMB | [d 48 ? [F1] | Goto OTHERINC |
|  |  | Could you tell me which range on CARD C best reflects the total lump sum payments during the PAST 12 MONTHS? |  |
|  |  | 1. \$0-\$999 |  |
|  |  | 2. \$1,000-\$1,999 |  |
|  |  | 3. \$2,000-\$2,999 |  |
|  |  | 4. \$3,000-\$3,999 |  |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 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 |  |
| 21B | OTHERINC | ? [F1] | 1: Goto OTHRINCX |
|  |  | DURING THE PAST 12 MONTHS - | 2,DK,RF: Goto EITC |
|  |  | Did (youlyou or any members of your household) receive any other money income, including money received from cash scholarship and fellowships, stipends not based on working, or from the care of foster children, not already reported? |  |
|  |  | 1. Yes |  |
|  |  | 2. No |  |
| 21B | OTHRINCX | ? [F1] | 1-99999999: Goto EITC |
|  |  | What was the total amount received (by all household members/ )? | DK,RF: Goto OTHRINCB |
| 21B | OTHRINCB | [1] 48 ? [F1] | Goto EITC |
|  |  | Could you tell me which range on CARD C best reflects the total amount of other money income received during the PAST 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 |  |
| 21B | EITC | ? [F1] | Goto MISCTAX |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | The Earned Income Tax Credit is a benefit for certain people who work and have low to moderate wages. A tax credit means more money in your pocket. It reduces the amount of tax you owe and may also give you a refund. |  |
|  |  | During the past 12 months, did (youlyou or any members of your household) claim an Earned Income Tax Credit on your federal income tax return? |  |
|  |  | 1. Yes |  |
|  |  | 2. No |  |
| 21B | MISCTAX | DURING THE PAST 12 MONTHS - | 1: Goto MISCTAXX |
|  |  | Did (youlyou or any members of your household) PAY any inheritance or estate tax? | 2,DK,RF: Goto FOODSMP |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 21B | MISCTAXX | What was the total amount PAID (by all household membersl )? | Goto FOODSMP |
| 21B | FOODSMP | DURING THE PAST 12 MONTHS - | 1: Goto FS_MTHI |
|  |  | Did anyone in this household receive Food Stamps or a Food Stamp benefit card? Include government benefits from the Supplemental Nutritional Assistance Program (SNAP). Do NOT include WIC or the National School Lunch Program. | 2,DK,RF: Goto WELFARE |
|  |  | 1. Yes <br> 2. No |  |
| 21B | FS_MTHI | In how many of the past 12 months were food stamps or EBTs received? | Goto FS_AMT |
| 21B | FS_AMT | What was the dollar value of the last food stamps or EBT received? | Goto WELFARE |
| 21B | WELFARE | ? [F1] | 1: Goto WELFAREX |
|  |  | DURING THE PAST 12 MONTHS - | 2,DK,RF: Goto MEALSPAY |

Did (youlyou or any members of this household, including children,) receive any welfare payments or cash assistance from the state or local welfare office?

Please include even if only for one month. Do NOT include benefits from food, energy, or rental assistance programs.

1. Yes

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| :---: | :---: | :---: | :---: |
|  |  | 2. No |  |
| 21B | WELFAREX | ? [F1] | 1-99999999: Goto MEALSPAY |
|  |  | What was the amount for the PAST 12 MONTHS? | DK,RF: Goto WELFAREB |
| 21B | WELFAREB | [E] 48 ? [F1] | Goto MEALSPAY |
|  |  | 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 PAST 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 |  |
| 21B | MEALSPAY | DURING THE PAST 12 MONTHS - | 1: Goto MLPAYWKX |
|  |  | Have (youlyou or any members of your household) received any free meals at work as part of your pay? | 2,DK,RF: Goto S21B_END |
|  |  | 1. Yes 2. No |  |
| 21B | MLPAYWKX | About what was the WEEKLY dollar value of these meals? | Goto MLPYQWKS |
| 21B | MLPYQWKS | How many weeks did (youlyou or any members of your household) receive such meals during the past 12 months? | Goto S21B_END |
| 22 | LIAINTRO | The next few questions are about financial assets, credit, and loans. We know people aren't used to discussing their debt and financial assets, but we use this information to get a picture of how spending relates to changes in debt and savings. Be assured that, like all other information you have provided, these answers will be kept strictly confidential. | Goto IRAX |
|  |  | 1. Enter 1 to Continue |  |
| 22 | IRAX | ? [F1] | 0-999999999999: Goto IRAYRX |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | As of TODAY -- | DK,RF: Goto IRAB |
|  |  | What is the total value of all retirement accounts such as 401(k)s, IRAs, Thrift Savings Plans that (youlyour household) (own/owns)? |  |
|  |  | - If no retirement accounts, enter 0 |  |
| 22 | IRAB | [14 49 ? [F1] | 1-6: Goto IRAYRX |
|  |  | Could you tell me which range on CARD D best reflects the total value of all retirement accounts such as 401(k)s, IRAs, and Thrift Savings Plans? | DK,RF: Goto DEFBENRP |
|  |  | 1. \$0-\$1,999 |  |
|  |  | 2. \$2,000-\$9,999 |  |
|  |  | 3. \$10,000-\$49,999 |  |
|  |  | 4. \$50,000-\$199,999 |  |
|  |  | 5. \$200,000-\$449,999 |  |
|  |  | 6. \$450,000 and over |  |
| 22 | IRAYRX | ? [F1] | 0-999999999999: Goto DEFBENRP |
|  |  | What was the total value of all retirement accounts ONE YEAR AGO TODAY? | DK,RF: Goto IRAYRB |
| 22 | IRAYRB | [E4 49 ? [F1] | Goto DEFBENRP |
|  |  | Could you tell me which range on CARD D best reflects the total value of all retirement accounts ONE YEAR AGO TODAY? |  |
|  |  | 1. \$0-\$1,999 |  |
|  |  | 2. \$2,000-\$9,999 |  |
|  |  |  |  |
|  |  | 4. $\$ 50,000-\$ 199,999$ |  |
|  |  | 5. \$200,000-\$449,999 |  |
|  |  | 6. \$450,000 and over |  |
| 22 | DEFBENRP | ? [F1] | Goto STOCK |
|  |  | Do (youlyou or any members of your household) have a defined benefit retirement plan, such as a pension from an employer? |  |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 22 | STOCK | ? [F1] | 1: Goto STOCKX |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | Do (youlyou or any members of your household) have any directly-held stocks, bonds, or mutual funds (Not in Retirement accountsl )? <br> Include U.S. savings bonds | 2,DK,RF: Goto LIQUIDX |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| 22 | STOCKX | ? [F1] | 1-999999999999: Goto STOCKYRX |
|  |  | As of TODAY -- | DK,RF: Goto STOCKB |
|  |  | What is the total value of all directly-held stocks, bonds, and mutual funds (Not in Retirement accounts/ ) that (youlyour household) (own/owns)? |  |
|  |  | - Include US savings bonds |  |
| 22 | STOCKB | [E4 49 ? [F1] | 1-6: Goto STOCKYRX |
|  |  | Could you tell me which range on CARD D best reflects the total value of all directly-held stocks, bonds, and mutual funds (Not in Retirement accountsl )? | DK,RF: Goto LIQUIDX |
|  |  | - Include US savings bonds |  |
|  |  | 1. \$0-\$1,999 |  |
|  |  | 2. \$2,000-\$9,999 |  |
|  |  | 3. \$10,000-\$49,999 |  |
|  |  | 4. \$50,000-\$199,999 |  |
|  |  | 5. \$200,000-\$449,999 |  |
|  |  | 6. \$450,000 and over |  |
| 22 | STOCKYRX | ? [F1] | 0-999999999999: Goto LIQUIDX |
|  |  | What was the total value of all directly-held stocks, bonds, and mutual funds (Not in Retirement accountsl ) ONE YEAR AGO TODAY? | DK,RF: Goto STOCKYRB |
|  |  | - Include US savings bonds |  |
| 22 | STOCKYRB | [E] 49 ? [F1] | Goto LIQUIDX |
|  |  | Could you tell me which range on CARD D best reflects the total value of all directly-held stocks, bonds, and mutual funds (Not in Retirement accountsl ) ONE YEAR AGO TODAY? |  |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | * Include US savings bonds |  |
|  |  | 1. \$0-\$1,999 |  |
|  |  | 2. \$2,000-\$9,999 |  |
|  |  | 3. \$10,000-\$49,999 |  |
|  |  | 4. \$50,000-\$199,999 |  |
|  |  | 5. \$200,000-\$449,999 |  |
|  |  | 6. \$450,000 and over |  |
| 22 | LIQUIDX | ? [F1] | 0-999999999999: Goto LIQUDYRX |
|  |  | As of TODAY -- | DK, RF: Goto LIQUIDB |
|  |  | What is the total value of all checking, savings, money market accounts, and certificates of deposit or CDs (youlyour household) (have/has)? |  |
| 22 | LIQUIDB | [E] 50 ? [F1] | 1-6: Goto LIQUDYRX |
|  |  | Could you tell me which range on CARD E best reflects the total value of checking, savings, money market accounts, and certificates of deposit or CDs? | DK, RF: Goto WHOLIF |
|  |  | 1. \$0-\$499 |  |
|  |  | 2. \$500-\$999 |  |
|  |  | 3. \$1,000-\$2,499 |  |
|  |  | 4. \$2,500-\$9,999 |  |
|  |  | 5. \$10,000-\$34,999 |  |
|  |  | 6. \$35,000 and over |  |
| 22 | LIQUDYRX | ? [F1] | 0-999999999999: Goto WHOLIF |
|  |  | What was the total value of all checking, savings, money market accounts, and certificates of deposit or CDs ONE YEAR AGO TODAY? | DK, RF: Goto LIQUDYRB |
| 22 | LIQUDYRB | [15 50 ? [F1] | Goto WHOLIF |

Could you tell me which range on CARD E best reflects the total value of all checking, savings, money market accounts, and certificates of deposit or CDs ONE YEAR AGO TODAY?

1. \$0-\$499
2. \$500-\$999
3. \$1,000-\$2,499
4. $\$ 2,500-\$ 9,999$
5. \$10,000-\$34,999

| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 6. \$35,000 and over |  |
| 22 | WHOLIF | ? [F1] | 1: Goto WHOLIFX |
|  |  | (Do/Does) (youlyour household) own any whole life insurance or other life insurance policies that can be surrendered for cash or borrowed against prior to the death of the person insured? | 2,DK,RF: Goto OTHAST |
|  |  | - Also include universal life and variable life insurance <br> - Do NOT include term life insurance or other policies that only have a benefit upon death or disability |  |
|  |  | 1. Yes |  |
|  |  | 2. No |  |
| 22 | WHOLIFX | ? [F1] | 1-999999999999: Goto WHLFYRX |
|  |  | As of TODAY -- | DK,RF: Goto WHOLIFB |
|  |  | What is the total surrender value of these policies? |  |
|  |  | - Surrender value is also known as the cash value |  |
|  |  | Enter the amount that can be borrowed or withdrawn prior to death, NOT the benefit upon death of the insured |  |
| 22 | WHOLIFB | [EA 50 ? [F1] | 1-6: Goto WHLFYRX |
|  |  | Could you tell me which range on CARD E best reflects the total surrender value of these policies? | DK,RF: Goto OTHAST |
|  |  | Surrender value is also known as the cash value <br> Enter the amount that can be borrowed or withdrawn prior to death, NOT the benefit upon death of the insured |  |
|  |  | 1. \$0-\$499 |  |
|  |  | 2. \$500-\$999 |  |
|  |  | 3. \$1,000-\$2,499 |  |
|  |  | 4. \$2,500-\$9,999 |  |
|  |  | 5. \$10,000-\$34,999 |  |
|  |  | 6. \$35,000 and over |  |
| 22 | WHLFYRX | ? [F1] | 0-999999999999: Goto OTHAST |
|  |  | What was the total surrender value of these policies ONE YEAR AGO TODAY? | DK,RF: Goto WHLFYRB |

[^8]| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | Enter the amount that can be borrowed or withdrawn prior to death, NOT the benefit upon death of the insured |  |
| 22 | WHLFYRB | [EA 50 ? [F1] | Goto OTHAST |
|  |  | Could you tell me which range on CARD E best reflects the total surrender value of these policies ONE YEAR AGO TODAY? |  |
|  |  | Surrender value is also known as the cash value <br> - Enter the amount that can be borrowed or withdrawn prior to death, NOT the benefit upon death of the insured |  |
|  |  | 1. \$0-\$499 |  |
|  |  | 2. \$500-\$999 |  |
|  |  | 3. \$1,000-\$2,499 |  |
|  |  | 4. \$2,500-\$9,999 |  |
|  |  | 5. \$10,000-\$34,999 |  |
|  |  | 6. \$35,000 and over |  |
| 22 | OTHAST | (Do/Does) (youlyour household) have any other financial assets, such as annuities, trusts, and royalties? | 1: Goto OTHASTX |
|  |  |  | 2,DK,RF: Goto CREDIT |
|  |  | 1. Yes |  |
|  |  | 2. No |  |
| 22 | OTHASTX | As of TODAY -- | 1-999999999999: Goto OTHSTYRX |
|  |  | What is the total value of these other financial assets? | DK, RF: Goto OTHASTB |
| 22 | OTHASTB | EH 49 | 1-6: Goto OTHSTYRX |
|  |  | Could you tell me which range on CARD D best reflects the total value of these other financial assets? | DK, RF: Goto CREDIT |
|  |  | 1. \$0-\$1,999 |  |
|  |  | 2. \$2,000-\$9,999 |  |
|  |  | 3. \$10,000-\$49,999 |  |
|  |  | 4. \$50,000-\$199,999 |  |
|  |  | 5. \$200,000-\$449,999 6. $\$ 450,000$ and over |  |
| 22 | OTHSTYRX | What was the total value of these other financial assets ONES YEAR AGO TODAY? | 0-999999999999: Goto CREDIT |
|  |  |  | DK,RF: Goto OTHSTYRB |
| 22 | OTHSTYRB | [14 49 | Goto CREDIT |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | Could you tell me which range on CARD D best reflects the total value of these other financial assets ONE YEAR AGO TODAY? |  |
|  |  | 1. \$0-\$1,999 |  |
|  |  | 2. \$2,000-\$9,999 |  |
|  |  | 3. \$10,000-\$49,999 |  |
|  |  | 4. \$50,000-\$199,999 |  |
|  |  | 5. \$200,000-\$449,999 |  |
|  |  | 6. \$450,000 and over |  |
| 22 | CREDIT | ? [F1] | 1: Goto CREDITX |
|  |  | As of TODAY -- | 2,DK,RF: Goto STUDNT |
|  |  | (Do/Does) (you/your household) have a balance on any major credit cards including store cards and gas cards? |  |
|  |  | 1. Yes |  |
|  |  | 2. No |  |
| 22 | CREDITX | ? [F1] | 1-999999999999: Goto CREDTYRX |
|  |  | What is the total amount owed on all cards? | DK, RF: Goto CREDITB |
| 22 | CREDITB | CH 50 ? [F1] | 1-6: Goto CREDTYRX |
|  |  | Could you tell me which range on CARD E best reflects the total amount owed on all major credit cards including store cards and gas cards? | DK,RF: Goto CREDFINX |
|  |  | 1. \$0-\$499 |  |
|  |  | 2. \$500-\$999 |  |
|  |  | 3. \$1,000-\$2,499 |  |
|  |  | 4. \$2,500-\$9,999 |  |
|  |  | 5. \$10,000-\$34,999 |  |
|  |  | 6. \$35,000 and over |  |
| 22 | CREDTYRX | ? [F1] | 0-999999999999: Goto CREDFINX |
|  |  | What was the total amount owed on all cards ONE YEAR AGO TODAY? | DK, RF: Goto CREDYRB |
| 22 | CREDYRB | [15 50 ? [F1] | Goto CREDFINX |

Could you tell me which range on CARD E best reflects the total amount owed on all major credit cards including store cards and gas cards ONE YEAR AGO TODAY?

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| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 1. \$0-\$499 |  |
|  |  | 2. \$500-\$999 |  |
|  |  | 3. \$1,000-\$2,499 |  |
|  |  | 4. \$2,500-\$9,999 |  |
|  |  | 5. \$10,000-\$34,999 |  |
|  |  | 6. \$35,000 and over |  |
| 22 | CREDFINX | What was the total amount paid in finance, late charges, and interest for all cards in (last month)? | Goto STUDNT |
| 22 | STUDNT | ? [F1] | 1: Goto STUDNTX |
|  |  | As of TODAY -- | 2, DK, RF: Goto OTHLOAN |
|  |  | (Do/Does) (youlyour household) have any student loans? |  |
|  |  | 1. Yes |  |
|  |  | 2. No |  |
| 22 | STUDNTX | ? [F1] | 1-999999999999: Goto STDNTYRX |
|  |  | What is the total amount owed on all student loans? | DK, RF: Goto STUDNTB |
| 22 | STUDNTB | [15 50 ? [F1] | 1-6: Goto STDNTYRX |
|  |  | Could you tell me which range on CARD E best reflects the total amount owed on all student loans? | DK, RF: Goto STUDFINX |
|  |  | 1. \$0-\$499 |  |
|  |  | 2. \$500-\$999 |  |
|  |  | 3. \$1,000-\$2,499 |  |
|  |  | 4. \$2,500-\$9,999 |  |
|  |  | 5. \$10,000-\$34,999 |  |
|  |  | 6. \$35,000 and over |  |
| 22 | STDNTYRX | ? [F1] | 0-999999999999: Goto STUDFINX |
|  |  | What was the total amount owed on all student loans ONE YEAR AGO TODAY? | DK, RF: Goto STDNTYRB |
| 22 | STDNTYRB | [15 50 ? [F1] | Goto STUDFINX |
|  |  | Could you tell me which range on CARD E best reflects the total amount owed on all student loans ONE YEAR AGO TODAY? |  |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 1. \$0-\$499 <br> 2. \$500-\$999 <br> 3. $\$ 1,000-\$ 2,499$ <br> 4. $\$ 2,500-\$ 9,999$ <br> 5. \$10,000-\$34,999 <br> 6. \$35,000 and over |  |
| 22 | STUDFINX | What was the total amount paid in finance, late charges, and interest for all student loans in (last month)? | Goto OTHLOAN |
| 22 | OTHLOAN | ? [F1] <br> As of TODAY -- <br> (Do/Does) (youlyour household) have any other debt such as medical loans or personal loans? <br> Do not include mortgages, home equity loans, or vehicle loans <br> 1. Yes <br> 2. No | 1: Goto OTHLONX <br> 2,DK,RF: Goto S22_END |
| 22 | OTHLONX | $?[F 1]$ <br> What is the total amount owed on all other loans? <br> Do not include mortgages, home equity loans, or vehicle loans | 1-999999999999: Goto OTHLNYRX DK,RF: Goto OTHLONB |
| 22 | OTHLONB | [E] 50 ? [F1] <br> Could you tell me which range on CARD E best reflects the total amount owed on all other loans? <br> Do not include mortgages, home equity loans, or vehicle loans <br> 1. \$0-\$499 <br> 2. \$500-\$999 <br> 3. $\$ 1,000-\$ 2,499$ <br> 4. $\$ 2,500-\$ 9,999$ <br> 5. $\$ 10,000-\$ 34,999$ <br> 6. \$35,000 and over | 1-6: Goto OTHLNYRX DK,RF: Goto OTHFINX |
| 22 | OTHLNYRX | ? [F1] | 0-999999999999: Goto OTHFINX |



1. ^NAME[1]
2. ^NAME[2]
3. ^NAME[3]
4. ^NAME[4]

| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 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 |  |
| BACK | 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 <br> B: Goto DONE <br> RF: IF outcome $=202$ then goto CBREF ELSE goto VERIFY_INFO |
| BACK | 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 | Goto VERIFY_INFO |
| BACK | THANKCB | Thank you. <br> I will come back at the time suggested | Goto VERIFY_INFO |


| Section $\quad$ CAPI Variable Name | Question Text |
| :--- | :--- |
|  | Revisit (Appointment information) |


| 1. Enter 1 to Continue |  |  |  |
| :---: | :---: | :---: | :---: |
| BACK | CARDPIN | The letter we mailed you indicated that we would provide you with the PIN number for the debit card upon completion of the interview. Since we have now completed the interview, I can inform you that the PIN number is the last 4 digits of the card number. <br> 1. Enter 1 to Continue | IF RT25.QTYPE = 1 or 2 then goto R_USE ELSE goto DK_CHECK |
| BACK | R_USE | Did the respondent(s) refer to at least one record or receipt - either paper or digital - during the interview? <br> 1. Yes <br> 2. No | 1: Goto CARDNAME <br> 2: Goto DK_CHECK |
| BACK | CARDNAME | The letter we mailed you indicated that you would receive an additional \$20 debit card for using any records during this interview. We will mail this debit card to (youlyour household) within the next month. Who would you like this addressed to? | Goto DK_CHECK |
| BACK | 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 THANKYOU |
|  |  | 1. Yes <br> 2. No |  |
| BACK | 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? <br> - Today is (current date) <br> - DK Items: Press Ctrl-M to review all Don't Knows | Goto DK_THANK |
| BACK | DK_THANK | Thank you. <br> I will come back at the time suggested. <br> - Revisit: (Appointment information) <br> 1. Enter 1 to Continue | Goto VERIFY_INFO |
| BACK | THANKYOU | This concludes the interview. Thank you for your patience, and for taking the time to answer our questions. | IF (RT25.DESIGN = 00 and INTNMBR =1-4) or (RT25.DESIGN $=10$ and INTNMBR $=1-3$ ) then goto QTRAPPT <br> ELSE goto HOW_INTV |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 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. |  |
|  |  | That is why we sincerely appreciate your participation in this survey (and look forward to your continued support when we contact you again in 3 months.) |  |
|  |  | - Interview number: (1/2/3/4/5) <br> - NOTE: Inform the respondent that a supervisor may call them to conduct re-interview. Explain re-interview as needed. |  |
|  |  | 1. Enter 1 to Continue |  |
| BACK | QTRAPPT | Today is (current date). I would like to return during the first week of (month) to conduct your next interview. What day and time works best with your schedule? <br> Enter date and time of the next quarter appointment. <br> Give respondent an appointment card with the filled-in date and time with Regional Office or Field Representative contact information. <br> - NOTE : If you are not making an appointment for the next interview, press Enter. | Goto HOW_INTV |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| BACK | THANK2 | Thank you for your time. You've been very helpful. | IF BCNAME ne blank then goto VERIFY_INFO |
|  |  | NOTE: Inform the respondent that a supervisor may call them to conduct re-interview. Explain re-interview as needed. | ELSEIF NONTYP = 1-3 then goto TELPV ELSE goto DONE |
|  |  | - Interview number: $(1 / 2 / 3 / 4 / 5)$ |  |
|  |  | 1. Enter 1 to Continue | 1: Goto MISS_SEC <br> 2: Goto VERIFY_INFO |
| BACK | TRANS | - Are you ready to transmit this case? |  |
|  |  |  |  |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| BACK | MISS_SEC | No survey data were collected for a required section(s) in a 302 interview. | Goto TELPV |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | Enter the reason that best describes why survey data was not collected. |  |
| BACK | HOW_INTV | How did you collect the data for this (first/second/third/fourth/fifth) interview for this household? | 1,6: Goto SNGL_INT |
|  |  | 1. Personal visit for all sections | 2: Goto TEL_RESN |
|  |  | 2. Personal visit for all sections, but telephone followup for some questions | 3,4,5: Goto TEL_SECT |
|  |  | 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 <br> 6. Telephone for all sections |  |
| BACK | SNGL_INT | - Were you able to conduct the interview in a single (visit/call)? | IF HOW_INTV = 6 then goto TEL_RESN ELSE goto CONVREF |
|  |  | $\begin{aligned} & \text { 1. Yes } \\ & \text { 2. No } \end{aligned}$ |  |
| BACK | TEL_SECT | * Which of these sections did you collect entirely by telephone? | Goto TEL_RSN |

Enter all that apply, separate with commas.
Do not select 6 or 7 if any part of the section was collected in person.

1. Sections 2 and 3 Housing - rent, mortgage, home equity loans.
2. Section 4 Utilities/Communications (electricity, heating, telephone, cable, internet)
3. Section 6 Appliances
4. Section 8 Home Furnishings
5. Section 9 Clothing
6. Sections 10, 11, and 12 Vehicle Expenses
7. Sections 13 and 14 Insurance
8. Section 15 Medical/Health Expenses
9. Section 18 Trips and Vacations
10. Section 21 Work Experience and Income

- What was the main reason for collecting data by telephone?

1. Barriers to reaching the sample unit (i.e., doorman, security, dog).
2. Collecting data from additional respondent(s) in household
3. Excessive distance or travel time to sample unit.
4. Respondent called FR to do interview.
5. Respondent only available by telephone (scheduling issues).

| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 6. Respondent refused personal visit. |  |
|  |  | 7. Respondent requested telephone interview. |  |
|  |  | 8. Other (Specify). |  |
| BACK | OTHTLRSN | - Specify | Goto CONVREF |
| BACK | TELPV | How did you collect MOST of the data for this case? |  |
|  |  | (Include follow-ups) | 1 AND <br> NOCONTACT $=0$ then goto RESPON |
|  |  | 1. By personal visit | ELSE goto DON |
|  |  | 2. By phone | ELSE goto Do |
| BACK | CONVREF | ? [F1] | Goto RESPON |
|  |  | - Was this a converted refusal? |  |
|  |  | 1. Yes |  |
|  |  | 2. No |  |
| BACK | RESPON | - Enter the line number of the MAIN respondent. | Goto OTHRSP |
|  |  | 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] |  |

# Consumer Expenditure Quarterly Interview Survey July 2016 Specifications 

| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 23. ^NAME[23] |  |
|  |  | 24. ^NAME[24] |  |
|  |  | 25. ^NAME[25] |  |
|  |  | 26. ^NAME[26] |  |
|  |  | 27. ^NAME[27] |  |
|  |  | 28. ^NAME[28] |  |
|  |  | 29. ^NAME[29] |  |
|  |  | 30. ^NAME[30] |  |
|  |  | 95. Proxy Respondent |  |
| BACK | OTHRSP | - Enter the line number of ALL OTHER respondents. | Goto USERECS |
|  |  | Enter 0 For None |  |
|  |  | (Display Names of persons in the household) |  |
|  |  | 0. None |  |
|  |  | 1. ^NAMEonly(1) |  |
|  |  | 2. ^NAMEonly(2) |  |
|  |  | 3. ^NAMEonly(3) |  |
|  |  | 4. ^NAMEonly(4) |  |
|  |  | 5. ^NAMEonly(5) |  |
|  |  | 6. ^NAMEonly(6) |  |
|  |  | 7. ^NAMEonly(7) |  |
|  |  | 8. ^NAMEonly(8) |  |
|  |  | 9. ^NAMEonly(9) |  |
|  |  | 10. ^NAMEonly(10) |  |
|  |  | 11. ^NAMEonly(11) |  |
|  |  | 12. ^NAMEonly(12) |  |
|  |  | 13. ^NAMEonly(13) |  |
|  |  | 14. ^NAMEonly(14) |  |
|  |  | 15. ^NAMEonly(15) |  |
|  |  | 16. ^NAMEonly(16) |  |
|  |  | 17. ^NAMEonly(17) |  |
|  |  | 18. ^NAMEonly(18) |  |
|  |  | 19. ^NAMEonly(19) |  |
|  |  | 20. ^NAMEonly(20) |  |
|  |  | 21. ^NAMEonly(21) |  |
|  |  | 22. ^NAMEonly(22) |  |
|  |  | 23. ^NAMEonly(23) |  |
|  |  | 24. ^NAMEonly(24) |  |
|  |  | 25. ^NAMEonly(25) |  |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 26. ^NAMEonly(26) |  |
|  |  | 27. ^NAMEonly(27) |  |
|  |  | 28. ^NAMEonly(28) |  |
|  |  | 29. ^NAMEonly(29) |  |
|  |  | 30. ^NAMEonly(30) |  |
|  |  | 95. Proxy respondent |  |
| BACK | USERECS | - In this interview, how often did the respondent consult records? | 1-3: Goto TYPERECS |
|  |  |  | 4: Goto HOMEFILE |
|  |  | 1. Always or almost always |  |
|  |  | 2. Most of the time |  |
|  |  | 3. Occasionally or used at least one record |  |
|  |  |  |  |
| BACK | TYPERECS | What types of bills, receipts, or records did the respondent(s) use to answer expenditure questions? | 1-8: Goto RSECTN |
|  |  | Enter all that apply, separate with commas. | 9: Goto SPECRECS |
|  |  | 1. Bills |  |
|  |  | 2. Checkbook ledger or check stubs |  |
|  |  | 3. Personal finance or budgeting software records |  |
|  |  | 4. Receipts or e-mail receipts |  |
|  |  | 5. Home file (provided by Census Bureau) |  |
|  |  | 6. Contracts or agreements |  |
|  |  | 7. Credit card, bank, or online bill-paying statements |  |
|  |  | 8. Pay stub |  |
|  |  | 9. Other- specify |  |
| BACK | SPECRECS | - Specify | Goto RSECTN |
| BACK | RSECTN | Which of these sections did the respondent(s) use bills, receipts, or other resources to answer expenditure questions? <br> Enter all that apply, separate with commas. | Goto HOMEFILE |
|  |  |  |  |
|  |  | 1. Section 1-General Housing Characteristics |  |
|  |  | 2. Section 2 - Rental Living Quarters |  |
|  |  | 3. Sections 3-Owned Living Quarters \& Other Owned Real Estate |  |
|  |  | 4. Section 4 - Utilities and Fuels |  |
|  |  | 5. Section 5 - Construction, Repairs, Alterations, and Maintenance of Property <br> 6. Section 6 - Appliances, Household Equipment, and Other Selected Items |  |


| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
|  |  | 7. Section 7 - Household Item Repairs, Service Contracts, and Extended Warranties <br> 8. Section 8 - Home Furnishings and Related Household Items <br> 9. Section 9 - Clothing and Clothing Services <br> 10. Section 10 - Rented and Leased Vehicles <br> 11. Section 11 - Owned vehicles <br> 12. Section 12 - Vehicle Operating Expenses <br> 13. Section 13 - Insurance Other than Health <br> 14. Section 14 - Health Insurance <br> 15. Section 15 - Medical and Health Expenses <br> 16. Section 16 - Educational Expenses <br> 17. Section 17 - Subscriptions, Memberships, Books, and Entertainment Expenses <br> 18. Section 18 - Trips and Vacations <br> 19. Section 19 - Miscellaneous Expenses <br> 20. Section 20 - Expense Patterns for Selected Goods and Services <br> 21. Section 21 - Work Experience and Income <br> 22. Section 22 - Assets and Liabilities |  |
| BACK | HOMEFILE | Did you give the respondent a Home File this quarter? <br> 1. Yes <br> 2. No | Goto INFOBOOK |
| BACK | INFOBOOK | - In the interview, how often did the respondent consult the information booklet? <br> - If reading the book to the respondent, enter 5 . <br> 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. | Goto LANGUAGE |
| BACK | LANGUAGE | - In what language was the interview conducted? <br> 1. English <br> 2. Spanish <br> 3. Other - specify | 1,2: Goto VERIFY_INFO <br> 3: Goto LANG_SP |
| BACK | LANG_SP | - Specify | Goto VERIFY_INFO |

## Consumer Expenditure Quarterly Interview Survey July 2016 Specifications

| Section | CAPI Variable Name | Question Text | Skip Instructions |
| :---: | :---: | :---: | :---: |
| BACK | VERIFY_INFO |  | 1: Goto DONE |
|  |  | - Verify/change any of the information listed below |  |
|  |  | Telephone number: ((area)) (phone number) (Extension) | 2: Goto V_PHONE |
|  |  | Second phone: (2nd phone number) (2nd phone extension) |  |
|  |  | Best time to call : (Bestime code description) |  |
|  |  | Specific best time: (best time specify) |  |
|  |  | No Sunday: ((No Sunday Interview/Sunday interview okay)) |  |
|  |  | 1. Enter 1 to Continue <br> 2. Change something |  |
| BACK | V_PHONE | What is your telephone number? | Goto V_BSTTI |
|  |  | - Enter 0 for none. |  |
| BACK | V_BSTTI | - Best time to contact | 1-9, Empty: Goto V_BSTTI2 |
|  |  |  | 10: Goto DONE |
|  |  | 1. Morning (9am-12noon) |  |
|  |  | 2. Noon/lunchtime (11am-1pm) |  |
|  |  | 3. Afternoon (12noon-4pm) |  |
|  |  | 4. Suppertime/early evening/dinnertime(4pm-7pm) |  |
|  |  | 5. Evening (6pm-9pm) |  |
|  |  | 6. Anytime (9am-9pm) |  |
|  |  | 7. Late evening/night (7pm-9pm) |  |
|  |  | 8. Daytime (9am-4pm) |  |
|  |  | 9. After 5pm |  |
|  |  | 10. Battery problem |  |
| BACK | V_BSTTI2 | - Enter specific best time to contact | Goto V_NOSUN |
| BACK | V_NOSUN | Would a Sunday interview be acceptable? | Goto DONE |
|  |  | 1. Yes |  |
|  |  | 2. No |  |
|  |  | 3. battery problem |  |


[^0]:    1. Continue
    2. Skip notes
    3. Ready to transmit
[^1]:    (House \#) (House \#)SUF (Street Name) (Unit Designation) (ity), (State) (Zipcode)
    Phy des: (Physical Description)
    GQ unit: (GQ Unit Description)

[^2]:    - Repeat if necessary

[^3]:    1. Long term care insurance?
    2. Life insurance or other policies which provide benefits in case of death or disability?
    3. Homeowners' insurance?
[^4]:    1. PROPDESC[1]
    2. PROPDESC[2]
    3. PROPDESC[3]
    4. PROPDESC[4]
[^5]:    - Read each item on list

[^6]:    1. Yes
[^7]:    (Report income from own businesses (farm or non-farm) including proprietorships and

[^8]:    - Surrender value is also known as the cash value

