# Consumer Expenditure CEQ Survey April 2017 Instrument Requirements

**FRONT Section changes**

| **CEQ Section** | **CEQ CAPI Variable** | **Change Detail** | **201607 Wording/Specification** | **201704 Wording/Specification** |
| --- | --- | --- | --- | --- |
| FRONT | GENINTRO | Remove incentive test changes | * Do not read as worded below   Identify yourself – show ID  ^Genintro  Introduce survey ^Genintro3  The Household address is  ^Rt20hno ^Rt20hnosuf ^Rt20strname  ^Rt20unitdes  Read if necessary:  I am (your name) from the US 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   Skip instructions:  1: **IF (INTNMBR=1 AND QTYPE=1, 2, or 3) goto RECVDEBT**  **ELSE** goto INTROB  2: goto GIVE\_LETTER  3: exit block and goto BCOVERAGE.NONTYP | * Do not read as worded below   Identify yourself – show ID  ^Genintro  Introduce survey ^Genintro3  The Household address is  ^Rt20hno ^Rt20hnosuf ^Rt20strname  ^Rt20unitdes  Read if necessary:  I am (your name) from the US 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   Skip instructions:  1: goto INTROB  2: goto GIVE\_LETTER  3: exit block and goto BCOVERAGE.NONTYP |
| FRONT | GIVE\_LETTER | Remove incentive test changes | * Hand the respondent the letter   Allow time to read   1. Enter 1 to continue   Skip instructions:  **IF (INTNMBR=1 AND QTYPE=1, 2, or 3) goto RECVDEBT**  **ELSE** goto INTROB | * Hand the respondent the letter   Allow time to read   1. Enter 1 to continue   Skip instructions:  goto INTROB |
| FRONT | RECVDEBT | Delete variable | [Fill1: **The letter you received should have included a debit card^Fill5, which is a token of appreciation from the Census Bureau for completing the interview.**’  [Fill2: **You should have also received a debit card^Fill5 as a token of appreciation from the Census Bureau for completing the interview.**]  [Fill3: **Did anyone living at this address receive the debit card?**]  [Fill4: **Did (READ NAMES) receive a debit card?**]  [Display roster for this CU]   1. Yes 2. No   Fill1 instructions:  If GENINTRO=1, fill Fill1 else leave blank.  Fill2 instructions:  If GIVE\_LETTER=1, fill Fill2 else leave blank.  Fill3 instructions:  If case is NOT a spawned CU, fill Fill3 else leave blank.  Fill4 instructions:  If case IS a spawned CU, fill Fill4 else leave blank.  Fill5 instructions:  If QTYPE=1 or 3 fill “ **and a five-dollar bill**” else leave blank.  Display roster fill instructions:  If case IS a spawned CU display roster; else leave blank.  Skip instructions:  1, REF: goto INTROB  2, DK: goto NOTRCV40 | Delete variable |
| FRONT | NOTRCV40 | Delete variable | **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.**   1. Enter 1 to continue   Skip instructions:  goto RCRDNM40 | Delete variable |
| FRONT | RCRDNM40 | Delete variable | **Who would you like the replacement card addressed to?**  Skip instructions:  100 characters, DK, REF: goto INTROB | Delete variable |

**CEINTRO Section changes**

| **CEQ Section** | **CEQ CAPI Variable** | **Change Detail** | **201607 Wording/Specification** | **201704 Wording/Specification** |
| --- | --- | --- | --- | --- |
| CEINTRO | BCEINTRO | Remove incentive test changes | **Universe:** (BAdmin.ExitInterview <> 1) AND (BAdmin.ReplaceSpawn <> 1) AND (BFront.Start= 1 or 2) AND (BFront.INTROB ne 2-6)  **Block instructions:** IF (INTNMBR=2 AND PIN\_FLAG=1, 2 or 3) goto DEBT40  ELSE goto CEINTRO | **Universe:** (BAdmin.ExitInterview <> 1) AND (BAdmin.ReplaceSpawn <> 1) AND (BFront.Start= 1 or 2) AND (BFront.INTROB ne 2-6) |
| CEINTRO | DEBT40 | Delete variable | **After completing the last interview in ^REF\_MONTH, we gave you the PIN for a $40 debit card. Did you have any problems using that card?**   * Enter all that apply, separate with commas  1. No problems 2. Have not received the card 3. Have not used the card 4. ATM did not accept the debit card 5. Store did not accept the debit card 6. Forgot PIN 7. PIN did not work 8. Instructions were not clear 9. Instructions were lost 10. Lost or misplaced debit card 11. Other – specify 12. Don’t know   Skip instructions:  0-2, 9: IF 0, 1, 2, or 9 is selected with any other answer list option then goto CK\_DEBT40  ELSEIF PIN\_FLAG=1 goto DEBT20  ELSE goto CE\_INTRO  3-8, 10-11: IF 10 is selected goto DEBT40SP  ELSEIF PIN\_TYPE=1 goto DEBT20  ELSE goto CE\_INTRO  REF: IF PIN\_TYPE=1 goto DEBT20  ELSE goto CE\_INTRO | Delete variable |
| CEINTRO | DEBT40SP | Delete variable | * Specify:   Skip instructions:  IF PIN\_TYPE=1 goto DEBT20  ELSE goto CE\_INTRO | Delete variable |
| CEINTRO | DEBT20 | Delete variable | **After the last interview in ^REF\_MONTH, we sent you a debit card for $20. Did you have any problems using the card?**   * Enter all that apply, separate with commas  1. No problems 2. Have not received the card 3. Have not used the card 4. ATM did not accept the debit card 5. Store did not accept the debit card 6. Forgot PIN 7. PIN did not work 8. Instructions were not clear 9. Instructions were lost 10. Lost or misplaced debit card 11. Other – specify 12. Don’t know   Skip instructions:  0-2, 9: IF 0, 1, 2, or 9 is selected with any other answer list option then goto CK\_DEBT40  ELSEIF 1 or 9 is selected goto NOTRCV20  ELSE goto CE\_INTRO  3-8, 10-11: IF 10 is selected goto DEBT20SP  ELSE goto CE\_INTRO  REF: goto CE\_INTRO | Delete variable |
| CEINTRO | DEBT20SP | Delete variable | * Specify:   Skip instructions:  goto CE\_INTRO | Delete variable |
| CEINTRO | NOTRCV20 | Delete variable | **I’m sorry that [fill1: you have not received the card/the original debit card we sent you was misplaced]. We will send you a replacement card in the amount of $20 as soon as possible. If the original card [fill2: arrives/is found], please destroy it since we will be deactivating it.**   1. Enter 1 to continue   Fill1 instructions:  If DEBT20=1 fill “**you have not received the card**”  If DEBT20=9 fill “**the original debit card we sent you was misplaced**”  Fill2 instructions:  If DEBT20=1 fill “**arrives**“  If DEBT20=9 fill “**is found**”  Skip instructions:  goto RCRDNM20 | Delete variable |
| CEINTRO | RCRDNM20 | Delete variable | **Who would you like the replacement card addressed to?**  Skip instructions:  100 characters, DK, REF: goto CEINTRO | Delete variable |
| CEINTRO | CE\_INTRO | Remove incentive test changes | **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.**  **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 ^REF\_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.**  **^Debit**   1. Enter 1 to continue   **Debit fill instructions:**  If (INTNMBR=2 AND PIN\_FLAG=1,2, or 3) fill “**Please do not include any purchases made with the debit ^CARDS we have sent you.**”  **CARDS fill instructions:**  If INTNMBR=2 and PIN\_FLAG=1, fill “**cards**” else fill “**card**”  Skip instructions:  goto BUSCREEN | **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.**  **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 ^REF\_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.**   1. Enter 1 to continue   Skip instructions:  goto BUSCREEN |

**Section 2/2B changes**

| **CEQ Section** | **CEQ CAPI Variable** | **Change Detail** | **201607 Wording/Specification** | **201704 Wording/Specification** |
| --- | --- | --- | --- | --- |
| 2/2B | RENTX2 | Add a soft error prompt for values that are significantly above or below the amount entered for the 1st month of the reference period (changes in **red**) | **What was the total rental payment for ^TWO\_MONTH for this unit?**  Skip instructions:  0-9999999: IF RENTX2 gt 3000 then goot ERR1\_RENTX2 ELSE goto RENTX3  DK, REF: goto RENTX3 | **What was the total rental payment for ^TWO\_MONTH for this unit?**  Skip instructions:  0-9999999: IF RENTX2 gt 3000 then goot ERR1\_RENTX2 ELSE goto RENTX3  **ELSEIF RENTX1 ne 0 AND RENTX2 ne 0 AND ((RENTX2 le 0.6 \* RENTX1) OR (RENTX2 ge 1.4 \* RENTX1)) goto ERR2\_RENTX2**  DK, REF: goto RENTX3 |
| 2/2B | ERR2\_RENTX2 | New soft error prompt for RENTX2 values that are not zero but are significantly greater or lesser than RENTX1 when RENTX1 is not 0. | N/A | * THE VALUE ENTERED IS CONSIDERABLY HIGHER OR LOWER THAN THE VALUE FOR THE PREVIOUS MONTH   PLEASE VERIFY  Skip instructions:  Suppress: goto RENTX3  All others, go back to RENTX2 |
| 2/2B | RENTX3 | Add a soft error prompt for values that are significantly above or below the amount entered for the 2ND month of the reference period (changes in **red**) | **What was the total rental payment for ^LAST\_MONTH for this unit?**  Skip instructions:  0-9999999: IF RENTX3 gt 3000 then goot ERR1\_RENTX3 ELSE goto RTELECT  DK, REF: goto RTELECT | **What was the total rental payment for ^LAST\_MONTH for this unit?**  Skip instructions:  0-9999999: IF RENTX3 gt 3000 then goot ERR1\_RENTX3 ELSE goto RTELECT  **ELSEIF RENTX2 ne 0 AND RENTX3 ne 0 AND ((RENTX3 le 0.6 \* RENTX2) OR (RENTX3 ge 1.4 \* RENTX2)) goto ERR2\_RENTX3**  DK, REF: goto RTELECT |
| 2/2B | ERR2\_RENTX3 | New soft error prompt for RENTX3 values that are not zero but are significantly greater or lesser than RENTX2 when RENTX2 is not 0. | N/A | * THE VALUE ENTERED IS CONSIDERABLY HIGHER OR LOWER THAN THE VALUE FOR THE PREVIOUS MONTH   PLEASE VERIFY  Skip instructions:  Suppress: goto RTELECT  All others, go back to RENTX3 |

**Section 2 only changes**

| **CEQ Section** | **CEQ CAPI Variable** | **Change Detail** | **201607 Wording/Specification** | **201704 Wording/Specification** |
| --- | --- | --- | --- | --- |
| 2 | UNITFEAT | Add response option and output variable for solar panels | **Does this unit have any of the following?**   * Enter all that apply, separate with commas  1. None 2. Swimming Pool 3. Off Street Parking 4. Porch, terrace, patio, or balcony 5. Apartment or guest house 6. Central air conditioning 7. Window air conditioning 8. Don’t know   Store instructions:  IF precode 1 selected, store 01 in SWIMPOOL  IF precode 2 selected, store 02 in OFSTPARK  IF precode 3 selected, store 03 in PORCH  IF precode 4 selected, store 04 in APTMENT  IF precode 5 selected, store 05 in CNTRALAC  IF precode 6 selected, store 06 in WINDOWAC  IF precode 77 selected, store 07 in DNTKNOW  IF RF is entered, store 98 in SWIMPOOL, OFSTPARK, PORCH, APTMENT, CNTRALAC, WINDOWAC, and DNTKNOW  IF 0 is entered, store a blank in SWIMPOOL, OFSTPARK, PORCH, APTMENT, CNTRALAC, WINDOWAC, and DNTKNOW  Special instructions:  Answer list options 1-**6** should be in bold black  (Options 0 and 77 should be in regular black)  Skip instructions:  IF 0 is selected with other values then goto CK\_UNITFEAT  ELSEIF 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  1. None 2. Swimming Pool 3. Off Street Parking 4. Porch, terrace, patio, or balcony 5. Apartment or guest house 6. Central air conditioning 7. Window air conditioning 8. **Solar panels** 9. Don’t know   Store instructions:  IF precode 1 selected, store 01 in SWIMPOOL  IF precode 2 selected, store 02 in OFSTPARK  IF precode 3 selected, store 03 in PORCH  IF precode 4 selected, store 04 in APTMENT  IF precode 5 selected, store 05 in CNTRALAC  IF precode 6 selected, store 06 in WINDOWAC  **IF precode 7 selected, store 08 in SOLARPNL**  IF precode 77 selected, store 07 in DNTKNOW  IF RF is entered, store 98 in SWIMPOOL, OFSTPARK, PORCH, APTMENT, CNTRALAC, WINDOWAC, **SOLARPNL,** and DNTKNOW  IF 0 is entered, store a blank in SWIMPOOL, OFSTPARK, PORCH, APTMENT, CNTRALAC, WINDOWAC, **SOLARPNL,** and DNTKNOW  Special instructions:  Answer list options 1-**7** should be in bold black  (Options 0 and 77 should be in regular black)  Skip instructions:  IF 0 is selected with other values then goto CK\_UNITFEAT  ELSEIF 8500.YRBUILT=EMPTY then goto YRBUILT  ELSE exit block and goto Section 3. |

**Section 3F changes**

| **CEQ Section** | **CEQ CAPI Variable** | **Change Detail** | **201607 Wording/Specification** | **201704 Wording/Specification** |
| --- | --- | --- | --- | --- |
| 3F | ORG\_INTR | Update skip instructions for new REFI question. | **Now I will ask some questions about your ^LOAN\_RANK ^MORTGAGE\_LUMPSUM.**  **These questions refer to the ^MORTGAGE\_LUMPSUM you are currently making payments on.**   1. Continue 2. Delete the loan   Skip instructions:  1: Goto **ORGMRTX**  2: Goto S3FG\_END | **Now I will ask some questions about your ^LOAN\_RANK ^MORTGAGE\_LUMPSUM.**  **These questions refer to the ^MORTGAGE\_LUMPSUM you are currently making payments on.**   1. Continue 2. Delete the loan   Skip instructions:  1: Goto **REFI**  2: Goto S3FG\_END |
| 3F | REFI | * New question to ask whether they have ever refinanced the loan * Updated “Have” to the Have/Has fill | n/a | **^HaveHas\_C ^YOU\_YRCU ever refinanced this mortgage?**   1. Yes 2. No   Skip instructions:  goto FRSTPYYR |
| 3F | FRSTPYYR | * Move FRSTPYYR and FRSTPYMO before ORGMRTX (and after new REFI question) * Add new fills based on response to new REFI question | **In what year did ^YOU\_YRCU make the first payment on this ^MORTGAGE\_LUMPSUM?**  Skip instructions:  1900-9999: IF gt 2010 or lt 1970 then goto ERR1\_FRSTPYYR ELSE goto FRSTPYMO  DK,RF: Goto FRSTPYMO | **In what year did ^YOU\_YRCU make the first payment on this ^MORTGAGE\_LUMPSUM ^AFTERREFINANCING?**  ^FR\_REFINANCE\_YR  AFTERREFINANCING Fill instructions”  if REFI=1 fill “**after refinancing**” else leave blank  FR\_REFINANCE\_YR fill instructions:  if REFI=1 fill “\* Enter year of first payment after the most recent refinancing” else leave blank  Skip instructions:  1900-9999: IF gt 2010 or lt 1970 then goto ERR1\_FRSTPYYR ELSE goto FRSTPYMO  DK,RF: Goto FRSTPYMO |
| 3F | FRSTPYYR | * Move FRSTPYYR and FRSTPYMO before ORGMRTX (and after new REFI question) * Add new fills based on response to new REFI question | **In what month did ^YOU\_YRCU make the first payment on this ^MORTGAGE\_LUMPSUM?**   1. January 2. February 3. March 4. April 5. May 6. June 7. July 8. August 9. September 10. October 11. November 12. December   Skip instructions:  IF FRSTPYYR and FRSTPYMO are gt (current month + 2 and year) then goto CK\_FRPSTYMO  ELSE **MTERM** | **In what month did ^YOU\_YRCU make the first payment on this ^MORTGAGE\_LUMPSUM ^AFTERREFINANCING?**  ^FR\_REFINANCE\_YR   1. January 2. February 3. March 4. April 5. May 6. June 7. July 8. August 9. September 10. October 11. November 12. December   AFTERREFINANCING Fill instructions”  if REFI=1 fill “**after refinancing**” else leave blank  FR\_REFINANCE\_YR fill instructions:  if REFI=1 fill “\* Enter year of first payment after the most recent refinancing” else leave blank  Skip instructions:  IF FRSTPYYR and FRSTPYMO are gt (current month + 2 and year) then goto CK\_FRPSTYMO  ELSE **goto** **ORGMRTX** |
| 3F | ORGMRTX | * Update wording slightly as shown (by replacing “the” with “this” and deleting “first”) * Update skip instructions due to new pattern (ORGMRTX now between FRSTPMO and MTERM) | **What was the amount of the ^MORTGAGE\_LUMPSUM when ^YOU\_YRCU first obtained it, not including any interest?**  Skip instructions:  IF (ORGMRTX ne DK or RF) AND [  (OWNYB = 100 and ORGMRTX lt 5000 or gt 315000) OR  (OWNYB = 200 and ORGMRTX lt 3000 or gt 350000) OR  (OWNYB = 300 and ORGMRTX lt 3000 or gt 400000) OR  (OWNYB = 400 and ORGMRTX lt 1000 or gt 124900) ]  then goto ERR1\_ORGMRTX  ELSE goto **FRSTPYYR** | **What was the amount of this ^MORTGAGE\_LUMPSUM when ^YOU\_YRCU obtained it, not including any interest?**  Skip instructions:  IF (ORGMRTX ne DK or RF) AND [  (OWNYB = 100 and ORGMRTX lt 5000 or gt 315000) OR  (OWNYB = 200 and ORGMRTX lt 3000 or gt 350000) OR  (OWNYB = 300 and ORGMRTX lt 3000 or gt 400000) OR  (OWNYB = 400 and ORGMRTX lt 1000 or gt 124900) ]  then goto ERR1\_ORGMRTX  ELSE goto **MTERM** |

**Section 3I changes**

| **CEQ Section** | **CEQ CAPI Variable** | **Change Detail** | **201607 Wording/Specification** | **201704 Wording/Specification** |
| --- | --- | --- | --- | --- |
| 3I | BSECT3I | Skip ground rent for condos, co-ops, timeshares, and unimproved land | Block instructions:   1. Section Label: Section 3, Part I – Ownership Costs   NOTE: If OWNYB=600, goto VAC\_RNTQ  If there are active loans on this property, goto MORTSPEC  All others goto GRNDRENT | Block instructions:   1. Section Label: Section 3, Part I – Ownership Costs   NOTE: IF OWNYB=600, goto VAC\_RNTQ  IF there are active loans on this property, goto MORTSPEC  **ELSEIF there are no active loans and PROPTYPE=1, goto PAYCONDO**  **ELSEIF there are no active loans and PROPTYPE=2, goto COOPPRG3**  **ELSEIF there are no active loans and PROPTYPE=3 AND TIMESHAR=1, goto PAYHOASS**  **ELSEIF there are no active loans and PROPTYPE=3 AND OWNYB=400, goto PAYHOASS**  **ELSE** goto GRNDRENT |
| 3I | MORTSPEC | * Reword question to mention “**not including this month**” * Skip ground rent for condos, co-ops, timeshares, and unimproved land | **Now I’m going to ask about other ownership costs for your ^PROPDESC.**  **Since the first of ^REF\_MONTH, have ^YOU\_ANYMEM paid more than the amount required on any mortgage or lump sum home equity loan for this property?**   1. Yes 2. No   Skip instructions:  1: goto SPECIALX  2, DK, REF: goto GRNDRENT | **Now I’m going to ask about other ownership costs for your ^PROPDESC.**  **Since the first of ^REF\_MONTH not including this month, have ^YOU\_ANYMEM paid more than the amount required on any mortgage or lump sum home equity loan for this property?**   1. Yes 2. No   Skip instructions:  1: goto SPECIALX  2, DK, REF: **IF PROPTYPE=1, goto PAYCONDO**  **ELSEIF PROPTYPE=2, goto COOPPRG3**  **ELSEIF PROPTYPE=3 AND TIMESHAR=1, goto PAYHOASS**  **ELSEIF PROPTYPE=3 AND OWNYB=400, goto PAYHOASS**  **ELSE** goto GRNDRENT |
| 3I | SPECIALX | * Add “**Since the first of ^REF\_MONTH not including this month –** “ in **grey** to the beginning of the question wording * Update skip instructions to reflect deletion of SPECLXCM * Skip ground rent for condos, co-ops, timeshares, and unimproved land | **How much EXTRA did ^YOU\_YRCU pay?**  Skip instructions:  1-99,999,999: IF le 8 or gt 14,000 then goto ERR1\_SPECIALX ELSE goto **SPECLXCM**  DK, RF: goto GRNDRENT | **Since the first of ^REF\_MONTH not including this month -**  **How much EXTRA did ^YOU\_YRCU pay?**  Skip instructions:  1-99,999,999: IF SPECIALX le 8 or gt 14,000 then goto ERR1\_SPECIALX **ELSEIF PROPTYPE=1, goto PAYCONDO**  **ELSEIF PROPTYPE=2, goto COOPPRG3**  **ELSEIF PROPTYPE=3 AND TIMESHAR=1, goto PAYHOASS**  **ELSEIF PROPTYPE=3 AND OWNYB=400, goto PAYHOASS**  ELSE goto **GRNDRENT**  DK, RF: **IF PROPTYPE=1, goto PAYCONDO**  **ELSEIF PROPTYPE=2, goto COOPPRG3**  **ELSEIF PROPTYPE=3 AND TIMESHAR=1, goto PAYHOASS**  **ELSEIF PROPTYPE=3 AND OWNYB=400, goto PAYHOASS**  **ELSE** goto GRNDRENT |
| 3I | SPECLXCM | Delete variable. | **How much of that amount was paid this month?**  Skip instructions:  0-99,999,999: IF SPECLXCM lt 5 or gt 1762 then goto ERR1\_SPECLXCM  ELSEIF SPECLXCM gt SPECIALX then goto CK\_SPECLXCM  ELSE goto GRNDRENT  DK, REF: goto GRNDRENT | Delete variable. |
| 3I | GRNDRENT | * Reword question to mention “**not including this month**” * Remove references to PROPTYPE in skip instructions (only PROPTYPE=3 will be on path for GRNRENT) | **^OWNCOSTS**  **Since the first of ^REF\_MONTH, ^have\_has2 ^YOU\_YRCU made any payments for ground or land rent for ^PROPDESC?**   1. Yes 2. No   Skip instructions:  1: goto GRNDRNTX  2, DK, REF: **IF PROPTYPE=1 then goto PAYCONDO**  **IF PROPTYPE=2 then goto COOPRG3**  **IF PROPTYPE=3 then** goto PAYHOASS | **^OWNCOSTS**  **Since the first of ^REF\_MONTH not including this month, ^have\_has2 ^YOU\_YRCU made any payments for ground or land rent for ^PROPDESC?**   1. Yes 2. No   Skip instructions:  1: goto GRNDRNTX  2, DK, REF: goto PAYHOASS |
| 3I | GRNDRNTX | * Add “**Since the first of ^REF\_MONTH not including this month –** “ in **grey** to the beginning of the question wording * Update skip instructions to reflect deletion of GRNDRNTX * Remove references to PROPTYPE in skip instructions (only PROPTYPE=3 will be on path for GRNRENT) | **What was the total amount paid?**  Skip instructions:  1-99999999: IF GRNDRNTX lt 45 or gt 2465 then goto ERR1\_GRNDRNTX  **ELSE** **goto** **GRNDRTCX**  DK, REF: **IF PROPTYPE=1 then goto PAYCONDO**  **IF PROPTYPE=2 then goto COOPRG3**  **IF PROPTYPE=3 then** goto PAYHOASS | **Since the first of ^REF\_MONTH not including this month -**  **What was the total amount paid?**  Skip instructions:  1-99999999: IF GRNDRNTX lt 45 or gt 2465 then goto ERR1\_GRNDRNTX  **ELSE goto PAYHOASS**  DK, REF: goto PAYHOASS |
| 3I | GRNDRTCX | Delete variable. | **How much of that amount was paid this month?**  Skip instructions:  0-99,999,999: IF GRNDRTCX=1-5 or gt 759 then goto ERR1\_GRNDRTCX  ELSEIF GRNDRTCX gt GRNDRNTX then goto CK\_GRNDRTCX  ELSEIF PROPTYPE=1 then goto PAYCONDO  ELSEIF PROPTYPE=2 then goto COOPRG3  ELSE goto PAYHOASS  DK, REF: IF PROPTYPE=1 then goto PAYCONDO  IF PROPTYPE=2 then goto COOPRG3  IF PROPTYPE=3 then goto PAYHOASS | Delete variable. |
| 3I | COOPRG3 | Reword question to mention “**not including this month**” | **Now I’d like to ask you about payments ^YOU\_YRCU ^make\_makes directly to the cooperative for ^YR\_YRCUS share of its costs.**  **Since the first of ^REF\_MONTH, have ^YOU\_ANYMEM made any payments for any of the following things –**   * Read each item on the list   Enter all that apply, separate with commas  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, heat 10. Trash collection 11. Other 12. No payments made 13. Don’t know   Skip instructions:  12, REF: goto SPCLPAY  1-11, 77: IF 11 selected then goto CORGOTH ELSE goto MGOTHERX | **Now I’d like to ask you about payments ^YOU\_YRCU ^make\_makes directly to the cooperative for ^YR\_YRCUS share of its costs.**  **Since the first of ^REF\_MONTH not including this month, have ^YOU\_ANYMEM made any payments for any of the following things –**   * Read each item on the list   Enter all that apply, separate with commas  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, heat 10. Trash collection 11. Other 12. No payments made 13. Don’t know   Skip instructions:  12, REF: goto SPCLPAY  1-11, 77: IF 11 selected then goto CORGOTH ELSE goto MGOTHERX |
| 3I | MGOTHER | * Reword question to mention “**not including this month**” * Update skip instructions to account for new variable MGOTHPYX * Revised skip pattern | **Since the first of ^REF\_MONTH, have you made ANY regular payments for these services?**   1. Yes 2. No   Skip instructions:  1, DK, REF: goto **MGOTHERX**  2: IF PROPTYPE=2 then goto SPCLPAY1 ELSE goto SPCLPAY2 | **Since the first of ^REF\_MONTH not including this month, have you made ANY regular payments for these services?**   1. Yes 2. No   Skip instructions:  1, DK, REF: goto **MGOTHPPD**  2: IF PROPTYPE=2 then goto SPCLPAY1 ELSE goto SPCLPAY2 |
| 3I | MGOTHPPD | * New variable to pick up rate frequency * Reversed order of MGOTHPYX & MGOTHPPD * Revised question wording along current HHIRRPMPA & HHIREGXA | N/A | **How often ^dodoes ^YOU\_YRCU currently pay for these services?**   1. Once a month 2. Every 2 months 3. Quarterly (every 3 months) 4. Once every 4 months 5. Twice a year (every 6 months) 6. Once a year 7. Other   Skip instructions:  1-6: goto MGOTHPYX  7, DK, REF: goto MGOTHERX |
| 3I | MGOTHPYX | * New variable to pick up rate $ amount * Reversed order of MGOTHPYX & MGOTHPPD * Revised question wording along current HHIRRPMPA & HHIREGXA * Corrected skip instructions | N/A | **What is the amount currently paid ^MGOTHPPD?**  Fill instructions:  If MGOTHPPD=1 fill “**once a month**”  ELSEIF MGOTHPPD=2 fill “**every two months”**  ELSEIF MGOTHPPD=3 fill “**every three months”**  ELSEIF MGOTHPPD=4 fill “**every four months”**  ELSEIF MGOTHPPD=5 fill “**every six months”**  ELSEIF MGOTHPPD=6 fill “**once a year”**  Skip instructions:  IF PROPTYPE=2 then goto SPCLPAY1 ELSE goto SPCLPAY2 |
| 3I | MGOTHERX | * Reword question to mention “**not including this month**” * Update skip instructions due to deleting MGOTHRCX | **Since the first of ^REF\_MONTH, how much ^have\_has2 ^YOU\_YRCU paid for these services?**   1. Yes 2. No   Skip instructions:  1-99,999,999: IF OWNYB=100 and MGOTHERX lt 10 or gt 2100 then goto ERR1\_MGOTHERX  ELSEIF OWNYB=200-400 and MGOTHER lt 5 or gt 2610 then goto ERR1\_MGOTHERX  **ELSE goto MGOTHRCX**  0, DK, REF: IF PROPTYPE=2 then goto SPCLPAY1 ELSE goto SPCLPAY2 | **Since the first of ^REF\_MONTH not including this month, how much ^have\_has2 ^YOU\_YRCU paid for these services?**   1. Yes 2. No   Skip instructions:  1-99,999,999: IF OWNYB=100 and MGOTHERX lt 10 or gt 2100 then goto ERR1\_MGOTHERX  ELSEIF OWNYB=200-400 and MGOTHER lt 5 or gt 2610 then goto ERR1\_MGOTHERX  **ELSEIF PROPTYPE=2 then goto SPCLPAY1**  **ELSE goto SPCLPAY2**  0, DK, REF: IF PROPTYPE=2 then goto SPCLPAY1 ELSE goto SPCLPAY2 |
| 3I | MGOTHRCX | Delete variable | **How much of that amount was paid this month?**  Skip instructions:  0-99999999: IF OWNYB=DK or RF and MGOTHRCX=1-5 or gt 11000 then goto ERR1\_MGOTHRCX  ELSEIF OWNYB=100 and MGOTHRCX=1-5 or gt 870 then goto ERR1\_MGOTHRCX  ELSEIF OWNYB=200-400 and MGOTHRCX=1-5 or gt 635 then goto ERR1\_MGOTHRCX  ELSEIF MGOTHRCX gt MGOTHERX then goto CK\_MGOTHRCX  ELSEIF PROPTYPE=2 then goto SPCLPAY1  ELSE goto SPCLPAY2  DK, REF: IF PROPTYPE=2 then goto SPCLPAY1 ELSE goto SPCLPAY2 | Delete variable. |
| 3I | COOPSP3 | Reword question to mention “**not including this month**” | **Since the first of ^REF\_MONTH, what services were provided?**   * 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 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, heat 10. Trash collection 11. Other 12. Don’t know   Skip instructions:  If 11 is selected then goto COSPOTH ELSE goto SPECLX | **Since the first of ^REF\_MONTH not including this month, what services were provided?**   * 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 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, heat 10. Trash collection 11. Other 12. Don’t know   Skip instructions:  If 11 is selected then goto COSPOTH ELSE goto SPECLX |
| 3I | HOCOSP3 | Reword question to mention “**not including this month**” | **Since the first of ^REF\_MONTH, what services were provided?**   * 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 12. Don’t know   Skip instructions:  IF 11 is selected then goto HOSPOTH ELSE goto SPECLX | **Since the first of ^REF\_MONTH not including this month, what services were provided?**   * 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 12. Don’t know   Skip instructions:  IF 11 is selected then goto HOSPOTH ELSE goto SPECLX |
| 3I | SPECLX | * Reword question to mention “**not including this month**” * Update skip instructions due to deleting SPECLCX * Correction to revised skip instructions (reinstating error variable in skip instructions) | **Since the first of ^REF\_MONTH, how much were these special payments?**  Skip instructions:  1-99999999: IF SPECLX gt 6600 then goto ERR1\_SPECLX ELSE goto **SPECLCX**  DK, RF: goto ASSESSMT | **Since the first of ^REF\_MONTH not including this month, how much were these special payments?**  Skip instructions:  1-99999999: IF SPECLX gt 6600 then goto ERR1\_SPECLX ELSE goto **ASSESSMT**  DK, RF: goto ASSESSMT |
| 3I | SPECLCX | Delete variable | **How much of that amount was paid this month?**  Skip instructions:  goto ASSESSMT | Delete variable. |
| 3I | ASSESSMT | Reword question to mention “**not including this month**” | **Since the first of ^REF\_MONTH ^have\_has2 ^YOU\_YRCU paid any special assessments to a local government for construction or repair of roads, sidewalks, or other things like that?**   1. Yes 2. No   Skip instructions:  1: goto ASSESSX  2, DK, REF: if OWNYB=100 then goto RNTEQVX  ELSEIF OWNYB=300 then goto VAC\_OCCQ  ELSE goto S3I\_END | **Since the first of ^REF\_MONTH not including this month ^have\_has2 ^YOU\_YRCU paid any special assessments to a local government for construction or repair of roads, sidewalks, or other things like that?**   1. Yes 2. No   Skip instructions:  1: goto ASSESSX  2, DK, REF: if OWNYB=100 then goto RNTEQVX  ELSEIF OWNYB=300 then goto VAC\_OCCQ  ELSE goto S3I\_END |
| 3I | ASSESSX | * Add “**Since the first of ^REF\_MONTH not including this month –** “ in **grey** to the beginning of the question wording * Update skip instructions to reflect deletion of ASSESSCX * Corrected skip instructions to retain error | **What was the total amount paid?**  Skip instructions:  1-99999999: IF ASSESSX lt 6 or gt 77,000 then goto ERR1\_ASSESSX  **ELSE goto ASSESSCX**  DK, REF: IF OWNYB=100 then goto RNTEQVX  ELSEIF OWNYB=300 then goto VAC\_OCCQ  ELSE goto S3I\_END | **Since the first of ^REF\_MONTH not including this month -**  **What was the total amount paid?**  Skip instructions:  1-99999999: IF ASSESSX lt 6 or gt 77,000 then goto ERR1\_ASSESSX  **ELSEIF OWNYB=100 then goto RNTEQVX**  **ELSEIF OWNYB=300 then goto VAC\_OCCQ**  **ELSE goto S3I\_END**  DK, REF: IF OWNYB=100 then goto RNTEQVX  ELSEIF OWNYB=300 then goto VAC\_OCCQ  ELSE goto S3I\_END |
| 3I | ASSESSCX | Delete variable. | **How much of that amount was paid this month?**  Skip instructions:  IF OWNYB=100 then goto RNTEQVX  ELSEIF OWNYB=300 then goto VAC\_OCCQ  ELSE goto S3I\_END | Delete variable. |
| 3I | VAC\_RNTY | * Update skip instructions to skip VAC\_AVAQ & VAC\_AVAY when time available to be rented = 100% (or equivalents 91+ days, 13 weeks, 3+months) * Add store instructions to set VAC\_AVAQ=0 when time available to be rented = 100% (or equivalents 91+ days, 13 weeks, 3+months) | * Enter time period.  1. Days 2. Weeks 3. Months 4. Percent 5. Other, specify   Skip instructions:  **1-4, DK, RF: goto VAC\_AVAQ**  5: goto VAC\_ROTH | * Enter time period.  1. Days 2. Weeks 3. Months 4. Percent 5. Other, specify   **Store instructions:**  **IF (VAC\_RNTQ=100 and VAC\_RNTY=4) OR (VAC\_RNTQ ge 91 and VAC\_RNTY=1) OR (VAC\_RNTQ ge 13 and VAC\_RNTY=2) OR (VAC\_RNTQ ge 3 and VAC\_RNTY=3) store ‘0’ (zero) in VAC\_AVAQ**  Skip instructions:  **1: IF VAC\_RNTQ ge 91 AND OWNYB=300 then goto RNTEQV2X**  **ELSEIF VAC\_RNTQ ge 91 goto S3I\_END**  **ELSE goto VAC\_AVAQ**  **2: IF VAC\_RNTQ ge 13 AND OWNYB=300 then goto RNTEQV2X**  **ELSEIF VAC\_RNTQ ge 13 goto S3I\_END**  **ELSE goto VAC\_AVAQ**  **3: IF VAC\_RNTQ ge 3 AND OWNYB=300 then goto RNTEQV2X**  **ELSEIF VAC\_RNTQ ge 3 goto S3I\_END**  **ELSE goto VAC\_AVAQ**  **4: IF VAC\_RNTQ=100 AND OWNYB=300 then goto RNTEQV2X**  **ELSEIF VAC\_RNTQ=100 goto S3I\_END**  **ELSE goto VAC\_AVAQ**  **DK, RF: goto VAC\_AVAQ**  5: goto VAC\_ROTH |

**Section 4A changes**

| **CEQ Section** | **CEQ CAPI Variable** | **Change Detail** | **201607 Wording/Specification** | **201704 Wording/Specification** |
| --- | --- | --- | --- | --- |
| 4A | S4A\_INTRO | Delete last line of intro text | **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.**   1. Enter 1 to Continue   Skip instructions:  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.**   1. Enter 1 to Continue   Skip instructions:  Goto TELEBILL |
| 4A | TELEBILL | Change “telephone services, including …” to “telephone, internet, cable TV, or satellite TV services” | **Since the first of ^REF\_MONTH, have ^YOU\_ANYMEM received any bills for telephone services, including cellular and Voice Over IP? Do not include bills for telephones used entirely for business purposes.**   1. Yes 2. No   Skip instructions:  1: IF any 8500.TELCOMP = 1-20 then goto PREVCOMP  ELSE goto TELCOMP  2,DK,RF: Goto S4A\_END | **Since the first of ^REF\_MONTH, have ^YOU\_ANYMEM received any bills for telephone, internet, cable TV, or satellite TV services? Do not include bills for telephones used entirely for business purposes.**   1. Yes 2. No   Skip instructions:  1: IF any 8500.TELCOMP = 1-20 then goto PREVCOMP  ELSE goto TELCOMP  2,DK,RF: Goto S4A\_END |
| 4A | TBLPHONE | Update section label to also include internet and cable/satellite TV | Block instructions:  3. Section Label: Section 4, Part A - Telephone Expenses | Block instructions:  3. Section Label: Section 4, Part A – Telephone**, Internet, and Cable/Satellite TV** Expenses |
| 4A | PREVCOMP | Change question wording to a fill in which the first time the question appears the text is different than subsequent times the question appears | **What is the name of the company which provides the service?**   1. ^Temprevcomp[1]   ….   1. ^Temprevcomp[20] 2. Company name not listed 3. Delete the line   Store instructions:   1. Store company name selected in TELCOMP and show TELCOMP 2. IF PREVCOMP = 888, set TELCOMP = 888   IF PREVCOMP = 888 then "SHOW" the fields in the row  Skip instructions:  1-20: IF BCeintro.BUSCREEN = 2 goto TELCHGX1  ELSE goto TELBSNS  55: Goto TELCOMP  888: Goto TELOTH | **^Fill**   1. ^Temprevcomp[1]   ….   1. ^Temprevcomp[20] 2. Company name not listed 3. Delete the line   **Fill instructions:**  First time PREVCOMP appears, fill “**We will review these expenses by bills you’ve received. What is the name of the first company you received a bill for?**”  ELSE fill “**What is the name of the next company?”**  Store instructions:   1. Store company name selected in TELCOMP and show TELCOMP 2. IF PREVCOMP = 888, set TELCOMP = 888   IF PREVCOMP = 888 then "SHOW" the fields in the row  Skip instructions:  1-20: IF BCeintro.BUSCREEN = 2 goto TELCHGX1  ELSE goto TELBSNS  55: Goto TELCOMP  888: Goto TELOTH |
| 4A | TELCOMP | * Change the question wording fill in instances where PREVCOMP is not asked to show one question the first time it is asked and then to a different fill on subsequent times the question appears * Add hard error message for “Netflix” and “Hulu” | **^Telcom\_fill2**   * Enter 888 to delete the line   Telcom\_fill2 instructions:  IF PREVCOMP = 55, Fill "Enter company name"  ELSE, fill "**What is the name of the company which provides the service?**"  Special Instructions:  IF TELCOMP = 888 then "SHOW" the fields in the row  Skip Instructions:  888: Goto TELOTH  All others: IF BCeintro.BUSCREEN = 2 goto TELCHGX1  ELSE goto TELBSNS | **^Telcom\_fill2**   * Enter 888 to delete the line   Telcom\_fill2 instructions:  IF PREVCOMP = 55, Fill "Enter company name"  ELSE, if this is the first time TELCOMP appears, fill “**We will review these expenses by bills you’ve received. What is the name of the first company you received a bill for?**”  ELSE fill “**What is the name of the next company?”**  Special Instructions:  IF TELCOMP = 888 then "SHOW" the fields in the row  Skip Instructions:  888: Goto TELOTH  All others: **IF “Netflix” or “Hulu” entered goto CK\_TELCOMP**  **ELSE**IF BCeintro.BUSCREEN = 2 goto TELCHGX1  ELSE goto TELBSNS |
| 4A | CK\_TELCOMP | Add hard error message for any entries of “Netflix” or “Hulu” to instruct | N/A | * Internet video streaming services, such as Netflix and Hulu, are collected in Section 17 under “Rented video files or DVDs or streaming video subscriptions.”   Please delete this line.  Skip instructions:  Go back to TELCOMP |
| 4A | TELCHGX3 | Update skip instructions due to new/revised TELSERV (based off of TELTEMP) now before TYPETEL | **How much were you billed for in ^LAST\_MONTH?**  **Do not include any unpaid charges from a previous billing period.**  Skip instructions:  1-999999: IF entry lt 7 or gt 400 then goto ERR1\_TELCHGX3  ELSEIF TELCHGX1 = 0 OR TELCHGX2 = 0 then goto BILPERD  ELSE goto **TYPETEL**  0: Goto BILPERD  DK,RF: IF TELCHGX1 = 0 OR TELCHGX2 = 0 then goto BILPERD  ELSE goto **TYPETEL** | **How much were you billed for in ^LAST\_MONTH?**  **Do not include any unpaid charges from a previous billing period.**  Skip instructions:  1-999999: IF entry lt 7 or gt 400 then goto ERR1\_TELCHGX3  ELSEIF TELCHGX1 = 0 OR TELCHGX2 = 0 then goto BILPERD  ELSE goto **TYPETEL**  0: Goto BILPERD  DK,RF: IF TELCHGX1 = 0 OR TELCHGX2 = 0 then goto BILPERD  ELSE goto **TYPETEL** |
| 4A | BILPERD | Update skip instructions due to new/revised TELSERV (based off of TELTEMP) now before TYPETEL | **What is your usual billing period for this service?**   1. Month 2. 2 months 3. Quarter 4. Annual 5. Other   Skip instructions:  Goto **TYPETEL** | **What is your usual billing period for this service?**   1. Month 2. 2 months 3. Quarter 4. Annual 5. Other   Skip instructions:  Goto **TELSERV** |
| 4A | TELSERV  (modified from TELTEMP) | * Modified/new variable (based on TELTEMP) to ask which services were included in the bill. * Use store instructions from TELTEMP with modifications based on new list (i.e., phone service is #1 in list; no ‘apps, games, ringtones’; removal of 77) * (Delete TAPPGAME variables) * Add store instructions for internet if it is the only thing selected to set bill amounts in each month equal to the internet breakout amount for each month. * Add store instructions for TV if it is the only thing selected to set bill amount in each month equal to the TV breakout amount * Revised skip instructions to say “if more than one item selected goto TELBLPRS” | N/A | **Which of the following telephone service items were included in the bill(s) –**   * Read each item on list. * Enter all that apply, separate with commas.  1. **Telephone service (mobile, residential, or Voice over IP)?** 2. **Internet service (including broadband, DSL, and dial-up)?** 3. **Cable or satellite television service?**   Store instructions:   1. **IF 1 is selected then set TPHONE = 1**   **IF 1 is NOT selected then set TPHONE = 2**  IF **2 is selected then set** TINTNET = 1  IF **2** is NOT selected then set TINTNET = 2  IF **3** is selected then set TCABLE = 1  IF **3** is NOT selected then set TCABLE = 2  IF **DK or** RF is entered then  **Set TPHONE = 8**  set TINTNET = 8  set TCABLE = 8  ~~set DKPHONE = 8~~   1. IF only 2 selected, store TELCHGX1 in TINTNTX1, TELCHGX2 in TINTNTX2, and TELCHGX3 in TINTNTX3. ELSE leave blank. 2. IF only 3 selected, store TELCHGX1 in TCABLEX1, TELCHGX2 in TCABLEX2, and TELCHGX3 in TCABLEX3. ELSE leave blank.   Special Instructions:  Answer list descriptions for 1-3 should be in bold black.  Skip instructions:  1-3: IF 1 selected, goto TYPETEL  ELSEIF more than 1 item selected goto TELBLPRS  ELSE goto TELOTH  DK, RF: goto TELOTH |
| 4A | TYPETEL | Update skip instructions due to removal of TELTEMP and updated needs on whether to ask breakout questions (only ask if more than one service selected in TELSERV) | **What types of telephone services did the bill include -**  Read each item on list.  Enter all that apply, separate with commas.   1. **Residential Service including Voice over IP?** 2. **Mobile or Cellular Service including prepaid?**   Store instructions:  IF 1 is selected then set TELRESD = 1  IF 2 is selected then set TELCELL = 2  IF DK is selected then set TELRESD = 9 and TELCELL = 9  IF RF is selected then set TELRESD = 8 and TELCELL = 8  Skip instructions:  **Goto** **TELTEMP** | **What types of telephone services did the bill include -**  Read each item on list.  Enter all that apply, separate with commas.   1. **Residential Service including Voice over IP?** 2. **Mobile or Cellular Service including prepaid?**   Store instructions:  IF 1 is selected then set TELRESD = 1  IF 2 is selected then set TELCELL = 2  IF DK is selected then set TELRESD = 9 and TELCELL = 9  IF RF is selected then set TELRESD = 8 and TELCELL = 8  Skip instructions:  **IF 2 or 3 selected in TELSERV goto TELBLPRS**  **ELSE goto TELOTH** |
| 4A | TELTEMP | Delete question but retain output variables used with new TELSERV question | **Which of the following telephone service items were included in the bill(s) -**  ^TELTEMP\_FILL  Read each item on list.  Enter all that apply, separate with commas.  0. None  **1. Internet service (including broadband, DSL and dial-up)?**  **2. Cable or satellite television service?**  **3. Applications, games, or ringtones?**  77. Misc Combined (Unable to specify/ DK)  Store instructions:  IF 1 is selected then set TINTNET = 1  IF 1 is NOT selected then set TINTNET = 2  IF 2 is selected then set TCABLE = 1  IF 2 is NOT selected then set TCABLE = 2  IF 3 is selected then set TAPPGAME = 1  IF 3 is NOT selected then set TAPPGAME = 2  IF 77 is selected then set DKPHONE = 1  IF 77 is NOT selected then set DKPHONE = 2  IF RF is entered then  set TINTNET = 8  set TCABLE = 8  set TAPPGAME = 8  set DKPHONE = 8  Skip instructions:  0,77: IF 0 only or 77 only then goto TELOTH  ELSEIF 0 is selected with another option then goto CK\_TELTEMP  1-3: Goto TELBLPRS  DK,RF: Goto TELOTH | Delete variable but keep TINTNET and TCABLE (see TELSERV) |
| 4A | TELBLPRS | * Skip breakout amount questions (for internet, cable) if total bill amount for the month is zero * Update skip instructions due to new TELSERV question (replacing TELTEMP) and deletion of apps/games/ringtones * Add store instructions for months where bill amount is zero if TELBLPRS=1 (yes) | * Is respondent referring to a detailed bill, including online or digital?   Do not include checkbooks   1. Yes 2. No   Skip instructions:  1: IF 1 selected in TELTEMP then goto TINTNTX1  ELSEIF 2 selected in TELTEMP then goto TCABLEX1  ELSE goto TAPPGMX1  2: goto TELOTH | * Is respondent referring to a detailed bill, including online or digital?   Do not include checkbooks   1. Yes 2. No   **Store instructions:**   1. **IF TELBLPRS=1, then store as follows:**   **IF TELCHGX1=0 and 2 selected in TELSERV, store 0 in TINTNTX1**  **IF TELCHGX2=0 and 2 selected in TELSERV, store 0 in TINTNTX2**  **IF TELCHGX3=0 and 2 selected in TELSERV, store 0 in TINTNTX3**  **IF TELCHGX1=0 and 3 selected in TELSERV, store 0 in TCABLEX1**  **IF TELCHGX2=0 and 3 selected in TELSERV, store 0 in TCABLEX2**  **IF TELCHGX3=0 and 3 selected in TELSERV, store 0 in TCABLEX3**  Skip instructions:  1: IF **2** selected in **TELSERV** **and TELCHGX1 ne 0** then goto TINTNTX1  **ELSEIF 2 selected in TELSERV and TELCHGX2 ne 0 then goto TINTNTX2**  **ELSEIF 2 selected in TELSERV and TELCHGX3 ne 0 then goto TINTNTX3**  ELSEIF **3** selected in **TELSERV and** **TELCHGX1 ne 0** then goto TCABLEX1  ELSEIF **3** selected in **TELSERV and** **TELCHGX2 ne 0** then goto TCABLEX2  ELSEIF **3** selected in **TELSERV and** **TELCHGX3 ne 0** then goto TCABLEX3  **ELSE goto TELOTH**  2: goto TELOTH |
| 4A | TINTNTX1 | * Skip breakout amount questions (for internet, cable) if total bill amount for the month is zero * Reword the question slightly to include fill for TELCHGX1 amount (if not 0, DK, or REF) * Update skip instructions due to new TELSERV question (replacing TELTEMP) and deletion of apps/games/ringtones | **How much of the ^REF\_MONTH charges were for internet access?**  ^DataPlans\_Fill  Skip instructions:  1-999999: IF TINTNTX1 lt 5 OR gt 60 then goto ERR1\_TINTNTX1  ELSEIF TINTNTX1 gt TELCHGX1 then goto CK\_TINTNTX1  ELSE goto TINTNTX2  0, DK, RF: goto TINTNTX2 | **How much of the ^TELCHGX1 charges in ^REF\_MONTH were for internet access?**  ^DataPlans\_Fill  **TELCHGX1 fill instructions:**  IF TELCHGX1 ne 0, DK, or REF fill TELCHGX1  ELSE leave blank  Skip instructions:  1-999999: IF TINTNTX1 lt 5 OR gt 60 then goto ERR1\_TINTNTX1  ELSEIF TINTNTX1 gt TELCHGX1 then goto CK\_TINTNTX1  ELSE**IF TELCHGX2 ne 0** goto TINTNTX2  **ELSEIF TELCHGX3 ne 0 goto TINTNTX3**  **ELSEIF 3 selected in TELSERV and TELCHGX1 ne 0 then goto TCABLEX1**  **ELSEIF 3 selected in TELSERV and TELCHGX2 ne 0 then goto TCABLEX2**  **ELSEIF 3 selected in TELSERV and TELCHGX3 ne 0 then goto TCABLEX3**  **ELSE goto TELOTH**  0, DK, RF: **IF TELCHGX2 ne 0** goto TINTNTX2  **ELSEIF TELCHGX3 ne 0 goto TINTNTX3**  **ELSEIF 3 selected in TELSERV and TELCHGX1 ne 0 then goto TCABLEX1**  **ELSEIF 3 selected in TELSERV and TELCHGX2 ne 0 then goto TCABLEX2**  **ELSEIF 3 selected in TELSERV and TELCHGX3 ne 0 then goto TCABLEX3**  **ELSE goto TELOTH** |
| 4A | TINTNTX2 | * Skip breakout amount questions (for internet, cable) if total bill amount for the month is zero * Reword the question slightly to include fill for TELCHGX2 amount (if not 0, DK, or REF) * Update skip instructions due to new TELSERV question (replacing TELTEMP) and deletion of apps/games/ringtones | **How much of the ^TWO\_MONTH charges were for internet access?**  ^DataPlans\_Fill  Skip instructions:  1-999999: IF TINTNTX2 lt 5 OR gt 60 then goto ERR1\_TINTNTX2  ELSEIF TINTNTX2 gt TELCHGX2 then goto CK\_TINTNTX2  ELSE goto TINTNTX3  0, DK, RF: goto TINTNTX3 | **How much of the ^TELCHGX2 charges in ^TWO\_MONTH were for internet access?**  ^DataPlans\_Fill  **TELCHGX2 fill instructions:**  IF TELCHGX2 ne 0, DK, or REF fill TELCHGX2  ELSE leave blank  Skip instructions:  1-999999: IF TINTNTX2 lt 5 OR gt 60 then goto ERR1\_TINTNTX2  ELSEIF TINTNTX2 gt TELCHGX2 then goto CK\_TINTNTX2  ELSE**IF TELCHGX3 ne 0**  goto TINTNTX3  **ELSEIF 3 selected in TELSERV and TELCHGX1 ne 0 then goto TCABLEX1**  **ELSEIF 3 selected in TELSERV and TELCHGX2 ne 0 then goto TCABLEX2**  **ELSEIF 3 selected in TELSERV and TELCHGX3 ne 0 then goto TCABLEX3**  **ELSE goto TELOTH**  0, DK, RF: **IF TELCHGX3 ne 0** goto TINTNTX3  **ELSEIF 3 selected in TELSERV and TELCHGX1 ne 0 then goto TCABLEX1**  **ELSEIF 3 selected in TELSERV and TELCHGX2 ne 0 then goto TCABLEX2**  **ELSEIF 3 selected in TELSERV and TELCHGX3 ne 0 then goto TCABLEX3**  **ELSE goto TELOTH** |
| 4A | TINTNTX3 | * Skip breakout amount questions (for internet, cable) if total bill amount for the month is zero * Reword the question slightly to include fill for TELCHGX3 amount (if not 0, DK, or REF) * Update skip instructions due to new TELSERV question (replacing TELTEMP) and deletion of apps/games/ringtones | **How much of the ^LAST\_MONTH charges were for internet access?**  ^DataPlans\_Fill  Skip instructions:  1-999999: IF TINTNTX3 lt 5 OR gt 60 then goto ERR1\_TINTNTX3  ELSEIF TINTNTX3 gt TELCHGX3 then goto CK\_TINTNTX3  ELSEIF 2 selected in TELTEMP then goto TCABLEX1  ELSEIF 3 selected in TELTEMP then goto TAPPGMX1  ELSE goto TELOTH  0, DK, RF: IF 2 selected in TELTEMP then goto TCABLEX1  ELSEIF 3 selected in TELTEMP then goto TAPPGMX1  ELSE goto TELOTH | **How much of the ^TELCHGX3 charges in ^LAST\_MONTH were for internet access?**  ^DataPlans\_Fill  **TELCHGX3 fill instructions:**  IF TELCHGX3 ne 0, DK, or REF fill TELCHGX3  ELSE leave blank  Skip instructions:  1-999999: IF TINTNTX3 lt 5 OR gt 60 then goto ERR1\_TINTNTX3  ELSEIF TINTNTX3 gt TELCHGX3 then goto CK\_TINTNTX3  ELSEIF **3 selected in TELSERV and TELCHGX1 ne 0**  then goto TCABLEX1  **ELSEIF 3 selected in TELSERV and TELCHGX2 ne 0 then goto TCABLEX2**  **ELSEIF 3 selected in TELSERV and TELCHGX3 ne 0 then goto TCABLEX3**  ELSE goto TELOTH  0, DK, RF: IF **3 selected in TELSERV and TELCHGX1 ne 0**  then goto TCABLEX1  **ELSEIF 3 selected in TELSERV and TELCHGX2 ne 0 then goto TCABLEX2**  **ELSEIF 3 selected in TELSERV and TELCHGX3 ne 0 then goto TCABLEX3**  ELSE goto TELOTH |
| 4A | TCABLEX1 | * Skip breakout amount questions (for internet, cable) if total bill amount for the month is zero * Reword the question slightly to include fill for TELCHGX1 amount (if not 0, DK, or REF) * Update skip instructions due to deletion of apps/games/ringtones | **How much of the ^REF\_MONTH charges were for cable or satellite television service?**  Skip instructions:  1-999999: IF TCABLEX1 lt 5 or gt 90 then goto ERR1\_TCABLEX1  ELSEIF TCABLEX1 gt TELCHGX1 then goto CK\_TCABLEX1  ELSEIF (TCABLEX1 + TINTNTX1) gt TELCHGX1 then goto CK2\_TCABLEX1  ELSE goto TCABLEX2  0, DK, RF: goto TCABLEX2 | **How much of the ^TELCHGX1 charges in ^REF\_MONTH were for cable or satellite television service?**  **TELCHGX1 fill instructions:**  IF TELCHGX1 ne 0, DK, or REF fill TELCHGX1  ELSE leave blank  Skip instructions:  1-999999: IF TCABLEX1 lt 5 or gt 90 then goto ERR1\_TCABLEX1  ELSEIF TCABLEX1 gt TELCHGX1 then goto CK\_TCABLEX1  ELSEIF (TCABLEX1 + TINTNTX1) gt TELCHGX1 then goto CK2\_TCABLEX1  ELSE**IF** **TELCHGX2 ne 0** goto TCABLEX2  **ELSEIF TELCHGX3 ne 0 then goto TCABLEX3**  **ELSE goto TELOTH**  0, DK, RF: **IF** **TELCHGX2 ne 0** goto TCABLEX2  **ELSEIF TELCHGX3 ne 0 then goto TCABLEX3**  **ELSE goto TELOTH** |
| 4A | TCABLEX2 | * Skip breakout amount questions (for internet, cable) if total bill amount for the month is zero * Reword the question slightly to include fill for TELCHGX2 amount (if not 0, DK, or REF) * Update skip instructions due to deletion of apps/games/ringtones | **How much of the ^TWO\_MONTH charges were for cable or satellite television service?**  Skip instructions:  1-999999: IF TCABLEX2 lt 5 or gt 90 then goto ERR1\_TCABLEX2  ELSEIF TCABLEX2 gt TELCHGX2 then goto CK\_TCABLEX2  ELSEIF (TCABLEX2 + TINTNTX2) gt TELCHGX2 then goto CK2\_TCABLEX2  ELSE goto TCABLEX3  0, DK, RF: goto TCABLEX3 | **How much of the ^TELCHGX2 charges in ^TWO\_MONTH were for cable or satellite television service?**  **TELCHGX2 fill instructions:**  IF TELCHGX2 ne 0, DK, or REF fill TELCHGX2  ELSE leave blank  Skip instructions:  1-999999: IF TCABLEX2 lt 5 or gt 90 then goto ERR1\_TCABLEX2  ELSEIF TCABLEX2 gt TELCHGX2 then goto CK\_TCABLEX2  ELSEIF (TCABLEX2 + TINTNTX2) gt TELCHGX2 then goto CK2\_TCABLEX2  ELSE **IF TELCHGX3 ne 0**  goto TCABLEX3  **ELSE goto TELOTH**  0, DK, RF: **IF TELCHGX3 ne 0** goto TCABLEX3  **ELSE goto TELOTH** |
| 4A | TCABLEX3 | * Skip breakout amount questions (for internet, cable) if total bill amount for the month is zero * Reword the question slightly to include fill for TELCHGX3 amount (if not 0, DK, or REF) * Update skip instructions due to deletion of apps/games/ringtones | **How much of the ^LAST\_MONTH charges were for cable or satellite television service?**  Skip instructions:  1-999999: IF TCABLEX3 lt 5 or gt 90 then goto ERR1\_TCABLEX3  ELSEIF TCABLEX3 gt TELCHGX3 then goto CK\_TCABLEX3  ELSEIF (TCABLEX3 + TINTNTX3) gt TELCHGX3 then goto CK2\_TCABLEX3  ELSEIF 3 selected in TELTEMP then goto TAPPGMX1  ELSE goto TELOTH  0, DK, RF: **IF 3 selected in TELTEMP then goto TAPPGMX1**  **ELSE** goto TELOTH | **How much of the ^TELCHGX3 charges in ^LAST\_MONTH were for cable or satellite television service?**  **TELCHGX3 fill instructions:**  IF TELCHGX3 ne 0, DK, or REF fill TELCHGX3  ELSE leave blank  Skip instructions:  1-999999: IF TCABLEX3 lt 5 or gt 90 then goto ERR1\_TCABLEX3  ELSEIF TCABLEX3 gt TELCHGX3 then goto CK\_TCABLEX3  ELSEIF (TCABLEX3 + TINTNTX3) gt TELCHGX3 then goto CK2\_TCABLEX3  ELSE goto TELOTH  0, DK, RF: goto TELOTH |
| 4A | TAPPGMX1 | Delete variable | **How much of the ^REF\_MONTH charges were for applications, games, or ringtones?**  Skip instructions:  1-999999: IF TAPPGMX1 gt 30 then goto ERR1\_TAPPGMX1  ELSEIF TAPPGMX1 gt TELCHGX1 then goto CK\_TAPPGMX1  ELSEIF TAPPGMX1 + TINTNTX1 gt TELCHGX1 then goto CK2\_TAPPGMX1  ELSEIF TAPPGMX1 + TCABLEX1 gt TELCHGX1 then goto CK3\_TAPPGMX1  ELSEIF TAPPGMX1 + TCABLEX1 + TINTNTX1 gt TELCHGX1 then goto CK4\_TAPPGMX1  ELSE goto TAPPGMX2  0, DK, RF: goto TAPPGMX2 | Delete variable. |
| 4A | TAPPGMX2 | Delete variable | **How much of the ^TWO\_MONTH charges were for applications, games, or ringtones?**  Skip instructions:  1-999999: IF TAPPGMX2 gt 30 then goto ERR1\_TAPPGMX2  ELSEIF TAPPGMX2 gt TELCHGX2 then goto CK\_TAPPGMX2  ELSEIF TAPPGMX2 + TINTNTX2 gt TELCHGX2 then goto CK2\_TAPPGMX2  ELSEIF TAPPGMX2 + TCABLEX2 gt TELCHGX2 then goto CK3\_TAPPGMX2  ELSEIF TAPPGMX2 + TCABLEX2 + TINTNTX2 gt TELCHGX2 then goto CK4\_TAPPGMX2  ELSE goto TAPPGMX3  0, DK, RF: goto TAPPGMX3 | Delete variable. |
| 4A | TAPPCMX3 | Delete variable | **How much of the ^LAST\_MONTH charges were for applications, games, or ringtones?**  Skip Instructions:  1-999999: IF TAPPGMX3 gt 30 then goto ERR1\_TAPPGMX3  ELSEIF TAPPGMX3 gt TELCHGX3 then goto CK\_TAPPGMX3  ELSEIF TAPPGMX3 + TINTNTX3 gt TELCHGX3 then goto  CK2\_TAPPGMX3  ELSEIF TAPPGMX3 + TCABLEX3 gt TELCHGX3 then goto  CK3\_TAPPGMX3  ELSEIF TAPPGMX3 + TCABLEX3 + TINTNTX3 gt TELCHGX3 then goto CK4\_TAPPGMX3  ELSE goto TELOTH  0,DK,RF: Goto TELOTH | Delete variable. |
| 4A | TELOTH | Update question wording as shown | **Did ^YOU\_ANYMEM receive any other bills for telephones not used entirely for business purposes?**   1. Yes 2. No   Skip instructions:  1: IF row number = 20 then goto ERR\_MAX  ELSEIF any 8500.TELCOMP = 1-20 then goto PREVCOMP, next row of the table  ELSE goto TELCOMP, next row of the table  2: IF Answer is changed from a 1 to a 2 then goto CK\_TELOTH  ELSE goto S4A\_END | **Did ^YOU\_ANYMEM receive any other bills for telephones, internet, cable TV, or satellite TV services not used entirely for business purposes?**   1. Yes 2. No   Skip instructions:  1: IF row number = 20 then goto ERR\_MAX  ELSEIF any 8500.TELCOMP = 1-20 then goto PREVCOMP, next row of the table  ELSE goto TELCOMP, next row of the table  2: IF Answer is changed from a 1 to a 2 then goto CK\_TELOTH  ELSE goto S4A\_END |

**Section 4B changes**

| **CEQ Section** | **CEQ CAPI Variable** | **Change Detail** | **201607 Wording/Specification** | **201704 Wording/Specification** |
| --- | --- | --- | --- | --- |
| 4B | FONCARD | * Reword question to mention “**not including this month**” * Updated skip instructions due to new INTAWAY question | **Since the first of ^REF\_MONTH, have ^YOU\_ANYMEM purchased any pre-paid long distance telephone cards/minutes, not already reported?**   * Do not include prepaid cellular minutes  1. Yes 2. No   Skip instructions:  1: goto FONCARDX  2, DK, REF: goto **S4B\_END** | **Since the first of ^REF\_MONTH not including this month, have ^YOU\_ANYMEM purchased any pre-paid long distance telephone cards/minutes, not already reported?**   * Do not include prepaid cellular minutes  1. Yes 2. No   Skip instructions:  1: goto FONCARDX  2, DK, REF: goto **INTAWAY** |
| 4B | FONCARDX | * Add “**Since the first of ^REF\_MONTH not including this month –** “ in **grey** to the beginning of the question wording * Update skip instructions to reflect deletion of FONCRDCX * Corrected skip instructions to retain ERR * Updated skip instructions due to new INTAWAY question | **What was the total amount paid?**  Skip instructions:  1-9,999: IF FONCARDX lt 5 or gt 300 then goto ERR1\_FONCARDX  ELSE goto **FONCRDCX**  DK, REF: goto **FONCRDCX** | **Since the first of ^REF\_MONTH not including this month -**  **What was the total amount paid?**  Skip instructions:  1-9,999: IF FONCARDX lt 5 or gt 300 then goto ERR1\_FONCARDX  ELSE goto **INTAWAY**  DK, REF: goto **INTAWAY** |
| 4B | FONCRDCX | Delete variable. | **How much of the total was paid this month?**  Skip instructions:  0-9999: IF FONCRDCX lt 5 or gt 100 then goto ERR1\_FONCRDCX  ELSEIF FONCRDCX gt FONCARDX then goto CK\_FONCRDCX  ELSE goto S4B\_END  DK, RF: goto S4B\_END | Delete variable. |
| 4B | INTAWAY | * New question on internet away from home | n/a | **Since the first of ^REF\_MONTH not including this month, have ^YOU\_ANYMEM paid for internet or wireless internet access away from home, at places such as cafés, hotels, or airplanes?**  1. Yes  2. No  Skip instructions:  1: Goto INTAWYX  2,DK,RF: Goto S4B\_END |
| 4B | INTAWYX | * New question to pick up amount if INTAWAY=yes * Added “**Since the first of ^REF\_MONTH not including this month – “** | n/a | **Since the first of ^REF\_MONTH not including this month -**  **What was the total amount paid?**  Skip instructions:  Goto **S4B\_END** |

**Section 4C changes – Delete entire section**

| **CEQ Section** | **CEQ CAPI Variable** | **Change Detail** | **201607 Wording/Specification** | **201704 Wording/Specification** |
| --- | --- | --- | --- | --- |
| 4C | S4C\_INTRO | Delete variable | **Now I am going to ask about cable and satellite TV service, satellite radio service, and internet service expenditures.**   1. Enter 1 to continue   Skip instructions:  Goto UTI\_ITEM | Delete variable |
| 4C | UTI\_ITEM | Delete variable  (FYI – satellite radio will be added to Section 17) | **Since the first of ^REF\_MONTH have ^YOU\_ANYMEM had any expenses for . . .**  Read each item on list.   1. Cable or satellite TV services, not already reported? 2. Satellite radio services? 3. Internet connection or an internet service provider, not already reported? 4. Internet services away from home such as web cafes or internet kiosks? 5. None/ no more entries 6. Delete the line   Store instructions:  Assign INTSERV as follows:  If UTI\_ITEM = 1 then set INTSERV = 100  If UTI\_ITEM = 2 then set INTSERV = 700  If UTI\_ITEM = 3 then set INTSERV = 200  If UTI\_ITEM = 4 then set INTSERV = 600  Skip instructions:  1-4: IF UTI\_ITEM ne Item2Shadow then goto CK\_ITEM ELSE goto INTDESC  99: Goto S4C\_END  888: IF no more grid lines then goto S4C\_END ELSE goto UTI\_ITEM - next line of table | Delete variable |
| 4C | INTDESC | Delete variable | **What was the expense for?**  Skip instructions:  **If (INTNMBR=4 AND UTI\_ITEM=3 AND INTPER=201607, 201608, or 201609) goto INTCOMP**  **ELSE** goto INTMO | Delete variable. |
| 4C | INTCOMP | Delete variable | * Ask if not apparent:   **What is the name of the company providing the internet service?**  Skip instructions:  30 characters, DK, REF: goto INTMO | Delete variable. |
| 4C | INTMO | Delete variable | **In what month was the expense?**  Enter 13 for same amount each month of the reference period   1. January 2. February 3. March 4. April 5. May 6. June 7. July 8. August 9. September 10. October 11. November 12. December   Skip instructions:  REF\_MONTH - CUR\_MONTH: IF INTMO is not in then reference period then goto ERR3\_INTMO ELSE goto INTCHGX  13,DK,RF: Goto INTCHGX | Delete variable |
| 4C | INTCHGX | Delete variable | **^INTMO\_FILL**  Skip instructions:  1-999999: IF (UTI\_ITEM = 1 and INTCHGX lt 8 or INTCHGX gt 150) OR (UTI\_ITEM = 2 and INTCHX lt 5 or INTCHGX gt 500) or (UTI\_ITEM = 3 and INTCHGX lt 5 or INTCHGX gt 100) or (UTI\_ITEM = 4 and INTCHGX lt 1 or INTCHGX gt 50) then goto ERR1\_INTCHGX  ELSEIF INTSERV and entry in INTCHGX are equal to any records data on the pre-chart/input file AND (that prechart records INTMO does not equal 13) then goto ERR\_DUP  ELSE goto INTCMB\_S  DK,RF: Goto INTCMB\_S | Delete variable |
| 4C | INTCMB\_S | Delete variable | Enter 'C' for combined expenses.  Skip instructions:  C: Goto INTCMB  EMPTY: Goto INTMORE  IF anything other than a 'C' or 'empty' is entered then goto CK\_C | Delete variable |
| 4C | INTCMB | Delete variable | **What was ^ITEM\_DESC combined with?**  Enter all that apply, separate with commas.   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   Store instructions:  For each item selected in INTCMB, store the appropriate  item code in INTSERV1 through INTSERV4.  (The first entry in INTCMB should be recoded and stored  in INTSERV1, the 2nd entry in INTSERV2, etc.)  Recode as follows:  If INTCMB = 1, store 100.  If INTCMB = 2, store 700  If INTCMB = 3, store 200.  If INTCMB = 4, store 600.  Skip instructions:  Goto INTMORE | Delete variable |
| 4C | INTMORE | Delete variable | **Did you have any other expenses for ^ITEM\_DESC?**   1. Yes 2. No   Skip instructions:  1: IF row number = 40 then goto ERR\_MAX  ELSE goto UTI\_ITEM, next row of table  2,DK,RF: Goto UTI\_ITEM, next row of table | Delete variable |

**Section 4D changes – Rename to 4C**

| **CEQ Section** | **CEQ CAPI Variable** | **Change Detail** | **201607 Wording/Specification** | **201704 Wording/Specification** |
| --- | --- | --- | --- | --- |
| 4D 🡪 4C | S4D\_INTRO | Rename to S4C\_INTRO | **Now I am going to ask about utility bills.**   1. Enter 1 to continue   Skip instructions:  Goto TBLPROPT.Bsection**04d**.UTC\_ITEM | **Now I am going to ask about utility bills.**   1. Enter 1 to continue   Skip instructions:  Goto TBLPROPT.Bsection**04C**.UTC\_ITEM |
| 4D 🡪 4C | TBLPROPT | Rename to section label to Part C and change “Screening and Detailed Questions” to “Utilities, Fuels, and Services” | Block instructions:  2. Section Label: Section 4, **Part D** - **Screening and Detailed Questions** | Block instructions:  2. Section Label: Section 4, **Part C** – **Utilities, Fuels, and Services** |

**Section 5 changes**

| **CEQ Section** | **CEQ CAPI Variable** | **Change Detail** | **201607 Wording/Specification** | **201704 Wording/Specification** |
| --- | --- | --- | --- | --- |
| 5 | WRKDESC | * Update skip instructions to skip S5BCMB\_S for items 1-4 * Update skip instructions due to replacement of CONTRACT with S5\_INCL | **What work was done?**   * The description should be adequate to classify “alteration” “repair”, etc., and to identify in next interview.   Skip instructions:  **IF ITEM= 1, 3, or 5 then goto S5BCMB\_S**  ELSEIF ITEM=2, 4, 6, or 8 then goto TEMPCODE  ELSE goto CRMTYPE | **What work was done?**   * The description should be adequate to classify “alteration” “repair”, etc., and to identify in next interview.   Skip instructions:  **IF ITEM= 1 or 3 goto S5\_INCL**  **ELSEIF ITEM= 5 then goto S5BCMB\_S**  ELSEIF ITEM=2, 4, 6, or 8 then goto TEMPCODE  ELSE goto CRMTYPE |
| 5 | TEMPCODE | * Update skip instructions to skip S5BCMB\_S for items 1-4 * Update skip instructions due to replacement of CONTRACT with S5\_INCL | * Enter the appropriate detailed job code.  1. ^S5a\_Tempcode1 2. ^S5a\_Tempcode2 3. ^S5a\_Tempcode3 4. ^S5a\_Tempcode4 5. ^S5a\_Tempcode5 6. ^S5a\_Tempcode6 7. ^S5a\_Tempcode7 8. ^S5a\_Tempcode8 9. ^S5a\_Tempcode9 10. ^S5a\_Tempcode10   Skip instructions:  **goto S5BCMB\_S** | * Enter the appropriate detailed job code.  1. ^S5a\_Tempcode1 2. ^S5a\_Tempcode2 3. ^S5a\_Tempcode3 4. ^S5a\_Tempcode4 5. ^S5a\_Tempcode5 6. ^S5a\_Tempcode6 7. ^S5a\_Tempcode7 8. ^S5a\_Tempcode8 9. ^S5a\_Tempcode9 10. ^S5a\_Tempcode10   Skip instructions:  **IF ITEM=2,4 goto S5\_INCL**  **ELSE goto S5BCMB\_S** |
| 5 | S5BCMB\_S | Update skip instructions due to deletion of CONTRACT/addition of new question S5\_INCL | Enter 'C' for a combined expense  Skip instructions:  C: Goto S5B\_COMB  EMPTY: **Goto CONTRACT** | Enter 'C' for a combined expense  Skip instructions:  C: Goto S5B\_COMB  EMPTY: **Goto S5\_INCL** |
| 5 | S5B\_COMB | * Remove items 1-4 from list * Update skip instructions due to deletion of CONTRACT/addition of new question S5\_INCL | **What other work was included in this job?**   * Enter all that apply, separate with commas.  1. **Homes under construction** 2. **Building an addition** 3. **Finishing a basement** 4. **Remodeling** 5. Landscaping 6. Building outdoor patios 7. Repair outdoor patios 8. Painting/wallpapering 9. Plastering or paneling 10. Plumbing 11. Electrical work 12. Heat or air conditioning 13. Flooring installation/repair/replacement 14. Insulation 15. Roofing, gutters or downspouts 16. Siding 17. Install/Repair/Replace windows, etc. 18. Masonry, brick or stucco 19. Other improvements or repairs 20. Misc. combined (unable to specify/DK)   Store instructions:  For each item selected in S5B\_COMB, store the appropriate item code in CRMCDB1-**CRMCDB20**. (The first entry in S5B\_COMB should be recoded and stored in CRMCDB1, the second entry in CRMCDB2, etc.) Recode as follows:  **IF S5B\_COMB=1, store 100**  **IF S5B\_COMB=2, store 110**  **IF S5B\_COMB=3, store 120**  **IF S5B\_COMB=4, store 130**  IF S5B\_COMB=5, store 140  IF S5B\_COMB=6, store 150  IF S5B\_COMB=7, store 160  IF S5B\_COMB=8, store 175  IF S5B\_COMB=9, store 190  IF S5B\_COMB=10, store 200  IF S5B\_COMB=11, store 210  IF S5B\_COMB=12, store 220  IF S5B\_COMB=13, store 235  IF S5B\_COMB=14, store 240  IF S5B\_COMB=15, store 260  IF S5B\_COMB=16, store 270  IF S5B\_COMB=17, store 280  IF S5B\_COMB=18, store 290  IF S5B\_COMB=19, store 300  IF S5B\_COMB=77, store 310  Skip instructions:  goto **CONTRACT** | **What other work was included in this job?**   * Enter all that apply, separate with commas.  1. Landscaping 2. Building outdoor patios 3. Repair outdoor patios 4. Painting/wallpapering 5. Plastering or paneling 6. Plumbing 7. Electrical work 8. Heat or air conditioning 9. Flooring installation/repair/replacement 10. Insulation 11. Roofing, gutters or downspouts 12. Siding 13. Install/Repair/Replace windows, etc. 14. Masonry, brick or stucco 15. Other improvements or repairs 16. Misc. combined (unable to specify/DK)   Store instructions:  For each item selected in S5B\_COMB, store the appropriate item code in CRMCDB1-**CRMCDB16**. (The first entry in S5B\_COMB should be recoded and stored in CRMCDB1, the second entry in CRMCDB2, etc.) Recode as follows:  IF S5B\_COMB=5, store 140  IF S5B\_COMB=6, store 150  IF S5B\_COMB=7, store 160  IF S5B\_COMB=8, store 175  IF S5B\_COMB=9, store 190  IF S5B\_COMB=10, store 200  IF S5B\_COMB=11, store 210  IF S5B\_COMB=12, store 220  IF S5B\_COMB=13, store 235  IF S5B\_COMB=14, store 240  IF S5B\_COMB=15, store 260  IF S5B\_COMB=16, store 270  IF S5B\_COMB=17, store 280  IF S5B\_COMB=18, store 290  IF S5B\_COMB=19, store 300  IF S5B\_COMB=77, store 310  Skip instructions:  goto **S5\_INCL** |
| 5 | S5\_INCL | * New question to replace CONTRACT, CRMMATER, and TOOLRENT * Store instructions revised to store ‘2’ if response option not selected | N/A | **Since the first of ^REF\_MONTH, did ^YOU\_YRCU -**   * Read each item on list   Enter all that apply, separate with commas.   1. **Pay someone else to do all or part of the work?** 2. **Purchase any materials, supplies, tools or equipment for doing this job?** 3. **Rent any tools or equipment for doing this job?**   Store instructions:  If S5\_INCL=1, store 1 in CONTRACT ELSE store 2 in CONTRACT  If S5\_INCL=2, store 1 in CRMMATER ELSE store 2 in CRMMATER  If S5\_INCL=3, store 1 in TOOLRENT ELSE store 2 in TOOLRENT  Skip instructions:  IF 1 selected goto CONTRCTX  ELSEIF 2 selected goto SUPPLYX  ELSE goto TOOLX |
| 5 | CONTRACT | Delete question from instrument path and turn into an output only variable that will have values of either ‘1’ or blank | **Did you do this job yourself or did you pay someone else to do all or part of the work?**  1. Self Only  2. Paid or contracted with someone else  3. Both  Skip instructions:  1,DK,RF: Goto CRMMATER  2,3: Goto CNTRCTX3 | Delete question from instrument path and turn into an output only variable that will have values of either ‘1’ or blank |
| 5 | CNTRCTX3 | Delete question | **What did you pay in ^REF\_MONTH to someone else for this job?**  Skip instructions:  Goto CNTRCTX2 | Delete variable |
| 5 | CNTRCTX2 | Delete question | **What did you pay in ^TWO\_MONTH to someone else for this job?**  Skip instructions:  Goto CNTRCTX1 | Delete variable |
| 5 | CNTRCTX1 | Delete question | **What did you pay in ^LAST\_MONTH to someone else for this job?**  Skip instructions:  Goto CNTRCTX0 | Delete variable |
| 5 | CNTRCTX0 | Delete question | **How much was paid this month?**  Skip instructions:  IF (CNTRCTX3 = DK or CNTRCTX2 = DK or CNTRCTX1  = DK or CNTRCTX0 = DK then goto CONTRCTX  ELSEIF ITEM = 1-4, 10-12 or 19 then goto MAJ\_APPL  ELSE goto CRMMATER | Delete variable |
| 5 | CONTRCTX | Update skip instructions due to new question pattern | **Since the first of ^REF\_MONTH, what is the total amount you paid to someone else for this job?**  Skip instructions:  **IF ITEM = 1-4, 10-12 or 19 then goto MAJ\_APPL**  **Else goto CRMMATER** | **Since the first of ^REF\_MONTH, what is the total amount you paid to someone else for this job?**  Skip instructions:  **Goto CONT\_MO** |
| 5 | CONT\_MO | New question to pick up the month or months that the total amount paid during the reference period was made. The months displayed should be those of the reference period (ref month thru current month like other month selection questions) however this month selection question should allow multiple selections (up to all 4 months of the reference period) | N/A | **In what month or months did you pay someone else for this job?**  Enter all that apply, separate with commas.   1. January 2. February 3. March 4. April 5. May 6. June 7. July 8. August 9. September 10. October 11. November 12. December   Store instructions:  Output variables TBD, but perhaps something like CONTMO1 thru CONTMO4 with the values being 01 through 12 (i.e., 01 for January).  Skip instructions:  IF ITEM = 1-4, 10-12 or 19 then goto MAJ\_APPL  ELSEIF S5\_INCL=2 goto SUPPLYX  ELSEIF S5\_INCL=3 goto TOOLRTX  ELSE goto REIMBRS |
| 5 | MAJ\_APPL | Update skip instructions due to deletion of CRMMATER and addition of new S5\_INCL question | **Did any of the cost since ^REF\_MONTH include the cost of any appliances or equipment?**  1. Yes  2. No  Skip instructions:  1: Goto APP\_SCR  2,DK,RF: **Goto CRMMATER** | **Did any of the cost since ^REF\_MONTH include the cost of any appliances or equipment?**  1. Yes  2. No  Skip instructions:  1: Goto APP\_SCR  2,DK,RF: **IF S5\_INCL=2 goto SUPPLYX**  **ELSEIF S5\_INCL=3 goto TOOLRTX**  **ELSE goto REIMBRS** |
| 5 | APP\_SCR | Update skip instructions due to only asking for a total cost for all appliances included and due to new S5\_INCL question | **Which of the following appliances or equipment were included?**  Enter up to six, separate with commas.  1. Cooking stove, range, or oven  2. Microwave oven  3. Refrigerator or home freezer  4. Built-in dishwasher  5. Portable dishwasher  6. Garbage disposal  7. Clothes washer or dryer  8. Range hood  9. Smoke alarms and detectors  10. Window air conditioner  11. Portable cooling and heating equipment  12. Lamps, lighting fixtures, or ceiling fans  13. Other major home appliances and equipment  Skip instructions:  1-13; **Goto APPL\_X1**  DK: **Goto CRMMATER** | **Which of the following appliances or equipment were included?**  Enter up to six, separate with commas.  1. Cooking stove, range, or oven  2. Microwave oven  3. Refrigerator or home freezer  4. Built-in dishwasher  5. Portable dishwasher  6. Garbage disposal  7. Clothes washer or dryer  8. Range hood  9. Smoke alarms and detectors  10. Window air conditioner  11. Portable cooling and heating equipment  12. Lamps, lighting fixtures, or ceiling fans  13. Other major home appliances and equipment  Skip instructions:  1-13; **Goto APPL\_X**  DK: **IF S5\_INCL=2 goto SUPPLYX**  **ELSEIF S5\_INCL=3 goto TOOLRTX**  **ELSE goto REIMBRS** |
| 5 | APPL\_X | New question to pick up the total cost of all appliances included | N/A | **What was the total cost for [(description)/these appliances or equipment]?**  Fill instructions:  If one item is selected in APP\_SCR, fill item description else fill “**these appliances or equipment**”  Skip instructions:  If S5\_INCL=2 goto SUPPLYX  ELSEIF S5\_INCL=3 goto TOOLRTX  ELSE goto REIMBRS |
| 5 | APPL\_X1 | Delete question | **What was the total cost for ^APPL\_X\_FILL?**  Skip instructions:  1-999999: IF there is a second selection in APP\_SCR then goto  APPL\_X2 ELSE goto CRMMATER  DK,RF: IF there is a second selection in APP\_SCR then goto  APPL\_X2  ELSE goto CRMMATER | Delete question. |
| 5 | APPL\_X2 | Delete question | **What was the total cost for ^APPL\_X\_FILL?**  Skip instructions:  1-999999: IF there is a third selection in APP\_SCRthen goto  APPL\_X3 ELSE goto CRMMATER  DK,RF: IF there is a third selection in APP\_SCR then goto  APPL\_X3 ELSE goto CRMMATER | Delete question. |
| 5 | APPL\_X3 | Delete question | **What was the total cost for ^APPL\_X\_FILL?**  Skip instructions:  1-999999: IF there is a fourth selection in APP\_SCR then goto  APPL\_X4 ELSE goto CRMMATER  DK,RF: IF there is a fourth selection in APP\_SCR then goto  APPL\_X4 ELSE goto CRMMATER | Delete question. |
| 5 | APPL\_X4 | Delete question | **What was the total cost for ^APPL\_X\_FILL?**  Skip instructions:  1-999999: IF there is a fifth selection in APP\_SCR then goto  APPL\_X5 ELSE goto CRMMATER  DK,RF: IF there is a fifth selection in APP\_SCR then goto  APPL\_X5 ELSE goto CRMMATER | Delete question. |
| 5 | APPL\_X5 | Delete question | **What was the total cost for ^APPL\_X\_FILL?**  Skip instructions:  1-999999: IF there is a sixth selection in APP\_SCR then goto  APPL\_X6 ELSE goto CRMMATER  DK,RF: IF there is a sixth selection in APP\_SCR then goto  APPL\_X6 ELSE goto CRMMATER | Delete question. |
| 5 | APPL\_X6 | Delete question | **What was the total cost for ^APPL\_X\_FILL?**  Skip instructions:  Goto CRMMATER | Delete question. |
| 5 | CRMMATER | Delete question | **Since the first of ^REF\_MONTH, have ^YOU\_ANYMEM PURCHASED any materials, supplies, tools or equipment for doing this job?**  1. Yes  2. No  Skip instructions:  1: Goto SUPPLYX3  2,DK,RF: Goto TOOLRENT | Delete question. |
| 5 | SUPPLYX3 | Delete question | **What was the total cost for all items ^YOU\_YRCU**  **purchased for this job in ^REF\_MONTH?**  Skip instructions:  Goto SUPPLYX2 | Delete question. |
| 5 | SUPPLYX2 | Delete question | **What was the total cost for all items ^YOU\_YRCU**  **purchased for this job in ^TWO\_MONTH?**  Skip instructions:  Goto SUPPLYX1 | Delete question. |
| 5 | SUPPLYX1 | Delete question | **What was the total cost for all items ^YOU\_YRCU**  **purchased for this job in ^LAST\_MONTH?**  Skip instructions:  Goto SUPPLYX0 | Delete question. |
| 5 | SUPPLYX0 | Delete question | **What was the total cost for all items ^YOU\_YRCU**  **purchased for this job in ^CUR\_MONTH?**  Skip instructions:  IF SUPPLYX3 = D or SUPPLYX2 = D or SUPPLYX1 = D or  SUPPLYX0 = D then goto SUPPLYX  ELSE goto TOOLRENT | Delete question. |
| 5 | SUPPLYX | * Update skip instructions due to deletion of TOOLRENT and addition of new SUPPLYMO * Replace “items” in question wording with “materials, supplies, tools, or equipment” | **Since the first of ^REF\_MONTH, what was the total cost of all items ^YOU\_YRCU purchased for this job?**  Skip instructions:  **Goto TOOLRENT** | **Since the first of ^REF\_MONTH, what was the total cost of all materials, supplies, tools, or equipment ^YOU\_YRCU purchased for this job?**  Skip instructions:  **Goto SUPPLYMO** |
| 5 | SUPPLYMO | New question to pick up the month or months that the total amount paid during the reference period was made. The months displayed should be those of the reference period (ref month thru current month like other month selection questions) however this month selection question should allow multiple selections (up to all 4 months of the reference period) | N/A | **In what month or months did you make these purchases?**  Enter all that apply, separate with commas.   1. January 2. February 3. March 4. April 5. May 6. June 7. July 8. August 9. September 10. October 11. November 12. December   Store instructions:  Output variables TBD, but perhaps something like SUPPLMO1 thru SUPPLMO4 with the values being 01 through 12 (i.e., 01 for January).  Skip instructions:  IF S5\_INCL=3 goto TOOLRTX  ELSE goto REIMBRS |
| 5 | TOOLRENT | Delete question | **Since the first of ^REF\_MONTH, have ^YOU\_ANYMEM RENTED any tools or equipment for doing this job?**  1. Yes  2. No  Skip instructions:  1: Goto TOOLRTX3  2,DK,RF: Goto REIMBRS | Delete question. |
| 5 | TOOLRTX3 | Delete question | **What was the total cost for all items ^YOU\_YRCU rented for this job in ^REF\_MONTH?**  Skip instructions:  Goto TOOLRTX2 | Delete question. |
| 5 | TOOLRTX2 | Delete question | **What was the total cost for all items ^YOU\_YRCU rented for this job in ^TWO\_MONTH?**  Skip instructions:  Goto TOOLRTX1 | Delete question. |
| 5 | TOOLRTX1 | Delete question | **What was the total cost for all items ^YOU\_YRCU rented for this job in ^LAST\_MONTH?**  Skip instructions:  Goto TOOLRTX0 | Delete question. |
| 5 | TOOLRTX0 | Delete question | **What was the total cost for all items ^YOU\_YRCU rented for this job in ^CUR\_MONTH?**  Skip instructions:  IF (TOOLRTX3 = D or TOOLRTX2 = D or TOOLRTX1 = D or  TOOLRTX0 = D ) then goto TOOLRTX  ELSE goto REIMBRS | Delete question. |
| 5 | TOOLRTX | * Update skip instructions due to addition of new TOOL\_MO * Replace “items” in question wording with “tools or equipment” | **Since the first of ^REF\_MONTH, what was the total cost for all items ^YOU\_YRCU rented for this job?**  Skip instructions:  **Goto REIMBRS** | **Since the first of ^REF\_MONTH, what was the total cost for all tools or equipment ^YOU\_YRCUW rented for this job?**  Skip instructions:  **Goto TOOL\_MO** |
| 5 | TOOL\_MO | New question to pick up the month or months that the total amount paid during the reference period was made. The months displayed should be those of the reference period (ref month thru current month like other month selection questions) however this month selection question should allow multiple selections (up to all 4 months of the reference period) | N/A | **In what month or months did you rent these items?**  Enter all that apply, separate with commas.   1. January 2. February 3. March 4. April 5. May 6. June 7. July 8. August 9. September 10. October 11. November 12. December   Store instructions:  Output variables TBD, but perhaps something like TOOLMO1 thru TOOLMO4 with the values being 01 through 12 (i.e., 01 for January).  Skip instructions:  goto REIMBRS |
| 5 | ADVMATX | Update skip instructions to skip S5BCMB\_S for items 1-4 | **What was the total cost of these materials and supplies?**  Skip instructions:  1-999,999: IF lt 8 or gt 3865 then goto ERR1\_ADVMATX ELSE goto S5ACMB\_S  DK, REF: goto S5ACMB\_S | **What was the total cost of these materials and supplies?**  Skip instructions:  1-999,999: IF lt 8 or gt 3865 then goto ERR1\_ADVMATX  **ELSEIF JOBCODE=1-4 goto MATNSPEC**  ELSE goto S5ACMB\_S  DK, REF: **IF JOBCODE=1-4 goto MATNSPEC**  **ELSE** goto S5ACMB\_S |
| 5 | S5A\_COMB | Remove items 1-4 from list | **What other work will be included in this job?**   * Enter all that apply, separate with commas.  1. **Homes under construction** 2. **Building an addition** 3. **Finishing a basement** 4. **Remodeling** 5. Landscaping 6. Building outdoor patios 7. Repair outdoor patios 8. Painting/wallpapering 9. Plastering or paneling 10. Plumbing 11. Electrical work 12. Heat or air conditioning 13. Flooring installation/repair/replacement 14. Insulation 15. Roofing, gutters or downspouts 16. Siding 17. Install/Repair/Replace windows, etc. 18. Masonry, brick or stucco 19. Other improvements or repairs 20. Misc. combined (unable to specify/DK)   Store instructions:  For each item selected in S5A\_COMB, store the appropriate item code in CRMCDA1-**CRMCDA20**. (The first entry in S5A\_COMB should be recoded and stored in CRMCDA1, the second entry in CRMCDA2, etc.) Recode as follows:  **IF S5A\_COMB=1, store 100**  **IF S5A\_COMB=2, store 110**  **IF S5A\_COMB=3, store 120**  **IF S5A\_COMB=4, store 130**  IF S5A\_COMB=5, store 140  IF S5A\_COMB=6, store 150  IF S5A\_COMB=7, store 160  IF S5A\_COMB=8, store 175  IF S5A\_COMB=9, store 190  IF S5A\_COMB=10, store 200  IF S5A\_COMB=11, store 210  IF S5A\_COMB=12, store 220  IF S5A\_COMB=13, store 235  IF S5A\_COMB=14, store 240  IF S5A\_COMB=15, store 260  IF S5A\_COMB=16, store 270  IF S5A\_COMB=17, store 280  IF S5A\_COMB=18, store 290  IF S5A\_COMB=19, store 300  IF S5A\_COMB=77, store 310  Skip instructions:  goto MATNSPEC | **What other work will be included in this job?**   * Enter all that apply, separate with commas.  1. Landscaping 2. Building outdoor patios 3. Repair outdoor patios 4. Painting/wallpapering 5. Plastering or paneling 6. Plumbing 7. Electrical work 8. Heat or air conditioning 9. Flooring installation/repair/replacement 10. Insulation 11. Roofing, gutters or downspouts 12. Siding 13. Install/Repair/Replace windows, etc. 14. Masonry, brick or stucco 15. Other improvements or repairs 16. Misc. combined (unable to specify/DK)   Store instructions:  For each item selected in S5A\_COMB, store the appropriate item code in CRMCDA1-**CRMCDA16**. (The first entry in S5A\_COMB should be recoded and stored in CRMCDA1, the second entry in CRMCDA2, etc.) Recode as follows:  IF S5A\_COMB=5, store 140  IF S5A\_COMB=6, store 150  IF S5A\_COMB=7, store 160  IF S5A\_COMB=8, store 175  IF S5A\_COMB=9, store 190  IF S5A\_COMB=10, store 200  IF S5A\_COMB=11, store 210  IF S5A\_COMB=12, store 220  IF S5A\_COMB=13, store 235  IF S5A\_COMB=14, store 240  IF S5A\_COMB=15, store 260  IF S5A\_COMB=16, store 270  IF S5A\_COMB=17, store 280  IF S5A\_COMB=18, store 290  IF S5A\_COMB=19, store 300  IF S5A\_COMB=77, store 310  Skip instructions:  goto MATNSPEC |

**Section 6B changes**

| **CEQ Section** | **CEQ CAPI Variable** | **Change Detail** | **201607 Wording/Specification** | **201704 Wording/Specification** |
| --- | --- | --- | --- | --- |
| 6B | INSTLSCR | Remove July 2016 outlet test changes | **Were there any additional charges for installation or set-up?**   1. Yes 2. No   Skip instructions:  1: goto INSTLLEX  2, DK, REF: **If (ITEM=21 AND INTNMBR=4 AND INTPER=201607, 201608, or 201609) goto TVSTORE**  **ELSE** goto MORE | **Were there any additional charges for installation or set-up?**   1. Yes 2. No   Skip instructions:  1: goto INSTLLEX  2, DK, REF: goto MORE |
| 6B | INSTLLEX | Remove July 2016 outlet test changes | **How much?**  Skip instructions:  1-99999: If INSTLLEX lt 40 or gt 1000 then goto ERR1\_INSTLLEX ELSE **If (ITEM=21 AND INTNMBR=4 AND INTPER=201607, 201608, or 201609) goto TVSTORE**  **ELSE** goto MORE  DK, REF: **If (ITEM=21 AND INTNMBR=4 AND INTPER=201607, 201608, or 201609) goto TVSTORE**  **ELSE** goto MORE | **How much?**  Skip instructions:  1-99999: If INSTLLEX lt 40 or gt 1000 then goto ERR1\_INSTLLEX ELSE goto MORE  DK, REF: goto MORE |
| 6B | TVSTORE | Delete variable | **Where did you purchase this television?**   * Enter store, website, or company name. If purchased from a private individual, enter “private individual.”   Store instructions:  If ENTRY ends with “.com”, “.Com”, “.cOm”, “.coM”, “.COm", “.CoM”, “.cOM”, or “.COM”, then set TVPURCH=1  Skip instructions:  30 characters: if ENTRY ends with “.com”, “.Com”, “.cOm”, “.coM”, “.COm", “.CoM”, “.cOM”, or “.COM”, then goto MORE  ELSE goto TVPURCH  DK, REF: goto MORE | Delete variable |
| 6B | TVPURCH | Delete variable | * Ask if not apparent:   **Was this purchased online or in-person?**   1. Online 2. In person   Skip instructions:  1, DK, REF: goto MORE  2: goto TVPURLOC | Delete variable |
| 6B | TVPURLOC | Delete variable | **Where is [fill: TVSTORE] located?**   * Enter city and state   TVSTORE fill instructions:  Fill entry from TVSTORE  Skip instructions:  200 characters, DK, REF: goto MORE | Delete variable |

**Section 8B changes**

| **CEQ Section** | **CEQ CAPI Variable** | **Change Detail** | **201607 Wording/Specification** | **201704 Wording/Specification** |
| --- | --- | --- | --- | --- |
| 8B | FURNRNTL | Reword question to mention “**not including this month**” (changes in **red**) | **Since the first of ^REF\_MONTH, have ^YOU\_ANYMEM rented or leased any furniture?**   1. Yes 2. No   Skip instructions:  1: goto FURNRNTX  2, DK, REF: goto REPFURN | **Since the first of ^REF\_MONTH not including this month, have ^YOU\_ANYMEM rented or leased any furniture?**   1. Yes 2. No   Skip instructions:  1: goto FURNRNTX  2, DK, REF: goto REPFURN |
| 8B | FURNRNTX | * Add “**Since the first of ^REF\_MONTH not including this month –** “ in **grey** to the beginning of the question wording * Update skip instructions to reflect deletion of FRNRNTCX (changes in **red**) * Corrected revised skip instructions to include ERR | **What was the total expense?**  Skip instructions:  1-99,999: IF FURNRNTX lt 5 or gt 1340 then goto ERR1\_FURNRNTX  ELSE goto **FRNRNTCX**  DK, RF: goto **FRNRNTCX** | **Since the first of ^REF\_MONTH not including this month –**  **what was the total expense?**  Skip instructions:  1-99,999: IF FURNRNTX lt 5 or gt 1340 then goto ERR1\_FURNRNTX  ELSE goto **REPFURN**  DK, RF: goto **REPFURN** |
| 8B | FRNRNTCX | Delete variable | **How much of the total amount was spent this month?**  Skip instructions:  goto REPFURN | Delete variable. |
| 8B | REPFURN | Reword question to mention “**not including this month**” (changes in **red**) | **Since the first of ^REF\_MONTH, have ^YOU\_ANYMEME had any expenses for repairing, refinishing or reupholstering furniture, including the cost for fabric?**   1. Yes 2. No   Skip instructions:  1: goto REPFURNX  2, DK, REF: goto S8B\_END | **Since the first of ^REF\_MONTH not including this month, have ^YOU\_ANYMEME had any expenses for repairing, refinishing or reupholstering furniture, including the cost for fabric?**   1. Yes 2. No   Skip instructions:  1: goto REPFURNX  2, DK, REF: goto S8B\_END |
| 8B | REPFURNX | * Add “**Since the first of ^REF\_MONTH not including this month –** “ in **grey** to the beginning of the question wording * Update skip instructions to reflect deletion of REPFRNCX (changes in **red**) * Corrected revised skip instructions to include ERR | **What was the total expense?**  Skip instructions:  1-99,999: IF FURNRNTX lt 5 or gt 1340 then goto ERR1\_FURNRNTX  ELSE goto **FRNRNTCX**  DK, RF: goto **FRNRNTCX** | **Since the first of ^REF\_MONTH not including this month -**  **What was the total expense?**  Skip instructions:  1-999,999: IF REPFURNX lt 5 or gt 1900 then goto ERR1\_REPFURNX  ELSE goto **S8B\_END**  DK, RF: goto **S8B\_END** |
| 8B | REPFRNCX | Delete variable | **How much of the total amount was spent this month?**  Skip instructions:  0-999,999: IF REPFRNCX gt REPFRNX then goto CK\_REPFRNCX ELSE goto S8B\_END  DK, RF: goto S8B\_END | Delete variable. |

**Section 9A changes**

| **CEQ Section** | **CEQ CAPI Variable** | **Change Detail** | **201607 Wording/Specification** | **201704 Wording/Specification** |
| --- | --- | --- | --- | --- |
| 9A | CLA\_ITEM | Add store instructions for setting AGESEX for layettes | **SCREEN 1 ---------------------------------------------------------------------------**  **Since the first of ^REF\_MONTH, have ^YOU\_ANYMEM purchased any of the following items either for members of your household or for someone outside your household?**  Read each item on list.   1. Coats, jackets or furs 2. Sport coats, tailored jackets, or blazers 3. Suits 4. Vests 5. Shirts, sweaters, blouses, or tops 6. Pants, jeans or shorts 7. Dresses 8. Skirts 9. Undergarments 10. Hosiery 11. Nightwear or loungewear   **SCREEN 2 ----------------------------------------**  **Have ^YOU\_ANYMEM purchased any --**  Read each item on list.   1. Accessories 2. Swimsuits or warm-up or ski suits 3. Uniforms, for which the cost is not reimbursed 4. Costumes 5. Footwear, including athletic footwear 6. Diapers 7. Layettes 8. Watchers 9. Jewelry   Store instructions:  Set CLOTHYA as follows:  If CLA\_ITEM = 1, store 100 in CLOTHYA.  If CLA\_ITEM = 2, store 110 in CLOTHYA.  If CLA\_ITEM = 3, store 120 in CLOTHYA.  If CLA\_ITEM = 4, store 130 in CLOTHYA.  If CLA\_ITEM = 5, store 145 in CLOTHYA.  If CLA\_ITEM = 6, store 150 in CLOTHYA.  If CLA\_ITEM = 7, store 170 in CLOTHYA.  If CLA\_ITEM = 8, store 180 in CLOTHYA.  If CLA\_ITEM = 9, store 200 in CLOTHYA.  If CLA\_ITEM = 10, store 210 in CLOTHYA.  If CLA\_ITEM = 11, store 220 in CLOTHYA.  If CLA\_ITEM = 12, store 230 in CLOTHYA.  If CLA\_ITEM = 13, store 240 in CLOTHYA.  If CLA\_ITEM = 14, store 250 in CLOTHYA.  If CLA\_ITEM = 15, store 260 in CLOTHYA.  If CLA\_ITEM = 16, store 280 in CLOTHYA  If CLA\_ITEM = 17, store 310 in CLOTHYA  If CLA\_ITEM = 18, store 330 in CLOTHYA  If CLA\_ITEM = 19, store 370 in CLOTHYA  If CLA\_ITEM = 20, store 380 in CLOTHYA  Skip instructions:  1-20: IF ITEM ne Item2Shadow then goto CK\_ITEM  ELSE goto DESCRIPTION  95: Goto next row  99: Goto S9A\_END  888: IF no more rows then goto S9A\_END  ELSE goto ITEM - next row of the table | **SCREEN 1 ---------------------------------------------------------------------------**  **Since the first of ^REF\_MONTH, have ^YOU\_ANYMEM purchased any of the following items either for members of your household or for someone outside your household?**  Read each item on list.   1. Coats, jackets or furs 2. Sport coats, tailored jackets, or blazers 3. Suits 4. Vests 5. Shirts, sweaters, blouses, or tops 6. Pants, jeans or shorts 7. Dresses 8. Skirts 9. Undergarments 10. Hosiery 11. Nightwear or loungewear   **SCREEN 2 ----------------------------------------**  **Have ^YOU\_ANYMEM purchased any --**  Read each item on list.   1. Accessories 2. Swimsuits or warm-up or ski suits 3. Uniforms, for which the cost is not reimbursed 4. Costumes 5. Footwear, including athletic footwear 6. Diapers 7. Layettes 8. Watchers 9. Jewelry   Store instructions:   1. Set CLOTHYA as follows:   If CLA\_ITEM = 1, store 100 in CLOTHYA.  If CLA\_ITEM = 2, store 110 in CLOTHYA.  If CLA\_ITEM = 3, store 120 in CLOTHYA.  If CLA\_ITEM = 4, store 130 in CLOTHYA.  If CLA\_ITEM = 5, store 145 in CLOTHYA.  If CLA\_ITEM = 6, store 150 in CLOTHYA.  If CLA\_ITEM = 7, store 170 in CLOTHYA.  If CLA\_ITEM = 8, store 180 in CLOTHYA.  If CLA\_ITEM = 9, store 200 in CLOTHYA.  If CLA\_ITEM = 10, store 210 in CLOTHYA.  If CLA\_ITEM = 11, store 220 in CLOTHYA.  If CLA\_ITEM = 12, store 230 in CLOTHYA.  If CLA\_ITEM = 13, store 240 in CLOTHYA.  If CLA\_ITEM = 14, store 250 in CLOTHYA.  If CLA\_ITEM = 15, store 260 in CLOTHYA.  If CLA\_ITEM = 16, store 280 in CLOTHYA  If CLA\_ITEM = 17, store 310 in CLOTHYA  If CLA\_ITEM = 18, store 330 in CLOTHYA  If CLA\_ITEM = 19, store 370 in CLOTHYA  If CLA\_ITEM = 20, store 380 in CLOTHYA   1. **If CLA\_ITEM=18, store 05 in AGESEX**   Skip instructions:  1-20: IF ITEM ne Item2Shadow then goto CK\_ITEM  ELSE goto DESCRIPTION  95: Goto next row  99: Goto S9A\_END  888: IF no more rows then goto S9A\_END  ELSE goto ITEM - next row of the table |
| 9A | CLOINOUT | * Skip the age-sex variables for layettes (#17) since layettes are only for infants * Update skip instructions due to deletion of FORWHOM * Updated skip instructions due to replacing FOROUTCU with AGESEX | **Was this (were these) purchased for someone inside or outside of your household?**   1. Inside your household 2. Outside your household 3. Both inside and outside your household   Skip instructions:  1: if CLA\_ITEM=1-**18** then goto FORWHOM  ELSE goto CLOTHMOA  2, 3: if CLA\_ITEM=1-**18** then goto FOROUTCU  ELSE goto CLOTHMOA  DK, RF: goto CLOTHMOA | **Was this (were these) purchased for someone inside or outside of your household?**   1. Inside your household 2. Outside your household 3. Both inside and outside your household   Skip instructions:  **IF CLA\_ITEM = 1-17 then goto AGESEX**  **ELSE goto CLOTHMOA** |
| 9A | FORWHOM | Delete question | **For whom was it purchased?**   * Enter all that apply, separate with commas  1. Person 1 2. Person 2   …   1. Person 30 2. Don’t Know   Skip instructions:  IF more than 1 person selected then goto CLONAME  ELSE goto CLOTHMOA | Delete question. |
| 9A | FOROUTCU | Delete/replace with AGESEX | **For whom was this purchased?**   * Enter all age/sex categories that apply to the purchase, separate with commas.  1. Male 16 and over 2. Female 16 and over 3. Male 2-15 4. Female 2-15 5. Child**ren** under 2 years old 6. Don’t know   Skip instructions:  **40-44, 77: goto CLONAME**  **RF: goto CLOTHMOA** | Delete variable/replace with AGESEX |
| 9A | AGESEX  (new variable) | New/renamed variable to replace FOROUTCU | N/A | * Ask if not apparent   **Was this (Were these) purchased for …**   * Enter all age/sex categories that apply to the purchase, separate with commas.  1. **Man, age** 16 and over 2. **Woman, age** 16 and over 3. **Boy, age** 2 **to** 15 4. **Girl, age** 2 **to** 15 5. Child under 2 years old 6. Don’t know   Store instructions:  **Set AGESEXn**  **Store AGESEX in AGESEX1 – AGESEX6 as follows:**  **IF entry of 1, store 01**  **IF entry of 2, store 02**  **IF entry of 3, store 03**  **IF entry of 4, store 04**  **IF entry of 5, store 05**  **IF entry of 77, store 77 in AGESEX1**  **IF entry of REF, store 98 in AGESEX1**  Skip instructions:  **goto CLOTHMOA** |
| 9A | CLONAME | Delete question | * Enter name of person(s)   Skip instructions:  goto CLOTHMOA | Delete question |
| 9A | CLOCMBA\_S | Remove July 2016 outlet test changes | * Enter ‘C’ for a combined expense   Skip instructions:  C: goto COMBCODE  EMPTY: **If (INTNMBR=4 AND (CLA\_ITEM=110 or 120) AND (INTPER=201607, 201608, or 201609) goto CLASTORE**  **ELSE** goto MORE | * Enter ‘C’ for a combined expense   Skip instructions:  C: goto COMBCODE  EMPTY: goto MORE |
| 9A | CLOCMBA | Remove July 2016 outlet test changes | **What other clothing is ^CLODESCA combined with?**   * Enter all that apply, separate with commas.  1. Coats, jackets, or furs 2. Sport coats, tailored jackets, or blazers 3. Suits 4. Vests 5. Shirts, sweaters, blouses, or tops 6. Pants, jeans, or shorts 7. Dresses 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. Watches 20. Jewelry 21. Misc. combined (unable to specify/DK)   Skip instructions:  **If (INTNMBR=4 AND (CLA\_ITEM=110 or 120) AND (INTPER=201607, 201608, or 201609) goto CLASTORE**  **ELSE** goto MORE | **What other clothing is ^CLODESCA combined with?**   * Enter all that apply, separate with commas.  1. Coats, jackets, or furs 2. Sport coats, tailored jackets, or blazers 3. Suits 4. Vests 5. Shirts, sweaters, blouses, or tops 6. Pants, jeans, or shorts 7. Dresses 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. Watches 20. Jewelry 21. Misc. combined (unable to specify/DK)   Skip instructions:  goto MORE |

**Section 10 changes**

| **CEQ Section** | **CEQ CAPI Variable** | **Change Detail** | **201607 Wording/Specification** | **201704 Wording/Specification** |
| --- | --- | --- | --- | --- |
| 10 | ANYEXTRA | Add fill to question wording for amount picked up in PAYEXPX (changes in **red**) | **Does the payment include any charges other than the lease amount such as auto insurance or maintenance?**   1. Yes 2. No   Skip instructions:  1: goto EXTRAEXP  2, DK, REF: goto ANYEMPLY | **Does the ^PAYEXPX\_FILL payment include any charges other than the lease amount such as auto insurance or maintenance?**   1. Yes 2. No   **Fill instructions:**  **Fill amount entered in PAYEXPX. If DK or REF entered in PAYEXPX, leave blank.**  Skip instructions:  1: goto EXTRAEXP  2, DK, REF: goto ANYEMPLY |

**Section 11 changes**

| **CEQ Section** | **CEQ CAPI Variable** | **Change Detail** | **201607 Wording/Specification** | **201704 Wording/Specification** |
| --- | --- | --- | --- | --- |
| 11 | FUELTYPE | * Updated response list:   + “only” added to “Gasoline”   + “Hybrid electric power” reworded to “Hybrid electric/gasoline”   + New response option “Electric only”   + New response option “FlexFuel/E85” * Updated special instructions and skip instructions due to revised list | **Is it fueled by -**  Read each item on list.   1. **Gasoline?** 2. **Diesel fuel?** 3. **Hybrid electric power?** 4. Other - specify**?**   Special instructions:  Answer list options 1-**3** should be in bold black.  (Answer list option **4** should be regular black)  Skip instructions:  1-**3**,DK,RF: IF BCeintro.BUSCREEN = 2 goto VEHNEWU  ELSE goto VEHBSNS  **4**: Goto FUELOTH | **Is it fueled by -**  Read each item on list.   1. **Gasoline only?** 2. **Diesel fuel?** 3. **Hybrid electric/gasoline?** 4. **Electric only?** 5. **FlexFuel/E85?** 6. Other - specify   Special instructions:  Answer list options 1-**5** should be in bold black.  (Answer list option **6** should be regular black)  Skip instructions:  1-**5**,DK,RF: IF BCeintro.BUSCREEN = 2 goto VEHNEWU  ELSE goto VEHBSNS  **6**: Goto FUELOTH |

**Section 12C changes**

| **CEQ Section** | **CEQ CAPI Variable** | **Change Detail** | **201607 Wording/Specification** | **201704 Wording/Specification** |
| --- | --- | --- | --- | --- |
| 12C | VOPGASX | Update skip instructions for for new VOPELEC question | **Since the first of ^REF\_MONTH not including this month --**  **What has been ^YR\_YRCUS AVERAGE MONTHLY expense for gasoline and other fuels for all vehicles?**  Skip instructions:  0,RF: **Goto VOPOIL**  1-9999: Goto VOPDIES  DK: Goto VOPDIES | **Since the first of ^REF\_MONTH not including this month --**  **What has been ^YR\_YRCUS AVERAGE MONTHLY expense for gasoline and other fuels for all vehicles?**  Skip instructions:  0,RF: **IF there is an inventoried vehicle or a vehicle picked up in the current interview with FUELTYPE=3 or 4 goto VOPELEC**  **ELSE goto Goto VOPOIL**  1-9999: Goto VOPDIES  DK: Goto VOPDIES |
| 12C | VOPDIES | * Remove outlet test changes * Update skip instructions for for new VOPELEC and VOPETH questions | **Was any of this expense for diesel fuel?**   1. Yes 2. No   Skip instructions:  1: goto VOPDIESX  2, DK, RFIf BCEINTRO.BUSCREEN=2 **AND (INTNMBR=4 AND INTPER=201607, 201608, or 201609) goto GASLOC**  **ELSEIF BCEINTRO.BUSCREEN=2** goto VOPOIL  ELSE goto VOPBSNS | **Was any of this expense for diesel fuel?**   1. Yes 2. No   Skip instructions:  1: goto VOPDIESX  2, DK, RF: **IF there is an inventoried vehicle or a vehicle picked up in the current interview with FUELTYPE=5 goto VOPETH**  **ELSEIF (there is an inventoried vehicle or a vehicle picked up in the current interview with FUELTYPE=3 or 4 AND BUSCREEN=2) goto VOPELEC**  **ELSE**IF BCEINTRO.BUSCREEN=2 goto VOPOIL  ELSE goto VOPBSNS |
| 12C | VOPDIESX | * Remove outlet test changes * Update skip instructions for for new VOPELEC and VOPETH questions | **How much?**  Skip instructions:  1-9999: IF (VOPDIESX lt 5 or gt 400) then goto ERR1\_VOPDIESX  ELSEIF (VOPDIESX gt VOPGASX) then goto CK\_VOPDIESX  ELSEIF BCEINTRO.BUSCREEN=2 **AND (INTNMBR=4 AND INTPER=201607, 201608, or 201609) goto GASLOC**  **ELSEIF BCEINTRO.BUSCREEN=2** then goto VOPOIL  ELSE goto VOPBSNS  DK, RF: IF BCEINTRO.BUSCREEN=2 **AND (INTNMBR=4 AND INTPER=201607, 201608, or 201609) goto GASLOC**  **ELSEIF BCEINTRO.BUSCREEN=2** then goto VOPOIL  ELSE goto VOPBSNS | **How much?**  Skip instructions:  1-9999: IF (VOPDIESX lt 5 or gt 400) then goto ERR1\_VOPDIESX  ELSEIF (VOPDIESX gt VOPGASX) then goto CK\_VOPDIESX  **IF there is an inventoried vehicle or a vehicle picked up in the current interview with FUELTYPE=5 goto VOPETH**  **ELSEIF (there is an inventoried vehicle or a vehicle picked up in the current interview with FUELTYPE=3 or 4 AND BUSCREEN=2) goto VOPELEC**  **ELSE**IF BCEINTRO.BUSCREEN=2 then goto VOPOIL  ELSE goto VOPBSNS  DK, RF: **IF there is an inventoried vehicle or a vehicle picked up in the current interview with FUELTYPE=5 goto VOPETH**  **ELSEIF (there is an inventoried vehicle or a vehicle picked up in the current interview with FUELTYPE=3 or 4 AND BUSCREEN=2) goto VOPELEC**  **ELSE**IF BCEINTRO.BUSCREEN=2 then goto VOPOIL  ELSE goto VOPBSNS |
| 12C | VOPETH | New question asked if the household has any vehicles with FUELTYPE=5 | N/A | **Was any of this expense for the purchase of E85?**  1. Yes  2. No  Skip instructions:  1: goto VOPETHX  2, DK, REF: IF (there is an inventoried vehicle or a vehicle picked up in the current interview with FUELTYPE=3 or 4 AND BUSCREEN=2) goto VOPELEC  ELSEIF BUSCREEN = 2 goto VOPOIL  ELSE goto VOPBSNS |
| 12C | VOPETHX | New question asked if the response to new question VOPETH is yes | n/a | **How much?**  Skip instructions:  IF (there is an inventoried vehicle or a vehicle picked up in the current interview with FUELTYPE=3 or 4 AND BUSCREEN=2) goto VOPELEC  ELSEIF BUSCREEN = 2 goto VOPOIL  ELSE goto VOPBSNS |
| 12C | VOPBSNS | * Remove outlet test changes * Updated skip instructions due to new electric vehicle charging questions | **Was any of the AVERAGE MONTHLY cost counted as a business expense?**   1. Yes 2. No   Skip instructions:  1: goto VOPBSPER  2, DK, REF: **IF (INTNMBR=4 AND INTPER=201607, 201608, or 201609) goto GASLOC**  **ELSE** goto VOPOIL | **Was any of the AVERAGE MONTHLY cost counted as a business expense?**   1. Yes 2. No   Skip instructions:  1: goto VOPBSPER  2, DK, REF: **IF (there is an inventoried vehicle or a vehicle picked up in the current interview with FUELTYPE=3 or 4 AND BUSCREEN=2) goto VOPELEC**  **ELSE** goto VOPOIL |
| 12C | VOPBSPER | * Remove outlet test changes * Updated skip instructions due to new electric vehicle charging questions | **What percentage of the AVERAGE MONTHLY COST was counted as a business expense?**  Skip instructions:  1-99, DK, RF: **IF (INTNMBR=4 AND INTPER=201607, 201608, or 201609) goto GASLOC**  **ELSE** goto VOPOIL  100: goto ERR2\_VOPBSPER | **What percentage of the AVERAGE MONTHLY COST was counted as a business expense?**  Skip instructions:  1-99, DK, RF: **IF (there is an inventoried vehicle or a vehicle picked up in the current interview with FUELTYPE=3 or 4 AND BUSCREEN=2) goto VOPELEC**  **ELSE** goto VOPOIL  100: goto ERR2\_VOPBSPER |
| 12C | VOPELEC | New question on whether CU paid for any electric vehicle charging if CU has any vehicles (inventoried or picked up in the current interview) with FUELTYPE=3 or 4 | N/A | **Since the first of ^REF\_MONTH not including this month –**  **Have ^YOU\_ANYMEM paid for electric vehicle charging away from home?**   1. Yes 2. No   Special instructions:  If VOPGASX is 1-9999 or DK then bold black the first line "Since the first of ^REF\_MONTH not including this month --"  Else gray out the line.  Skip instructions:  1: goto VOPELECX  2, DK, REF: goto VOPOIL |
| 12C | VOPELECX | New question asked if response to VOPELEC is yes | N/A | **How much?**  Skip instructions:  IF BUSCREEN = 2 goto VOPOIL ELSE goto VOPELBS |
| 12C | VOPELBS | New follow-up question if response to VOPELEC is yes and BUSCREEN does not equal 2 | N/A | **Was any of this amount counted as a business expense?**   1. Yes 2. No   Skip instructions:  1: Goto VOPELBPR  2,DK,RF: Goto VOPOIL |
| 12C | VOPELBPR | New question asked if response to VOPELBS is yes | N/A | **What percentage of [fill: VOPELECX] was counted as a business expense?**  Skip instructions:  1-99,DK,RF: Goto VOPOIL  100: Goto ERR2\_VOPELPR |
| 12C | GASLOC | Delete variable | **From ^REF\_MONTH through ^LAST\_MONTH, where did ^YOU\_YRCU ^Qtypefill purchase gas?**   * Enter city and state   Qtypefill instructions:  If QTYPE2=1, fill “**last**”  If QTYPE2=2, fill “**most frequently**”  Skip instructions:  200 characters, DK, REF: goto VOPOIL | Delete variable |
| 12C | VOPOIL | Update special instructions due to new VOPELEC question(s) coming in between VOPGASX and VOPOIL | Since the first of ^REF\_MONTH not including this month --  **Have ^YOU\_ANYMEM purchased any oil for operating vehicles?**   1. Yes 2. No   Special instructions:  If VOPGASX is 1-9999 or DK then bold black the first line "Since the first of ^REF\_MONTH not including this month --"  Else gray out the line.  Skip instructions:  1: Goto VOPOILX  2,DK,RF: Goto VOPFLUID | Since the first of ^REF\_MONTH not including this month --  **Have ^YOU\_ANYMEM purchased any oil for operating vehicles?**   1. Yes 2. No   Special instructions:  If **[**VOPGASX is 1-9999 or DK**] OR [VOPELEC=2, DK, or REF]** then bold black the first line "Since the first of ^REF\_MONTH not including this month --"  Else gray out the line.  Skip instructions:  1: Goto VOPOILX  2,DK,RF: Goto VOPFLUID |

**Section 13 changes**

| **CEQ Section** | **CEQ CAPI Variable** | **Change Detail** | **201607 Wording/Specification** | **201704 Wording/Specification** |
| --- | --- | --- | --- | --- |
| (Current) Section 13 | Sections 13A, 13B | Move/re-number the ‘Insurance other than Health’ section to Section 15 (including global prechart, products file, and help file) | Section 13 – Insurance Other than Health  S13 – Non-Health Insurance | Section 15 – Insurance Other than Health  S15 – Non-Health Insurance |

**Previously section 13A now section 15A changes**

| **CEQ Section** | **CEQ CAPI Variable** | **Change Detail** | **201607 Wording/Specification** | **201704 Wording/Specification** |
| --- | --- | --- | --- | --- |
| Previously section 13A now section 15A | TYPE\_F | Remove instruction for long term care (moved to health insurance) | **Store Instructions:**  Prefill with Type of insurance:  IF POLICYYB = 100 then prefill 'Life/disability'  **IF POLICYYB = 110 then prefill 'Long term care'**  IF POLICYYB = 200 then prefill 'Auto/vehicle'  IF POLICYYB = 300 then prefill 'Homeowners' '  IF POLICYYB = 400 then prefill 'Renters' '  IF POLICYYB = 500 then prefill 'Other' | **Store Instructions:**  Prefill with Type of insurance:  IF POLICYYB = 100 then prefill 'Life/disability'  IF POLICYYB = 200 then prefill 'Auto/vehicle'  IF POLICYYB = 300 then prefill 'Homeowners' '  IF POLICYYB = 400 then prefill 'Renters' '  IF POLICYYB = 500 then prefill 'Other' |
| Previously section 13A now section 15A | PLCYSTIL | Remove instruction for long term care (moved to health insurance) | **Do ^YOU\_ANYMEM still have or make payments for the ^PLCYSTIL insurance policy from ^8500INSCOMP?**   1. Yes 2. No   PLCYSTIL Fill instructions:  **IF 8500.POLICYYB = 110, fill "long term care"**  IF 8500.POLICYYB = 100, fill "life or disability"  IF 8500.POLICYYB = 200, fill "auto"  IF 8500.POLICYYB = 300, fill "homeowners'"  IF 8500.POLICYYB = 400, fill "renters'"  IF 8500.POLICYYB = 500, fill "other type of non-health"  **Skip Instructions:**  IF 8500.PREMYOU = 2 then goto S13A\_END  ELSE goto INSEX3A | **Do ^YOU\_ANYMEM still have or make payments for the ^PLCYSTIL insurance policy from ^8500INSCOMP?**   1. Yes 2. No   PLCYSTIL Fill instructions:  IF 8500.POLICYYB = 100, fill "life or disability"  IF 8500.POLICYYB = 200, fill "auto"  IF 8500.POLICYYB = 300, fill "homeowners'"  IF 8500.POLICYYB = 400, fill "renters'"  IF 8500.POLICYYB = 500, fill "other type of non-health"  **Skip Instructions:**  IF 8500.PREMYOU = 2 then goto S13A\_END  ELSE goto INSEX3A |
| Previously section 13A now section 15A | INSEX3A | * Reword question to mention “**not including this month**” * Update skip instructions to account for new questions | **Since the first of ^REF\_MONTH have you had any expenses for this policy?**   1. Yes 2. No   Skip instructions:  1: **goto** **INSEX3AX**  2, DK, RF: goto S13A\_END | **Since the first of ^REF\_MONTH not including this month, have you had any expenses for this policy?**   1. Yes 2. No   Skip instructions:  1: **IF 8500.INSRPMPD=1-9 then goto INSLSTTM ELSE goto INSRPMPA**  2, DK, RF: goto S13A\_END |
| Previously section 13A now section 15A | INSLSTTM | New variable to confirm previous frequency for premium payments | N/A | **Last time, I recorded that payments are made ^INS\_PERIODICITY. Is this still correct?**   1. Yes 2. No   Fill instructions:  (same fill pattern as for PERIODICITY in the health insurance inventory section)  IF 8500.INSRPMPD=1 fill “**once a week**”  ELSEIF 8500.INSRPMPD=2, fill “**once every 2 weeks**”  ELSEIF 8500.INSRPMPD=3, fill “**twice a month**”  ELSEIF 8500.INSRPMPD=4, fill “**once a month**”  ELSEIF 8500.INSRPMPD=5, fill “**every 2 months**”  ELSEIF 8500.INSRPMPD=6, fill “**every 3 months**”  ELSEIF 8500.INSRPMPD=7, fill “**every 4 months**”  ELSEIF 8500.INSRPMPD=8, fill “**every 6 months**”  ELSEIF 8500.INSRPMPD=9, fill “**once a year**”  Skip instructions:  1: goto INSREGXA  2, DK, REF: goto INSRPMPA |
| Previously section 13A now section 15A | INSRPMPA | New variable to pick up frequency for premium payments | N/A | **How often are payments made ^INSanypd\_fill?**   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 10. Other   Fill instructions:  IF 8500.PAYDEDPR=1 fill “**including payroll deductions**” ELSE leave blank.  Skip instructions:  1-9: goto INSREGXA  10, DK, RF: goto INSEX3AX |
| Previously section 13A now section 15A | INSREGXA | New variable to pick up rate payment amount | N/A | **What is the amount currently paid ^INS\_PERIODICITY2?**  Fill instructions:  IF (INSLSTTM=1 and 8500.INSRPMPD=1) OR INSRPMPA=1, fill “**once a week**”  ELSEIF (INSLSTTM=1 and 8500.INSRPMPD=2) OR INSRPMPA=2, fill “**once every 2 weeks**”  ELSEIF (INSLSTTM=1 and 8500.INSRPMPD=3) OR INSRPMPA=3, fill “**twice a month**”  ELSEIF (INSLSTTM=1 and 8500.INSRPMPD=4) OR INSRPMPA=4, fill “**once a month**”  ELSEIF (INSLSTTM=1 and 8500.INSRPMPD=5) OR INSRPMPA=5, fill “**every 2 months**”  ELSEIF (INSLSTTM=1 and 8500.INSRPMPD=6) OR INSRPMPA=6, fill “**every 3 months**”  ELSEIF (INSLSTTM=1 and 8500.INSRPMPD=7) OR INSRPMPA=7, fill “**every 4 months**”  ELSEIF (INSLSTTM=1 and 8500.INSRPMPD=8) OR INSRPMPA=8, fill “**every 6 months**”  ELSEIF (INSLSTTM=1 and 8500.INSRPMPD=1) OR INSRPMPA=1, fill “**once a year**”  Skip instructions:  goto S13A\_END |
| Previously section 13A now section 15A | INSEX3AX | * Add “**Since the first of ^REF\_MONTH not including this month –** “to the beginning of the question wording * Update skip instructions to reflect deletion of INSEXXA * Updates to some of the error range values to make the ranges consistent between INSEX3AX and INSEXPBX * Remove instruction for long term care (moved to health insurance) | **How much was paid?**  Skip instructions:  1-99,999: IF **(8500.POLICYYB=110 and INSEX3AX gt 628) OR**  (8500.POLICYYB=100 and INSEX3AX gt **628**) OR  (8500.POLICYYB=200 and INSEX3AX gt **1050**) OR (8500.POLICYYB=300 and INSEX3AX gt 1000) OR  (8500.POLICYYB=400 and INSEX3AX gt **300**) OR  (8500.POLICYYB=500 and INSEX3AX gt **825**) then goto ERR1\_INSEX3AX  ELSE goto **INSEXXA**  DK, RF: goto S13A\_END | **Since the first of ^REF\_MONTH not including this month, how much was paid?**  Skip instructions:  1-99,999: IF (8500.POLICYYB=100 and INSEX3AX gt **750**) OR  (8500.POLICYYB=200 and INSEX3AX gt **1100**) OR (8500.POLICYYB=300 and INSEX3AX gt 1000) OR  (8500.POLICYYB=400 and INSEX3AX gt **340**) OR  (8500.POLICYYB=500 and INSEX3AX gt **936**) then goto ERR1\_INSEX3AX  ELSE goto **S13A\_END**  DK, RF: goto S13A\_END |
| Previously section 13A now section 15A | INSEXXA | * Delete variable. | **How much was paid this month?**  Skip instructions:  0-99,999: IF (8500.POLICYYB=110 and INSEXXA gt 300) OR  (8500.POLICYYB=100 and INSEXXA gt 300) OR  (8500.POLICYYB=200 and INSEXXA gt 670) OR  (8500.POLICYYB=300 and INSEXXA gt 688) OR  (8500.POLICYYB=400 and INSEXXA gt 186) OR  (8500.POLICYYB=500 and INSEXXA gt 600) then goto ERR1\_INSEXXA  ELSEIF INSEXXA gt INSEX3AX then goto CK\_INSEXXA  ELSE goto S13A\_END  DK, RF: goto S13A\_END | Delete variable. |

**Previously section 13B now section 15B changes**

| **CEQ Section** | **CEQ CAPI Variable** | **Change Detail** | **201607 Wording/Specification** | **201704 Wording/Specification** |
| --- | --- | --- | --- | --- |
| Previously section 13B now section 15B | INB\_ITEM | * Remove long term care (moved to health insurance) * Update INB\_ITEM\_FILL instructions to include new CU with INTNMBR=1 wording | **^INB\_ITEM\_FILL**   * Read each item on list  1. **Long term care insurance?** 2. **Life insurance or other policies which provide benefits in case of death or disability?** 3. **Homeowners' insurance?** 4. **Renters' insurance?** 5. **Automobile or other vehicle insurance?** 6. **Other types of non-health insurance?**   INB\_ITEM\_FILL **I**nstructions:  IF INTNMBR = 1, fill"**Do ^YOU\_ANYMEM have any or pay for any -**" ELSE fill "**Since the first of ^REF\_MONTH have ^YOU\_ANYMEM purchased or begun paying for any**"  **Store Instructions:** 1. Set up POLICYYB as follows:  **If ITEM = 1, store 110 in POLICYYB**  If ITEM = **2**, store 100 in POLICYYB  If ITEM = **3**, store 300 in POLICYYB  If ITEM = **4**, store 400 in POLICYYB  If ITEM = **5**, store 200 in POLICYYB  If ITEM = **6**, store 500 in POLICYYB  **Special Instructions:**  2. Pre-fill the PREFIL and INSDESC fields  (Gray the PREFIL field)  **If ITEM = 1, prefill "Long term care"**  If ITEM = **2**, prefill "Life"  If ITEM = **3**, prefill "Homeowners'"  If ITEM = **4**, prefill "Renters"  If ITEM = **5**, prefill "Automobile"  If ITEM = **6**, prefill "Other non-health insurance"  **Skip Instructions:**  1-**6**: IF ITEM ne Item2Shadow then goto CK\_ITEM ELSE goto INSCOMP  99: Goto S13B\_END  888: IF no more rows in the table then goto S13B\_END ELSE goto ITEM - next row of the table | **^INB\_ITEM\_FILL**   * Read each item on list  1. **Life insurance or other policies which provide benefits in case of death or disability?** 2. **Homeowners' insurance?** 3. **Renters' insurance?** 4. **Automobile or other vehicle insurance?** 5. **Other types of non-health insurance?**   INB\_ITEM\_FILL **I**nstructions:  IF INTNMBR = 1 **or new CU**, fill"**Do ^YOU\_ANYMEM have any or pay for any -**" ELSE fill "**Since the first of ^REF\_MONTH have ^YOU\_ANYMEM purchased or begun paying for any**"  **Store Instructions:** 1. Set up POLICYYB as follows:  If ITEM = **1**, store 100 in POLICYYB  If ITEM = **2**, store 300 in POLICYYB  If ITEM = **3**, store 400 in POLICYYB  If ITEM = **4**, store 200 in POLICYYB  If ITEM = **5**, store 500 in POLICYYB  **Special Instructions:**  2. Pre-fill the PREFIL and INSDESC fields  (Gray the PREFIL field)  If ITEM = **1**, prefill "Life"  If ITEM = **2**, prefill "Homeowners'"  If ITEM = **3**, prefill "Renters"  If ITEM = **4**, prefill "Automobile"  If ITEM = **5**, prefill "Other non-health insurance"  **Skip Instructions:**  1-**5**: IF ITEM ne Item2Shadow then goto CK\_ITEM ELSE goto INSCOMP  99: Goto S13B\_END  888: IF no more rows in the table then goto S13B\_END ELSE goto ITEM - next row of the table |
| Previously section 13B now section 15B | INSDESC | Update ITEM number in skip instructions (due to deleting/moving long term care insurance) | **Briefly describe the policy.**  **Skip Instructions:** IF ITEM = **3** then goto INSPROP  ELSE goto PREMYOU | **Briefly describe the policy.**  **Skip Instructions:** IF ITEM = **2** then goto INSPROP  ELSE goto PREMYOU |
| Previously section 13B now section 15B | PAYDEDPR | * Update skip instructions for new question pattern * Revised order (to match part A) | **Are any premiums paid through payroll deductions?**   1. Yes 2. No   Skip instructions:  goto **INSEXPBX** | **Are any premiums paid through payroll deductions?**   1. Yes 2. No   Skip instructions:  goto **INSRPMPD** |
| Previously section 13B now section 15B | INSRPMPD | * New variable to pick up rate frequency * Revised order & wording (to match part A) | N/A | **How often are payments made ^paydeduct**   1. Once a week 2. Once every 2 weeks 3. Twice a month 4. Once a month 5. Every two months 6. Quarterly (every 3 months) 7. Once every 4 months 8. Twice a year (every six months) 9. Once a year 10. Other   Fill instructions:  IF PAYDEDPR = 1 then fill “**including payroll deductions?**”  ELSE fill “**?**”  Skip instructions:  1-9: goto INSRPMXB  10: goto INSEXPBX |
| Previously section 13B now section 15B | INSRPMXB | * New variable to pick up rate amount ($) * Revised order & wording (to match part A) | N/A | **What is the amount currently paid ^insrpmpd ^paydeduct**  iNSRPMPD fill instructions:  IF INSRPMPD=1 fill “once a week”  ELSEIF INSRPMPD=2 fill ”once every 2 weeks”  ELSEIF INSRPMPD=3 fill ”twice a month”  ELSEIF INSRPMPD=4 fill ”once a month”  ELSEIF INSRPMPD=5 fill ”once every 2 months”  ELSEIF INSRPMPD=6 fill ”once every 3 months”  ELSEIF INSRPMPD=7 fill ”once every 4 months”  ELSEIF INSRPMPD=8 fill ”once every 6 months”  ELSEIF INSRPMPD=8 fill ”once a year”  Paydeduct fill instructions:  IF PAYDEDPR = 1 then fill “**including payroll deductions?**”  ELSE fill “**?**”  Skip instructions:  goto C |
| Previously section 13B now section 15B | INSEXPBX | * Reword question to mention “**not including this month**” (changes in **red**) * Update skip instructions due to deletion of INSEXXB * Update skip instructions due to deleting/moving long term care | **Since the first of ^REF\_MONTH, what was ^YR\_YRCUS total expense for this insurance policy?**   * Enter the actual amount the household paid. Do not include any expenses paid for the household by others.   Skip instructions:  1-99,999: IF **(ITEM=1 and INSEXPBX gt 750) OR**  (ITEM=**2** and INSEXPBX gt 750) OR  (ITEM=**3** and INSEXPBX gt 1000) OR  (ITEM=**4** and INSEXPBX gt 340) OR  (ITEM=**5** and INSEXPBX gt 1100) OR  (ITEM=**6** and INSEXPBX gt 936) then goto ERR1\_INSEXPBX  ELSE goto **INSEXXB**  0, DK, RF: goto C | **Since the first of ^REF\_MONTH not including this month, what was ^YR\_YRCUS total expense for this insurance policy?**   * Enter the actual amount the household paid. Do not include any expenses paid for the household by others.   Skip instructions:  1-99,999: : IF (ITEM=**1** and INSEXPBX gt 750) OR  (ITEM=**2** and INSEXPBX gt 1000) OR  (ITEM=**3** and INSEXPBX gt 340) OR  (ITEM=**4** and INSEXPBX gt 1100) OR  (ITEM=**5** and INSEXPBX gt 936) then goto ERR1\_INSEXPBX  ELSE goto **C**  DK, RF: goto C |
| Previously section 13B now section 15B | INSEXXB | Delete variable. | **How much was paid this month?**  Skip instructions:  1-99,999: IF (ITEM=1 and INSEXXB gt 300) OR  (ITEM=2 and INSEXXB gt 300) OR  (ITEM=3 and INSEXXB =1-8 or gt 677) OR  (ITEM=4 and INSEXXB =1-5 or gt 267) OR  (ITEM=5 and INSEXXB =1-17 or gt 663) OR  (ITEM=6 and INSEXXB =1-5 or gt 799) then goto ERR1\_INSEXXB  ELSEIF INSEXXB gt INSEXPBX then goto CK\_INSEXXB  ELSE goto C  0, DK, RF: goto C | Delete variable. |
| Previously section 13B now section 15B | S13CMB | Delete/move long term care and make other associated updates | **What other type of policy is the ^CombCode\_Fill 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 3. Homeowners' insurance 4. Renters' insurance 5. Automobile or other vehicle insurance 6. Other types of non-health insurance 7. Misc. combined (unable to specify/DK)   CombCode\_Fill Instructions:  **If ITEM = 1, fill " long term care insurance"**  If ITEM = **2**, fill "**life or disability insurance**"  If ITEM = **3**, fill "**homeowners' insurance**"  If ITEM = **4**, fill "**renters' insurance**"  If ITEM = **5**, fill "**vehicle insurance**"  If ITEM = **6**, fill "**other type of non-health insurance**"  **Store Instructions:** For each item selected in COMBCODE, store the appropriate item code in INSCMB1- INSCMB**7**.  (The first entry in S13CMB should be recoded and stored in INSCMB1, the 2nd entry in INSCMB, etc.)  Recode as follows:  **If COMBCODE = 1, store 110**  If COMBCODE = **2**, store 100  If COMBCODE = **3**, store 300  If COMBCODE = **4**, store 400  If COMBCODE = **5**, store 200  If COMBCODE = **6**, store 500  If COMBCODE = 77, store 900.  **Skip Instructions:** IF **3** is selected then goto COMBPROP  ELSE goto MORE | **What other type of policy is the ^CombCode\_Fill combined with?**   * Enter all that apply, separate with commas.  1. Life insurance or other policies which provide benefits in case of death or disability 2. Homeowners' insurance 3. Renters' insurance 4. Automobile or other vehicle insurance 5. Other types of non-health insurance 6. Misc. combined (unable to specify/DK)   CombCode\_Fill Instructions:  If ITEM = **1**, fill "**life or disability insurance**"  If ITEM = **2**, fill "**homeowners' insurance**"  If ITEM = **3**, fill "**renters' insurance**"  If ITEM = **4**, fill "**vehicle insurance**"  If ITEM = **5**, fill "**other type of non-health insurance**"  **Store Instructions:** For each item selected in COMBCODE, store the appropriate item code in INSCMB1- INSCMB**6**.  (The first entry in S13CMB should be recoded and stored in INSCMB1, the 2nd entry in INSCMB, etc.)  Recode as follows:  If COMBCODE = **1**, store 100  If COMBCODE = **2**, store 300  If COMBCODE = **3**, store 400  If COMBCODE = **4**, store 200  If COMBCODE = **5**, store 500  If COMBCODE = 77, store 900.  **Skip Instructions:** IF **2** is selected then goto COMBPROP  ELSE goto MORE |
| Previously section 13B now section 15B | INSMORE | Update EX\_MORE\_FILL instructions to include new CU with INTNMBR=1 wording | **^EX\_MORE\_FILL**   1. Yes 2. No   EX\_MORE\_FILL Instructions:  IF INTNMBR = 1 fill: "**Do ^You\_Anymem have any or make payments for any other ^inbdescription policy?**”ELSE fill: "**Did ^you\_Anymem purchase or begin paying for any other ^inbdescription policy?**”  **Skip Instructions:** 1: IF Row number = 100 then goto ERR\_MAX ELSE goto ITEM, next row of the table  2,DK,RF: IF Row number = 100 then goto S13B\_END ELSE goto ITEM, next row of the table | **^EX\_MORE\_FILL**   1. Yes 2. No   EX\_MORE\_FILL Instructions:  IF INTNMBR = 1 **or new CU** fill: "**Do ^You\_Anymem have any or make payments for any other ^inbdescription policy?**”ELSE fill: "**Did ^you\_Anymem purchase or begin paying for any other ^inbdescription policy?**”  **Skip Instructions:** 1: IF Row number = 100 then goto ERR\_MAX ELSE goto ITEM, next row of the table  2,DK,RF: IF Row number = 100 then goto S13B\_END ELSE goto ITEM, next row of the table |

**Section 14 changes**

| **CEQ Section** | **CEQ CAPI Variable** | **Change Detail** | **201607 Wording/Specification** | **201704 Wording/Specification** |
| --- | --- | --- | --- | --- |
| (Current) Section 14/ New section 13 | Sections 14A, 14B, 14C | Move/re-number the ‘Health Insurance’ section to Section 13 (including global prechart, products file, and help file) | Section 14 – Health Insurance  S14 – Health Insurance | Section 13 – Health Insurance  S13 – Health Insurance |

**New Health Insurance Section Intro**

| **CEQ CAPI Variable** | **Detail/Description** | **201704 Wording/Specification** |
| --- | --- | --- |
| S13\_INTRO | New section intro language | **The next questions are about health insurance. Include health insurance obtained through employment or purchased directly as well as government programs like Medicare and Medicaid that provide Medical care or help pay medical bills.**  Skip instructions:  IF there are any inventory records goto the appropriate inventory block:   * IF there are Medicare inventory records goto Medicare inventory block * ELSEIF there are 8500.MEDICAID=1 OR 8500.CHIP=1 OR 8500.IHS=1 goto Medicaid/CHIP/IHS inventory block * ELSEIF there are single service or private insurance inventory records goto their inventory block * ELSEIF 8500.MILITARY=1 goto their inventory block   ELSE goto screener block for new policies/coverage (detailed section) |

**New Health Insurance Section Inventory Part(s)**

| **CEQ CAPI Variable** | **Detail/Description (Inventory)** | **201704 Wording/Specification (Inventory)** |
| --- | --- | --- |
| Medicare inventory block |  | Goto first person with an inventory record of 8500. MEDICARE=1 |
| MDCRSTLL | Question asking whether inventoried person still has Medicare | **[fill: Is ^Name/Are you] still enrolled in Medicare?**   1. Yes 2. No   Skip instructions:  1: goto MCCHOICA  2, DK, REF: goto MDCRSTLL for next person with 8500.MEDICARE=1  ELSEIF there are no more members with 8500.MEDICARE=1 goto end of Medicare inventory block |
| MCCHOICA | Question on whether inventoried person has/still has a Medicare Advantage plan | **[fill: Medicare Advantage is the new name for Medicare Plus Choice plans.] [fill: Are you/Is ^NAME] ^still enrolled in a Medicare Advantage plan?**  \* Enter ‘YES’ if the member changed to a different Medicare Advantage plan.   1. Yes 2. No   Fill instructions:  If 8500.MCCHOICE=1 leave blank else fill “**Medicare Advantage is the new name for Medicare Plus Choice plans.**”]  If 8500.MCCHOICE=1 fill “**still**” else leave blank  If 8500.MCCHOICE=1 fill “\* Enter ‘YES’ if the member changed to a different Medicare Advantage plan.”  Skip instructions:  1: goto MCPREMA  2, DK, REF: goto MCCHMOPLA |
| MCHMOPLA | Question on whether inventoried person has/still has a Medicare HMO plan | **[fill: Are you/Is ^NAME] ^still under a Medicare managed care arrangement, such as an HMO, that is, a Health Maintenance Organization? (With an HMO, you must generally receive care from HMO doctors, otherwise the expense is not covered unless you were referred by the HMO or there was a medical emergency.)**  \* Enter ‘YES’ if the member changed to a different Medicare HMO plan.   1. Yes 2. No   Fill instructions:  If 8500. MCHMOPLN =1 fill “**still**” else leave blank  If 8500. MCHMOPLN =1 fill “\* Enter ‘YES’ if the member changed to a different Medicare HMO plan.”  1: goto MCPREMA  2, DK, REF: if MCCHOICA=1 goto MCPREMA  ELSE goto MCPARTDA |
| MCPREMA | Question on whether inventoried person pays/still pays a premium for Medicare Advantage/Medicare HMO plan | **Besides [fill: your/NAME’s] Medicare Part B payment, [fill: are you/is NAME] ^still paying a premium for [fill: your/his/her] [fill: Medicare Advantage/Medicare HMO] plan?**   1. Yes 2. No   Fill instructions:  If 8500.MCPREM=1 fill “**still**” else leave blank  If MCCHOICA=1 fill “**Medicare Advantage**” else fill “**Medicare HMO**”  Skip instructions:  1: goto MCPRPTCA  2, DK, REF: goto MCPARTDA |
| MCPRPTCA | Question to pick up premium amount | **What is [fill: your/NAME’s] monthly premium for [fill: your/his/her] [fill: Medicare Advantage/Medicare HMO] plan?**  Fill instructions:  If MCCHOICA=1 fill “**Medicare Advantage**” else fill “**Medicare HMO**”  Skip instructions:  goto MCPARTDA |
| MCPARTDA | Question on whether inventoried person has/still has Medicare Part D | **[fill: Are you/Is ^NAME] ^still enrolled in Medicare Part D, also known as the Medicare Prescription Drug Plan?**  \* Enter ‘YES’ if the member changed to a different Medicare Part D plan.   1. Yes 2. No   Fill instructions:  If 8500.MCPARTD=1 fill “**still**” else leave blank  Skip instructions:  1: goto MCPRPTDA  2, DK, REF: goto MDCRSTLL for the next person with 8500.MEDICARE=1  ELSE goto end of Medicare inventory block |
| MCPRPTDA | Question to pick up premium for Medicare Part D | **What is [fill: your/NAME’s] monthly premium for [fill: your/his/her] Medicare Part D prescription drug plan?**  Skip instructions:  goto MDCRSTLL for the next person with 8500.MEDICARE=1  ELSE goto end of Medicare inventory block |
| End of inventory block for Medicare |  | Skip instructions:  IF there are 8500.MEDICAID=1 OR 8500.CHIP=1 OR 8500.IHS=1 goto Medicaid/CHIP/IHS inventory block  ELSE If there are any inventory records of single service plans or private plans goto their inventory block  ELSE if there are any inventory records of military health care goto its inventory block  ELSE goto screener block for new coverage |
| Medicaid/CHIP/IHS inventory block |  | Skip instructions:  IF 8500.MEDICAID=1 goto MDCDSTLL  ELSEIF 8500.CHIP=1 goto CHIPSTLL  ELSEIF 8500.IHS=1 goto IHSSTLL  ELSE goto end of Medicaid/CHIP/IHS block |
| MDCDSTLL | Question on whether household still has Medicaid | **Are/Is ^YOU\_YRCU still covered by Medicaid^MDCDSTfill?**   1. Yes 2. No   Skip instructions:  1: goto MEDPREMA  2, DK, REF: IF 8500.CHIP=1 goto CHIPSTLL  ELSEIF 8500.IHS=1 goto IHSSTLL  ELSE goto end of Medicaid/CHIP/IHS block |
| MEDPREMA | Question on whether household pays/still pays a premium for Medicaid (apparently some states charge small fees for Medicaid) | **[fill: A health insurance premium is the amount you or a family member pays each month for healthcare coverage.] Do ^YOU\_ANYMEM ^still pay a premium for your Medicaid plan?**   1. Yes 2. No   Fill instructions:  If 8500.MEDPREM=1 leave blank else fill “**A health insurance premium is the amount you or a family member pays each month for healthcare coverage.**”  If 8500.MEDPREM=1 fill “**still**” else leave blank  Skip instructions:  1: goto MDCDPRXA  2, DK, REF: IF 8500.CHIP=1 goto CHIPSTLL  ELSEIF 8500.IHS=1 goto IHSSTLL  ELSE goto end of Medicaid/CHIP/IHS block |
| MDCDPRXA | Question to pick up monthly premium if household is charged a fee for their Medicaid | **What is the monthly premium for this Medicaid plan?**  Skip instructions:  IF 8500.CHIP=1 goto CHIPSTLL  ELSEIF 8500.IHS=1 goto IHSSTLL  ELSE goto end of Medicaid/CHIP/IHS block |
| CHIPSTLL | * Question on whether household is still covered by CHIP * Use current ST\_CHIP fill | **Are/Is ^YOU\_YRCU still covered by the Children’s Health Insurance Program (CHIP)^ST\_CHIP?**   1. Yes 2. No   Skip instructions:  1: goto CHIPRMA  2, DK, REF: IF 8500.IHS=1 goto IHSSTLL  ELSE goto end of Medicaid/CHIP/IHS block |
| CHIPRMA | Question on whether household pays/still pays a premium for CHIP coverage | **[fill: A health insurance premium is the amount you or a family member pays each month for healthcare coverage.] Do ^YOU\_ANYMEM ^still pay a premium for your CHIP^ST\_CHIP plan?**   1. Yes 2. No   Fill instructions:  If 8500. STRFPRM1=1 leave blank else fill “**A health insurance premiums is the amount you or a family member pays each month for healthcare coverage.**”  If 8500. STRFPRM1=1 fill “**still**” else leave blank  Skip instructions:  1: goto MDCDPRMA  2, DK, REF: IF 8500.IHS=1 goto IHSSTLL  ELSE goto end of Medicaid/CHIP/IHS block |
| CHIPPRXA | Question to pick up premium for CHIP | **What is the monthly premium for this CHIP^ST\_CHIP plan?**  Skip instructions:  IF 8500.IHS=1 goto IHSSTLL  ELSE goto end of Medicaid/CHIP/IHS block |
| IHSSTLL | Question on whether household is still covered by IHS | **Are/Is ^YOU\_YRCU still covered by the Indian Health Service (IHS)?**   1. Yes 2. No   Skip instructions:  goto end of Medicaid/CHIP/IHS block |
| End of Medicaid, CHIP, and IHS block |  | Skip instructions:  IF there are any inventory records of single service plans or private plans goto their inventory block  ELSEIF there are any inventory records of military health care goto the military inventory block  ELSE goto screener block for new coverage |
| Single service/private insurance inventory block |  | Skip instructions:  Goto HHISTILL for first policy on inventory |
| HHISTILL | Same as in current 14A | **^DoDoes\_C ^YOU\_YRCU still have your [fill:^SSTYPE2/^PLNMGD] policy from ^8500HINSCMP?**   1. Yes 2. No   Skip instructions:  IF 8500.HHIPRYOU=2 goto end of single service/private insurance inventory block  ELSE goto HHIANYPD |
| HHIANYPD | Same as in current 14A | **Since the first of ^REF\_MONTH, have ^YOU\_ANYMEM made any payments on this policy ^HHIANYPD\_FILL?**   1. Yes 2. No   Fill instructions:  If 8500.HHIPRDED=1, fill “**including payroll deductions**” ELSE leave blank  Skip instructions:  IF 8500.HHIRPMPD=1-9 then goto HHILSTTM  ELSE goto HHIRPMPA |
| HHILSTTM | Same as in current 14A | **Last time, I recorded that payments are made ^PERIODICITY. Is this still correct?**   1. Yes 2. No   Skip instructions:  1: goto HHIREGXA  2, DK, REF: goto HHIRPMPA |
| HHIRPMPA | Same as in current 14A | **How often are payments made ^HHIANYPD\_FILL?**   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 10. Other   Skip instructions:  1-9: goto HHIREGXA  10, DK, REF: goto HHIPDAMT |
| HHIREGXA | Same as in current 14A | **What is the amount currently paid ^PERIODICITY2?**  Skip instructions:  Goto end of single service/private insurance inventory block |
| HHIPDAMT | Same as in current 14A | **How much was paid since the first of ^REF\_MONTH not including this month?**  Skip instructions:  Goto end of single service/private insurance inventory block |
| End of single service/private insurance inventory block |  | Goto next policy on inventory  ELSEIF there are no more policies on inventory:   * IF 8500.MILITARY=1 goto the military inventory block * ELSE goto screener block for new coverage |
| Military inventory block |  | Skip instructions:  IF 8500.MILOTHR=1 goto MILOTSTL  ELSEIF 8500.VACHAMP=1 goto MILVASTL  ELSEIF 8500.TRICARE goto TRICRSTL  ELSE goto end of military inventory block |
| MILOTSTL | Question asking whether household is still covered by other type of military health care specified in MILSPCOT | **Are/Is ^YOU\_YRCU still covered by [fill: MILSPCOT]?**   1. Yes 2. No   Skip instructions:  ELSEIF 8500.VACHAMP=1 goto MILVASTL  ELSEIF 8500.TRICARE goto TRICRSTL  ELSE goto end of military inventory block |
| MILVASTL | Question on whether household is still covered by VA, CHAMPVA, or both | **Are/Is ^YOU\_YRCU still covered by [fill: VA/CHAMP-VA/VA or CHAMPVA]?**   1. Yes 2. No   Skip instructions:  ELSEIF 8500.TRICARE goto TRICRSTL  ELSE goto end of military inventory block |
| TRICRSTL | Question on whether household is still covered by Tricare | **Are/Is ^YOU\_YRCU still covered by fill: Tricare?**   1. Yes 2. No   Skip instructions:  1: goto TRIANYPD  2, DK, REF: goto end of military inventory block |
| TRIIANYPD | Question on whether household has made any payments for Tricare (similar to current HHIANYPD in 14A) | **Since the first of ^REF\_MONTH, have ^YOU\_ANYMEM made any payments for Tricare including any payroll deductions?**   1. Yes 2. No   Skip instructions:  IF 8500.TRIRPMPD=1-9 then goto TRILSTTM  ELSE goto TRIRPMPA |
| TRILSTTM | Question on whether payment periodicity is still the same as last recorded (similar to current HHILSTTM in 14A) | **Last time, I recorded that payments are made ^PERIODICITY. Is this still correct?**   1. Yes 2. No   Skip instructions:  1: goto TRIREGXA  2, DK, REF: goto TRIRPMPA |
| TRIRPMPA | Question on what is the current payment periodicity (same as current HHIRPMPA) | **How often are payments made including any payroll deductions?**   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 10. Other   Skip instructions:  1-9: goto TRIREGXA  10, DK, REF: goto TRIPDAMT |
| TRIREGXA | Question on amount paid per periodicity (similar to current HHIREGXA) | **What is the amount currently paid ^PERIODICITY2?**  Skip instructions:  goto end of military inventory block |
| TRIPDAMT | Question on amount paid in reference period (since ‘other’, DK, or REF selected in periodicity) – same as current HHIPDAMT | **How much was paid since the first of ^REF\_MONTH not including this month?**  Skip instructions:  goto end of military inventory block |
| End of military inventory block |  | Skip instructions:  Go to beginning of detailed part (screening) |

**New Health Insurance Section Detailed Part(s) - Screening**

| **CEQ CAPI Variable** | **Detail/Description (Detailed)** | **201704 Wording/Specification (Detailed Part)** |
| --- | --- | --- |
| FHICOV | New screener question for the beginning of this screener section.  If yes/DK/REF, go to HIKIND.  If No, goto the Medicare probe if someone in HH is of Medicare age and there are no inventory records for Medicare. Otherwise, goto Medicaid probe if there are no inventory records for any type of health insurance coverage. Otherwise, go to end of this detailed block (i.e., end of section). | **^FHICOV**   1. Yes 2. No   Fill instructions:  If there are any existing inventory records, fill “**Other than the health care coverage we have already reviewed, are ^YOU\_ANYMEM covered by any additional kinds of health insurance or health care plans? Include policies paid for someone outside your household.**”  ELSE fill “**Are ^YOU\_ANYMEM covered by any kind of health insurance or some other kind of health care plan? Include policies paid for someone outside your household.**”  Skip instructions:  1, DK, REF: goto HIKIND  2: IF (AGE ge 65 for at least 1 HH member AND there are no inventory records for Medicare) goto MCAREPRB  ELSEIF there are no inventory records for health insurance of any type goto MCAIDPRB  ELSE goto end of screener block |
| HIKIND | New select all that apply screener questions that will determine which types of health insurance to ask about.  Note that #3 (Medicare supplemental insurance) cannot be selected without #2 (Medicare) unless there is an inventory record for at least one HH member for Medicare.  If Medicare (#2) is not selected and there aren’t any inventory records for any HH members for Medicare and there is at least one HH member of Medicare age (65 or older), then the next question will be the Medicare probe.  If the rules for the Medicare probe do not apply and no options are selected in 1-8 (i.e., either 9 is selected or DK/REF entered) and there are no inventory records of any type of health insurance coverage, then the instrument will next goto the Medicaid probe.  If the rules for the Medicare or Medicaid probes do not apply and there are selections made in 1-8 that do not include #8 (single service plan), then goto single service probe next.  Otherwise, goto end of screener block | **What ^other kind of health insurance or health care coverage ^DoDoes ^YOU\_YRCU have or pay for? INCLUDE those that pay for only one type of service (nursing home care, vision care, or dental care). EXCLUDE private plans that only provide extra cash while hospitalized.**   * Read each item on list * Enter all that apply, separate with commas  1. **Private health insurance, including employer and healthcare exchange plans?** 2. **Medicare?** 3. **Medicare Supplemental Insurance (Medi-Gap)?** 4. **Medicaid^MDCDSTfill?** 5. **SCHIP (CHIP/Children’s Health Insurance Program)^ST\_CHIP?** 6. **Military health care (Tricare/VA/CHAMP-VA)?** 7. **Indian Health Service?** 8. **Single service plan (e.g., dental, vision, long-term care)?** 9. No coverage of any type   Fill instructions:   * IF any inventory records, fill “**other**” else leave blank * If all HH members have inventory records of MEDICARE=1 then do not show Medicare (#2) * If 8500.MEDICAID=1 then do not show Medicaid (#4) * If 8500.CHIP=1 then do not show SCHIP (#5) * If 8500.IHS=1 then do not show IHS (#7)   Skip instructions:  DK, REF: IF (AGE ge 65 for at least 1 HH member AND there are no inventory records for Medicare) goto MCAREPRB  ELSEIF there are no inventory records of any kind goto MCAIDPRB  ELSE goto end of screener block  1-8: IF (3 selected without 2 AND there are no inventory records for Medicare) goto ERROR CHECK  ELSEIF (AGE ge 65 for at least 1 HH member AND HIKIND ne 2 AND there are no inventory records for Medicare) goto MCAREPRB  ELSEIF (8 not selected AND there are no inventory records for single service plans) goto SINCOV  ELSE goto end of screener block  9: if HIKIND=1-8 goto ERR\_HIKIND  ELSEIF (AGE ge 65 for at least 1 HH member AND HIKIND ne 2 AND there are no inventory records for Medicare) goto MCAREPRB  ELSEIF there are no inventory records of any kind goto MCAIDPRB  ELSE goto end of screener block |
| MCAREPRB | New screener question for Medicare asked if all of the following are true:   1. there is at least 1 HH member aged 65 or older 2. there are no inventory records for Medicare for any HH members 3. #2 (Medicare) was not selected on HIKIND *or* FHICOV=2 | **[fill:Are you/Is anyone in this household] covered by Medicare?**   1. Yes 2. No   Skip instructions:  IF (HIKIND=9, DK, or REF) AND there are no inventory records of any type goto MCAIDPRB  ELSEIF HIKIND ne 8 AND there are no inventory records for single service plans, goto SINCOV  ELSE goto end of screener block |
| MCAIDPRB | New screener probe question asked if there are no inventory records for Medicaid and one of the following is true:   1. FHICOV=2 2. HIKIND=9 3. HIKIND=DK or REF | **There is a program called Medicaid that pays for health care for persons in need. In this state it is also called ^MDCDSTfill.** **[fill:Are you/Is anyone in this household] covered by Medicaid?**   1. Yes 2. No   Skip instructions:  IF there are no inventory records for single service plans goto SINCOV  ELSE goto end of screener block |
| SINCOV | New screener probe question if there are no inventory single service records and | **[fill: Do you/Does anyone in your household] have or pay fora separate insurance plan that pays for only one type of service such as dental, vision, or long-term care?**   1. Yes 2. No   Skip instructions:  Goto end of screener block |
| End of screener block |  | IF 2 selected in HIKIND OR MCAREPRB=1 goto Medicare block  ELSEIF 4, 5, OR 7 selected in HIKIND OR MCAIDPRB=1 goto Medicaid/CHIP/IHS block  ELSEIF 8 selected in HIKIND OR SINCOV=1 then goto single service block  ELSEIF 1 OR 3 selected in HIKIND goto private insurance block  ELSEIF 6 selected in HIKIND goto military health care block  ELSE goto end of section |

**New Health Insurance Section Detailed Part(s) - Medicare**

| **CEQ CAPI Variable** | **Detail/Description (Detailed Part)** | **201704 Wording/Specification (Detailed Part)** |
| --- | --- | --- |
| MEDICARE | New question to pick up each person in the household covered by Medicare. First questions in a member-level grid similar to that for school meals. | **Who ^else is enrolled in Medicare?**   * Enter line numbers for all that apply, separate with commas  1. Person 1 2. Person 2 3. Person 3   ….   1. Person 30   Fill instructions:  If there exists a Medicare inventory record for at least one HH member fill “**else**” else leave blank  Do not list HH members for which there already exists a Medicare inventory record  Skip instructions:  goto MCCHOICE for first person selected |
| MCCHOICE | New question on whether the person covered by Medicare has a Medicare Advantage plan (also known as Part C – see [here](https://en.wikipedia.org/wiki/Medicare_(United_States)#Part_C:_Medicare_Advantage_plans) on Wikipedia) | **Medicare Advantage is the new name for Medicare Plus Choice plans. [fill: Are you/Is [fill: NAME]] enrolled in a Medicare Advantage plan?**   1. Yes 2. No   Skip instructions:  1: goto MCPREM  2, DK, REF: goto MCHMOPLN |
| MCHMOPLN | New question on whether the person covered by Medicare has a Medicare HMO plan (also Part C like “Medicare Advantage” – see [here](https://www.medicare.gov/sign-up-change-plans/medicare-health-plans/medicare-advantage-plans/types-of-medicare-advantage-plans.html) on Medicare website) | **[fill: Are you/Is [fill: NAME]] under a Medicare managed care arrangement, such as an HMO, that is, a Health Maintenance Organization? (With an HMO, you must generally receive care from HMO doctors, otherwise the expense is not covered unless you were referred by the HMO or there was a medical emergency.)**   1. Yes 2. No   Skip instructions:  1: goto MCPREM  2, DK, REF: goto MCPARTD |
| MCPREM | New question on whether they pay an additional premium for their Medicare Advantage/HMO (Part C) coverage. They may/may not depending on the plan. | **Besides [fill: your/NAME’s] Medicare Part B payment, [fill: are you/is NAME] paying a premium for [fill: your/his/her] [fill: Medicare Advantage/Medicare HMO] plan?**   1. Yes 2. No   Skip instructions:  1: goto MCPRPTCX  2, DK, RF: goto MCPARTD |
| MCPRPTCX | New question to pick up monthly premium if MCPREM=1 | **What is [fill: your/NAME’s] monthly premium for [fill: your/his/her][fill: Medicare Advantage or Medicare HMO] plan?**  Skip instructions:  goto MCPARTD |
| MCPARTD | New question on whether person with Medicare has Part D | **[fill: Are you/Is NAME] enrolled in Medicare Part D, also known as the Medicare Prescription Drug Plan?**   1. Yes 2. No   Skip instructions:  1: goto MCPRPTDX  2, DK, RF: goto MCCHOICE for the next person with Medicare  ELSE goto end of Medicare block |
| MCPRPTDX | New question to pick up monthly Part D premium | **What is [fill: your/NAME’s] monthly premium for [fill: your/his/her] Medicare Part D prescription drug plan?**  Skip instructions:  goto MCCHOICEfor the next person with Medicare  ELSE goto end of Medicare block |
| End of Medicare block |  | Skip instructions:  ELSEIF 4, 5, OR 7 selected in HIKIND OR MCAIDPRB=1 goto Medicaid/CHIP/IHS block  ELSEIF 8 selected in HIKIND OR SINCOV=1 then goto single service block  ELSEIF 1 OR 3 selected in HIKIND goto private insurance block  ELSEIF 6 selected in HIKIND goto military health care block  ELSE goto end of section |

**New Health Insurance Section Detailed Part(s) – Medicaid, CHIP, IHS**

| **CEQ CAPI Variable** | **Detail/Description (Detailed Part)** | **201704 Wording/Specification (Detailed Part)** |
| --- | --- | --- |
| Beginning of Medicaid/CHIP/IHS block |  | IF 4 selected in HIKIND or MCAIDPRB=1 goto MEDICAID  ELSEIF 5 selected in HIKIND goto CHIP  ELSEIF 7 selected in HIKIND goto IHS |
| MEDICAID | New household level question on whether HH is covered by Medicaid  (uses current MDCDSTfill) | **Earlier I recorded that ^YOU\_YRCU is covered by Medicaid^MDCDSTfill. Is that correct?**   1. Yes 2. No   Skip instructions:  1: goto MDCDCOV  2, DK, REF: IF 5 selected in HIKIND goto CHIP  ELSEIF 7 selected in HIKIND goto IHS  ELSE goto end of Medicare/CHIP/IHS block |
| MDCDCOV | Follow-up question to pick up number of household members covered by Medicaid. (Can skip and set automatically if MEDICAID=1 and CU size =1) | **How many members of your household are covered by Medicaid^MDCDSTfill?**  Skip instructions:  goto MXCHNG |
| MXCHNG | New question asking whether Medicaid coverage was picked up through an exchange (question from NHIS) | **Was [fill: your/your household’s] Medicaid obtained through Healthcare.gov or the [fill: Health Insurance Marketplace/Health Insurance Marketplace, such as [fill: state name]?**   1. Yes 2. No   Skip instructions:  goto MEDPREM |
| MEDPREM | Question on whether there is a monthly charge for HH’s Medicaid coverage (some states charge a small fee/premium) | **A health insurance premium is the amount you or a family member pays each month for healthcare coverage. Do [fill: you/you or anyone in your household] pay a premium for your Medicaid^MDCDSTfill plan?**   1. Yes 2. No   Skip instructions:  1: goto MDCDPRMX  2, DK, REF: IF 5 selected in HIKIND goto CHIP  ELSEIF 7 selected in HIKIND goto IHS  ELSE goto end of Medicare/CHIP/IHS block |
| MDCDPRMX | Question to pick up monthly premium amount. | **What is the monthly premium for this Medicaid^MDCDSTfill plan?**  Skip instructions:  IF 5 selected in HIKIND goto CHIP  ELSEIF 7 selected in HIKIND goto IHS  ELSE goto end of Medicare/CHIP/IHS block |
| CHIP | New HH-level question on whether HH is covered by CHIP | **Earlier I recorded that [fill: you/your household] [fill: are/is] covered by the Children’s Health Insurance Program (CHIP)^ST\_CHIP. Is that correct?**   1. Yes 2. No   Skip instructions:  1: goto CHIPCOV  2, DK, REF: IF 7 selected in HIKIND goto IHS  ELSE goto end of Medicare/CHIP/IHS block |
| CHIPCOV | Question to pick up number of HH members covered by CHIP | **How many members of your household are covered by CHIP^ST\_CHIP?**  Skip instructions:  goto CHXCHNG |
| CHXCHNG | Same question as MXCHNG except it’s for CHIP. | **Was [fill: your/your household’s] CHIP plan obtained through Healthcare.gov or the [fill: Health Insurance Marketplace/Health Insurance Marketplace, such as [fill: state name]?**   1. Yes 2. No   Skip instructions:  goto STRFPRM1 |
| STRFPRM1 | Same question as MXCHNG except it’s for CHIP. | **A health insurance premium is the amount you or a family member pays each month for healthcare coverage. Do [fill: you/you or anyone in your household] pay a premium for CHIP^ST\_CHIP?**   1. Yes 2. No   Skip instructions:  1: goto CHIPPRMX  2, DK, REF: IF 7 selected in HIKIND goto IHS  ELSE goto end of Medicaid/CHIP/IHS block |
| CHIPPRMX | Same question as MXCHNG except it’s for CHIP. | **What is the monthly premium for CHIP^ST\_CHIP?**  Skip instructions:  IF 7 selected in HIKIND goto IHS  ELSE goto end of Medicaid/CHIP/IHS block |
| IHS | Question on whether HH is covered by IHS | **Earlier I recorded that [fill: you/your household] [fill: are/is] covered by the Indian Health Service (IHS). Is that correct?**   1. Yes 2. No   Skip instructions:  1: goto IHSCOV  2, DK, REF: goto end of Medicaid/CHIP/IHS block |
| IHSCOV | Question on how many HH members covered by IHS (This can be skipped and set automatically if CU size =1 | **How many members of your household are covered by IHS?**  Skip instructions:  Goto end of Medicaid/CHIP/IHS block |
| End of Medicaid/CHIP/IHS block |  | IF 8 selected in HIKIND OR SINCOV=1 then goto single service block  ELSEIF 1 OR 3 selected in HIKIND goto private insurance block  ELSEIF 6 selected in HIKIND goto military health care block  ELSE goto end of section |

**New Health Insurance Section Detailed Part(s) – Single service plans**

| **CEQ CAPI Variable** | **Detail/Description (Detailed Part)** | **201704 Wording/Specification (Detailed Part)** |
| --- | --- | --- |
| SSTYPE | New first question in row for picking up single service policies.  Note that first fill will only appear the first time the question/screen appears.  Also, in the second sentence, “first” will be filled on the first showing/first row, and then “next” will be filled on subsequent showings/rows. | **[fill: You mentioned that [you have/your household has] a single-service plan – that is, an insurance plan that provides one specific type of coverage.] Let’s talk about your [fill: first/next] single-service plan.**   1. Single-service plan 2. None/No More Entries 3. Delete the line   Fill instructions:  On first instance fill “**You mentioned that [you have/your household has] a single-service plan – that is, an insurance plan that provides one specific type of coverage.**” else leave blank.  Skip instructions:  1: goto SSTYPE2  99: goto end of single service plan block  888: IF no more grid lines then goto end of single service plan block ELSE goto SSTYPE – next line of grid |
| SSTYPE2 | New question to pick up type of single service plan. Long-term care moved to this section since this section will now come up first (and because it’s often thought of as a medical related plan) | **What type of service or care does your single service plan pay for?**   1. Dental care 2. Long-term care 3. Prescriptions 4. Vision care 5. Other (specify)   Skip instructions:  1-4, DK, REF: goto FHICCI6  5: goto SSOTHER |
| SSOTHER | New specify field if ‘other’ selected in SSTYPE2 | * Other type of single-service plan   Skip instructions:  goto HINSCMP |
| SSNSCMP (same as  HINSCMP) | * Same as HINSCMP * Perhaps output to HINSCMP * Use to code HHIBCBS in post processing according to list used in current HHIBCBS help screen | **What is the name of the insurance company for this plan?**  Enter name of insurance company, not the insurance agent  Skip instructions:  goto SSCOVQ |
| SSCOVQ (same as HHICOVQ) | * Same as HHICOVQ * Perhaps output to HHICOVQ | **How many household members are/were covered by this policy?**  Skip instructions:  goto SSGROUP |
| SSGROUP (same as HHIGROUP) | * Same as HHIGROUP * Perhaps output to HHIGROUP | **Was the policy obtained on an individual or group basis?**   1. Individually obtained 2. Group through place of employment 3. Group through other organization   Skip instructions:  goto SSPRYOU |
| SSPRYOU (same as  HHIPRYOU) | * Same as HHIPRYOU * Perhaps output to HHIPRYOU | **^DoDoes\_C ^You\_YRCU pay ANY portion of the premiums for this policy?**   1. Yes 2. No   Skip instructions:  1, DK, REF: goto SSPRDED  2: goto SSPROUT |
| SSPROUT (same as  HHIPROUT) | * Same as HHIPROUT * Perhaps output to HHIPROUT | **Who pays the policy premiums?**   1. An employer or union? 2. Another group or persons outside your household?   Skip instructions:  goto SSMORE |
| SSPRDED (same as HHIPRDED) | * Same as HHIPRDED * Perhaps output to HHIPRDED | **Are any premiums paid through payroll deductions?**   1. Yes 2. No   Skip instructions:  goto SSRPMPD |
| SSRPMPD (same as HHIRPMPD) | * Same as HHIRPMPD except reworded to part A pattern * Perhaps output to HHIRPMPD | **How often are payments made for ^HINSCMPfill ^INCLDEDC?**   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 10. Other   Skip instructions:  1-9: goto SSRPMXB  10, DK, REF: goto SSRGXB |
| SSRPMXB (same as HHIRPMXB) | * Same as HHIRPMXB except reworded to part A pattern * Perhaps output to HHIRPMXB | **What is the amount currently paid ^PERIODICITY?**  Skip instructions:  Goto end of SSMORE |
| SSRGXB (same as HHIIRGXB) | * Same as HHIIRGXB * Perhaps output to HHIIRGXB | **What was the total expense paid for this policy since ^REF\_MONTH not including this month?**  Skip instructions:  goto SSMORE |
| SSMORE | New “any more” question for end of row/picking up policy | **^DoDoes\_C ^YOU\_YRCU have any other single-service plans – that is, any other insurance plans that provide one specific type of coverage?**   1. Yes 2. No   Skip instructions:  1: goto SSTYPE2 for next plan  2, DK, REF: goto end of single service block |
| End of single service block |  | IF 1 OR 3 selected in HIKIND goto private insurance block  ELSEIF 6 selected in HIKIND goto military health care block  ELSE go to end of section |

**New Health Insurance Section Detailed Part(s) – Single service plans**

| **CEQ CAPI Variable** | **Detail/Description (Detailed Part)** | **201704 Wording/Specification (Detailed Part)** |
| --- | --- | --- |
| FHICCI6 | New first question in row for picking up single service policies.  Note that first paragraph fill will only appear the first time the question/screen appears.  Also, in the second paragraph, “first” will be filled on the first showing/first row, and then “next” will be filled on subsequent showings/rows. | **[fill: The next questions are about private health insurance plans [fill: /including Medicare Supplemental Insurance]. These plans can be obtained through work, purchased directly, or through a state or local government program or community program.]**  **Let’s talk about your [fill: first/next] private health insurance plan.**   1. Private health insurance plan 2. None/No More Entries 3. Delete the line   Fill instructions:  First instance fill “**The next questions are about private health insurance [fill: /including Medicare Supplemental Insurance].**” else leave blank  Skip instructions:  1: goto HINSCMP  99: goto BLOCK END  888: IF no more grid lines then goto BLOCK END ELSE goto SSTYPE – next line of grid |
| HINSCMP | * Same as current variable in 14B except skip instructions updated * Use to code HHIBCBS in post processing according to list used in current HHIBCBS help screen | **What is the name of the insurance company for this plan?**  Enter name of insurance company, not the insurance agent  Skip instructions:  if HHIKIND=3 goto MEDIGAP ELSE goto HHICOVQ |
| MEDIGAP | New question only asked if 3 (Medicare Supplemental Insurance) is selected in HIKIND | **Is this a Medicare Supplemental Insurance plan?**   * Medicare Supplemental Insurance is also known as “Medi-Gap” insurance  1. Yes 2. No   Skip instructions:  goto HHICOVQ |
| HHICOVQ | Same as current | **How many household members are/were covered by this policy?**  Skip instructions:  goto PLNMGD  (Note: check to see if a check can be added vs the number of people enrolled in Medicare if this is a Medi-Gap plan) |
| PLNMGD | New question (kind of replaces HIICODE) | **If this policy an HMO (Health Maintenance Organization), an IPA (Individual Practice Association), a PPO (Preferred Provider Organization), or fee-for-service?**   1. HMO/IPA 2. PPO/Fee-for-service   Skip instructions:  1: goto HHIGROUP  2, DK, REF: goto HSAHRA |
| HSAHRA | New question on whether there is an HSA associated with the policy | **With this plan, is there a special account or fund that can be used to pay for medical expenses? The accounts are sometimes referred to as Health Savings Accounts (HSAs), Health Reimbursement Accounts (HRAs), Personal Care accounts, Personal Medical funds, or Choice funds, and are different from Flexible Spending Accounts.**   1. Yes 2. No   Skip instructions:  goto FSA |
| FSA | New question on whether the HH has an FSA | **Do ^YOU\_ANYMEM have a Flexible Spending Account for health expenses? These accounts are offered by some employers to allow employees to set aside pre-tax dollars of their own money for their use throughout the year to reimburse themselves for their out-of-pocket expenses for health care. With this type of account, any money remaining in the account at the end of the year, following a short grace period, is lost to the employee.**   1. Yes 2. No   Skip instructions:  goto HHIGROUP |
| HHIGROUP | Same as current | **Was the policy obtained on an individual or group basis?**   1. Individually obtained 2. Group through place of employment 3. Group through other organization   Skip instructions:  1, 3, DK, REF: goto PORTAL  2: goto HHIPRYOU |
| PORTAL | Same as current | **Was the policy obtained through ^ST\_PORTAL Healthcare.gov?**   1. Yes 2. No   Skip instructions:  1: goto PORTPLAN  2, DK, REF: goto HHIPRYOU |
| PORTPLAN | Same as current | **Is this policy a platinum, gold, silver, bronze, or catastrophic plan?**   1. Platinum plan 2. Gold plan 3. Sliver plan 4. Bronze plan 5. Catastrophic plan   Skip instructions:  goto HHIPRYOU |
| HHIPRYOU | Same as current | **^DoDoes\_C ^You\_YRCU pay ANY portion of the premiums for this policy?**   1. Yes 2. No   Skip instructions:  1, DK, REF: goto HHIPRDED  2: goto HHIPROUT |
| HHIPROUT | Same as current | **Who pays the policy premiums?**   1. An employer or union? 2. Another group or persons outside your household?   Skip instructions:  If PORTAL=1 goto PREMSUBS ELSE goto MORE |
| HHIPRDED | Same as current | **Are any premiums paid through payroll deductions?**   1. Yes 2. No   Skip instructions:  goto HHIRPMXB |
| HHIRPMPD | Same as current except reworded to part A pattern | **How often are payments made for ^HINSCMPfill ^INCLDEDC?**   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 10. Other   Skip instructions:  1-9: goto HHIRPMXB  10, DK, REF: goto HHIIRGXB |
| HHIRPMXB | Same as current except reworded to part A pattern and new HSA fill | **What is the amount currently paid ^PERIODICITY? [fill: Do not include deposits into an HSA or other accounts used to pay for medical expenses.]**  HSA fill instructions:  if HSAHRA=1 fill “**Do not include…**” else leave blank.  Skip instructions:  IF PORTAL=1 goto PREMSUBS ELSE Goto HHIMORE |
| HHIIRGXB | Same as current | **What was the total expense paid for this policy since ^REF\_MONTH not including this month?**  Skip instructions:  if PORTAL=1 goto PREMSUBS ELSE goto HHIMORE |
| PREMSUBS | Same as current | **Is the cost of the premium subsidized based on ^YR\_YRCUS income?**   * 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.  1. Yes 2. No   Skip instructions:  1: goto HHISUBPD  2, DK, REF: goto HHIMORE |
| HHISUBPD | Same as current | **Is the subsidy paid directly to the health insurance company?**   1. Yes 2. No   Skip instructions:  goto MORE |
| HHIMORE | Same as current | **^DoDoes\_C ^YOU\_YRCU have any other private health insurance plans?**   1. Yes 2. No   Skip instructions:  1: goto FHICCI6 for next plan  2, DK, REF: goto end of private insurance block |
| End of private insurance block |  | IF 6 selected in HIKIND goto military health care block  ELSE goto end of section |

**New Health Insurance Section Detailed Part(s) – Military health care block**

| **CEQ CAPI Variable** | **Detail/Description (Detailed Part)** | **201704 Wording/Specification (Detailed Part)** |
| --- | --- | --- |
| MILITARY | New household level question on whether HH is covered by military health care | **Earlier I recorded that ^YOU\_YRCU are covered by military health care. Is that correct?**   1. Yes 2. No   Skip instructions:  1: goto MILSPC  2, DK, REF: goto goto end of military detail block |
| MILSPC | New question on what types of military health care apply to the household.  If there are inventory records for military health care, fill the word “other”  If there are inventory records for a type of military health care, do not show the type in the list. | **What ^other types of military health care [fill: are you/is your household] covered by?**   * Enter all that apply, separate with commas  1. Tricare 2. VA 3. CHAMP-VA 4. Other military coverage (specify)   Fill instructions:  If there are inventory records for military health care, fill “**other**” else leave blank  If 8500.TRICARE=1 then do not show Tricare (#1)  If 8500.VACHAMP=1 then do not show VA (#2) or CHAMP-VA (#3)  If 8500.MILOTHR=1 then do not show other military coverage (specify) (#4)  Store instructions:  If 1 selected, store 1 in TRICARE  If 2 or 3 selected, store 1 in VACHAMP  If 4 selected, store 1 in MILOTHR  Skip instructions:  1-4: IF 4 selected goto MILSPCOT  ELSEIF 2 or 3 selected goto MILVACOV  ELSE goto MILMAN  DK, REF: goto end of military detail block |
| MILSPCOT | Specify field if ‘other’ selected as type | Other military coverage – specify:  Skip instructions:  goto MILOTCOV |
| MILOTCOV | Question to pick up number of HH members covered by the ‘other – specify’ type. (Note that this can be skipped and set automatically if CU size =1) | **How many members of your household are covered by [fill: MILSPCOT]?**  Skip instructions:  IF MILSPC= 2 or 3 goto MILVACOV  ELSEIF MILSPC=1 goto MILMAN  ELSE goto end of military detail block |
| MILVACOV | Question to pick up number of HH members covered by the VA or CHAMPVA type. (Note that this can be skipped and set automatically if CU size =1) | **How many members of your household are covered by [Fill: VA/CHAMP-VA/VA or CHAMP-VA]?**  Skip instructions:  IF MILSPC=1 goto MILMAN  ELSE goto end of military detail block |
| MILMAN | Question to select type of Tricare coverage for the HH. (Main reason for this is that TFL does not have a premium.) | **Is your TRICARE plan – TRICARE Prime, TRICARE Extra, TRICARE Standard, or TRICARE for Life?**   * If more than one plan type, select ‘other (specify)’  1. TRICARE Prime 2. TRICARE Extra 3. TRICARE Standard 4. TRICARE for Life 5. TRICARE other (specify)   Skip instructions:  1-3, DK, REF: goto TRIRPMXB  4: goto BLOCK END  5: goto MILMANOT |
| MILMANOT | Question to pick up ‘other – specify’ for Tricare | Other type of TRICARE coverage – specify:  Skip instructions:  goto TRIRPMXB |
| TRIRPMPD | Same as current except reworded to part A pattern | **How often are payments made for ^Tricare\_type including payroll deductions?**   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 10. Other   Fill instructions:  For Tricare\_type, fill type of Tricare entered in MILMAN. If MILMAN=5, fill entry in MILMANOT.  Skip instructions:  1-9: goto TRIRPMXB  10, DK, REF: goto TRIIRGXB |
| TRIRPMXB | Same as current except reworded to part A pattern | **What is the amount currently paid ^PERIODICITY?**  Skip instructions:  Goto End of military block/end of section |
| TRIIRGXB | Same as current 14B question except fill for Tricare type added. | **What was the total expense paid for [fill: Tricare type] since ^REF\_MONTH not including this month?**  Fill instructions:  For Tricare\_type, fill type of Tricare entered in MILMAN. If MILMAN=5, fill entry in MILMANOT.  Skip instructions:  goto End of military block/end of section |

**Section 15 changes**

| **CEQ Section** | **CEQ CAPI Variable** | **Change Detail** | **201607 Wording/Specification** | **201704 Wording/Specification** |
| --- | --- | --- | --- | --- |
| (Current) Section 15 | Section 15A, 15B | Move/re-number the ‘Medical and Health Expenditures’ section to Section 14 (including global prechart, products file, and help file) | Section 15 – Medical and Health Expenditures  S15 – Medical | Section 14 – Medical and Health Expenditures  S14 - Medical |

**Section 15A changes**

| **CEQ Section** | **CEQ CAPI Variable** | **Change Detail** | **201607 Wording/Specification** | **201704 Wording/Specification** |
| --- | --- | --- | --- | --- |
| (Current) Section 15A (future 14A) | MEDPDESC | Update skip instructions due to new follow-up question for ‘services by medical professionals other than physicians’ | * Ask if not apparent   **Describe the care/service/item.**  Skip instructions:  IF ITEM = 14 or 15 then goto MEDPPRNT  ELSE goto MEDPGFTC | * Ask if not apparent   **Describe the care/service/item.**  Skip instructions:  **IF ITEM=5 goto MEDPNOUT**  **ELSE**IF ITEM = 14 or 15 then goto MEDPPRNT  ELSE goto MEDPGFTC |
| (Current) Section 15A (future 14A) | MEDPNOUT | New follow-up question for ‘services by medical professionals other than physicians’ | N/A | **Was this service provided inside or outside the home?**   1. Inside the home 2. Outside the home   Skip instructions:  goto MEDPGFTC |

**Section 15B changes**

| **CEQ Section** | **CEQ CAPI Variable** | **Change Detail** | **201607 Wording/Specification** | **201704 Wording/Specification** |
| --- | --- | --- | --- | --- |
| (Current) Section 15B (future 14B) | S15B\_INTRO | Change last sentence/paragraph to a fill based on whether household reports having an FSA or HSA in the health insurance section | **Now I am going to ask some questions about your reimbursements.**  **By reimbursements I mean any money received for any members of your household from an insurance company, medical care provider or non-household member for medical expenses which you previously paid or will pay.**  **Do not include reimbursements from any consumer-driven health plans such as Flexible Spending Accounts (FSA), Health Reimbursement Accounts (HRA), Health Savings Accounts (HSA), High Deductible Health Plans (HDHP), or Medical Savings Accounts (MSA).**   1. Enter 1 to continue   Skip instructions:  Goto ITEM | **Now I am going to ask some questions about your reimbursements.**  **By reimbursements I mean any money received for any members of your household from an insurance company, medical care provider or non-household member for medical expenses which you previously paid or will pay.**  **^HSAHRAFSA**   1. Enter 1 to continue   Fill instructions:  If there exists a policy record with HSAHRA=1 or FSA=1 or an inventory policy record with 8500.HSAHRA=1 or 8500.FSA=1, fill “**Do not include reimbursements from any consumer-driven health plans such as Flexible Spending Accounts (FSA), Health Reimbursement Accounts (HRA), Health Savings Accounts (HSA), High Deductible Health Plans (HDHP), or Medical Savings Accounts (MSA).**”  ELSE leave blank.  Skip instructions:  Goto ITEM |
| (Current) Section 15B (future 14B) | MEDRDESC | Update skip instructions due to new follow-up question for ‘services by medical professionals other than physicians’ | * Ask if not apparent   **Describe the care/service/item.**  Skip instructions:  IF ITEM = 14 or 15 then goto MEDRPRNT  ELSE goto MEDRGFTC | * Ask if not apparent   **Describe the care/service/item.**  Skip instructions:  **IF ITEM=5 goto MEDRNOUT**  **ELSE**IF ITEM = 14 or 15 then goto MEDRPRNT  ELSE goto MEDRGFTC |
| (Current) Section 15A (future 14A) | MEDRNOUT | New follow-up question for ‘services by medical professionals other than physicians’ | N/A | **Was this service provided inside or outside the home?**   1. Inside the home 2. Outside the home   Skip instructions:  goto MEDRGFTC |

**Section 17 changes**

| **CEQ Section** | **CEQ CAPI Variable** | **Change Detail** | **201607 Wording/Specification** | **201704 Wording/Specification** |
| --- | --- | --- | --- | --- |
| 17 | SUB\_ITEM | * Split “tickets to movies, parks, or museums” into two item codes * Reverser order of “photographic film or disposable cameras” and “photo printing or processing” * Add/move satellite radio services from 4C * Replace “Rhapsody” with “Spotify” in the subscription music services * Delete item code for book clubs and reword remaining book item code * Combine “rented videos/DVDs” and “streaming video subscriptions” into a single item code | **SCREEN 1 - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -**  **Since the first of ^REF\_MONTH have ^YOU\_ANYMEM 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.**   * Read each item on list.  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   **SCREEN 2 - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -**  **Since the first of ^REF\_MONTH, have ^YOU\_ANYMEM purchased any of the following items for your household or for someone outside your household?**   * Read each item on list  1. Single or season tickets to spectator sports events such as football, baseball, hockey racing, or track events 2. Single or season tickets to plays, operas, or concerts 3. **Tickets to movies, parks, or museums** 4. Single copies of newspapers, magazines, or periodicals, including digital 5. Subscriptions to newspapers, magazines, or periodicals, including digital 6. **Books purchased through a book club** 7. **Books or digital books not purchased through a book club. Do not include school books or reference books.**   **SCREEN 3 - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -**  **Have you purchased any –**   * Read each item on list   Report blank tapes, CDs, and DVDs in Section 6B under item code 11   1. **Photographic film or disposable cameras** 2. **Photo printing or processing** 3. Purchased music files, CDs, or records 4. Subscription music services such as Rhapsody or Pandora 5. Purchased video files, Blu-Ray discs, or DVDs 6. **Rented video files or DVDs** 7. **Streaming video subscriptions** 8. Purchased video games, not including computer games 9. Rented video games 10. Applications, games, or ringtones for a cellphone or mobile device not already reported 11. Online games or other internet entertainment sites   Store instructions:  Assign a code to S17CODEA:  IF ITEM = 1, store 800 in S17CODEA  IF ITEM = 2, store 830 in S17CODEA  IF ITEM = 3, store 610 in S17CODEA  IF ITEM = 4, store 950 in S17CODEA  IF ITEM = 5, store 810 in S17CODEA  IF ITEM = 6, store 820 in S17CODEA  IF ITEM = 7, store 840 in S17CODEA  IF ITEM = 8, store 930 in S17CODEA  IF ITEM = 9, store 600 in S17CODEA  IF ITEM = 10, store 500 in S17CODEA  **IF ITEM = 11, store 510 in S17CODEA**  IF ITEM = **12**, store 160 in S17CODEA  IF ITEM = **13**, store 150 in S17CODEA  **IF ITEM = 14, store 200 in S17CODEA**  **IF ITEM = 15, store 210 in S17CODEA**  **IF ITEM = 16, store 300 in S17CODEA**  **IF ITEM = 17, store 310 in S17CODEA**  IF ITEM = **18**, store 320 in S17CODEA  IF ITEM = **19**, store 330 in S17CODEA  IF ITEM = **20**, store 340 in S17CODEA  **IF ITEM = 21, store 350 in S17CODEA**  **IF ITEM = 22, store 360 in S17CODEA**  IF ITEM = **23**, store 370 in S17CODEA  IF ITEM = **24**, store 380 in S17CODEA  IF ITEM = **25**, store 400 in S17CODEA  IF ITEM = **26**, store 410 in S17CODEA  Special instructions:   1. Prefill the PREFIL and DESCRIPTION field with the following descriptions. Gray out the PREFIL field.   IF ITEM = 1, pre-fill "Golf courses/country clubs"  IF ITEM = 2, pre-fill "Health/fitness/recreation clubs"  IF ITEM = 3, pre-fill "Fees for sports participation"  IF ITEM = 4, pre-fill "Vacation clubs"  IF ITEM = 5, pre-fill "Civic/service/fraternal/social org"  IF ITEM = 6, pre-fill "Credit Card membership fees"  IF ITEM = 7, pre-fill "Shopping club/discount memberships"  IF ITEM = 8, pre-fill "Dating services"  IF ITEM = 9, pre-fill "Tickets to sports events"  IF ITEM = 10, pre-fill "Tickets to live entertainment"  **IF ITEM = 11, pre-fill "Tickets to movies/parks/museums"**  IF ITEM = **12**, pre-fill "Single copies newspapers/magazines"  IF ITEM = **13**, pre-fill "Subscriptions newspapers/magazines"  **IF ITEM = 14, pre-fill "Books from book club"**  **IF ITEM = 15, pre-fill "Books/digital books"**  **IF ITEM = 16, pre-fill "Film/disposable cameras"**  **IF ITEM = 17, pre-fill "Photo printing/processing"**  IF ITEM = **18**, pre-fill "Purchased music"  IF ITEM = **19**, pre-fill "Subscriptions music service"  IF ITEM = **20**, pre-fill "Purchased video files/discs"  **IF ITEM = 21, pre-fill "Rented video files/discs"**  **IF ITEM = 22, pre-fill "Streaming video subscriptions"**  IF ITEM = **23**, pre-fill "Purchased video games"  IF ITEM = **24**, pre-fill "Rented video games"  IF ITEM = **25**, pre-fill "Apps/games/ringtones mobile device"  IF ITEM = **26**, pre-fill "Online games/internet entertainment"   1. For Screen 1, display Answer list options 1-8, 95, 888   For Screen 2, display Answer list options 9-15, 95, 888  For Screen 3, display Answer list options 16-26, 99, 888  Skip instructions:  1-26: IF ITEM ne Item2Shadow then goto CK\_ITEM  ELSE goto DESCRIPTION  95: Goto next row  99: Goto S17A\_END  888: IF no more grid lines goto S17A\_END  ELSE goto ITEM - next line of grid | **SCREEN 1 - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -**  **Since the first of ^REF\_MONTH have ^YOU\_ANYMEM 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.**   * Read each item on list.  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   **SCREEN 2 - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -**  **Since the first of ^REF\_MONTH, have ^YOU\_ANYMEM purchased any of the following items for your household or for someone outside your household?**   * Read each item on list  1. Single or season tickets to spectator sports events such as football, baseball, hockey racing, or track events 2. Single or season tickets to plays, operas, or concerts 3. **Movie tickets** 4. **Tickets to parks or museums** 5. Single copies of newspapers, magazines, or periodicals, including digital 6. Subscriptions to newspapers, magazines, or periodicals, including digital 7. **Books, digital books, or book subscriptions. Do not include school books or reference books.**   **SCREEN 3 - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -**  **Have you purchased any –**   * Read each item on list   Report blank tapes, CDs, and DVDs in Section 6B under item code 11   1. **Photo printing or processing** 2. **Photographic film or disposable cameras** 3. Purchased music files, CDs, or records 4. **Sirius/XM satellite radio service** 5. Subscription music services such as **Spotify** or Pandora 6. Purchased video files, Blu-Ray discs, or DVDs 7. **Rented video files or DVDs or streaming video subscriptions** 8. Purchased video games, not including computer games 9. Rented video games 10. Applications, games, or ringtones for a cellphone or mobile device not already reported 11. Online games or other internet entertainment sites   Store instructions:  Assign a code to S17CODEA:  IF ITEM = 1, store 800 in S17CODEA  IF ITEM = 2, store 830 in S17CODEA  IF ITEM = 3, store 610 in S17CODEA  IF ITEM = 4, store 950 in S17CODEA  IF ITEM = 5, store 810 in S17CODEA  IF ITEM = 6, store 820 in S17CODEA  IF ITEM = 7, store 840 in S17CODEA  IF ITEM = 8, store 930 in S17CODEA  IF ITEM = 9, store 600 in S17CODEA  IF ITEM = 10, store 500 in S17CODEA  **IF ITEM = 11, store 520 in S17CODEA**  **IF ITEM = 12, store 530 in S17CODEA**  IF ITEM = **13**, store 160 in S17CODEA  IF ITEM = **14**, store 150 in S17CODEA  **IF ITEM = 15, store 210 in S17CODEA**  **IF ITEM = 16, store 310 in S17CODEA**  **IF ITEM = 17, store 300 in S17CODEA**  IF ITEM = **18**, store 320 in S17CODEA  **IF ITEM = 19, store 700 in S17CODEA**  IF ITEM = **20**, store 330 in S17CODEA  IF ITEM = **21**, store 340 in S17CODEA  **IF ITEM = 22, store 355 in S17CODEA**  IF ITEM = **23**, store 370 in S17CODEA  IF ITEM = **24**, store 380 in S17CODEA  IF ITEM = **25**, store 400 in S17CODEA  IF ITEM = **26**, store 410 in S17CODEA  Special instructions:   1. Prefill the PREFIL and DESCRIPTION field with the following descriptions. Gray out the PREFIL field.   IF ITEM = 1, pre-fill "Golf courses/country clubs"  IF ITEM = 2, pre-fill "Health/fitness/recreation clubs"  IF ITEM = 3, pre-fill "Fees for sports participation"  IF ITEM = 4, pre-fill "Vacation clubs"  IF ITEM = 5, pre-fill "Civic/service/fraternal/social org"  IF ITEM = 6, pre-fill "Credit Card membership fees"  IF ITEM = 7, pre-fill "Shopping club/discount memberships"  IF ITEM = 8, pre-fill "Dating services"  IF ITEM = 9, pre-fill "Tickets to sports events"  IF ITEM = 10, pre-fill "Tickets to live entertainment"  **IF ITEM = 11, pre-fill "Movie tickets"**  **IF ITEM = 12, pre-fill "Tickets to parks/museums"**  IF ITEM = **13**, pre-fill "Single copies newspapers/magazines"  IF ITEM = **14**, pre-fill "Subscriptions newspapers/magazines"  **IF ITEM = 15, pre-fill "Books/digital books"**  **IF ITEM = 16, pre-fill "Photo printing/processing "**  **IF ITEM = 17, pre-fill "Film/disposable cameras "**  IF ITEM = **18**, pre-fill "Purchased music"  **IF ITEM = 19, pre-fill "Sirius/XM Radio"**  IF ITEM = **20**, pre-fill "Subscriptions music service"  IF ITEM = **21**, pre-fill "Purchased video files/discs"  **IF ITEM = 22, pre-fill "Rented/streaming video"**  IF ITEM = **23**, pre-fill "Purchased video games"  IF ITEM = **24**, pre-fill "Rented video games"  IF ITEM = **25**, pre-fill "Apps/games/ringtones mobile device"  IF ITEM = **26**, pre-fill "Online games/internet entertainment"   1. For Screen 1, display Answer list options 1-8, 95, 888   For Screen 2, display Answer list options 9-15, 95, 888  For Screen 3, display Answer list options 16-28, 99, 888  Skip instructions:  1-28: IF ITEM ne Item2Shadow then goto CK\_ITEM  ELSE goto DESCRIPTION  95: Goto next row  99: Goto S17A\_END  888: IF no more grid lines goto S17A\_END  ELSE goto ITEM - next line of grid |
| 17 | SUBMO | * Update item numbers in S17\_TmpFillinstr and in skip instructions due to splitting ‘tickets to movies, parks, or museums’ into 2 item codes * Further updates to item numbers for month 13 option/skip instructions | **In what month did you have this expense?**  ^S17\_TmpFillinstr   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. ^S17\_13Option   S17\_TmpFillinstr fill instructions:  IF SUB\_ITEM = 1-2, 8, **14,** 19, **21-**22, 24, pre-fill " **\*** Enter 13 for same amount each month of the reference period" ELSE leave blank  Skip instructions:  REF\_MONTH – CUR\_MONTH: Goto SUBEXPX  13: IF ITEM = 3-7, 9-**13, 15**-18**, 20,** 23, 25, or 26 then goto CK\_MONTH  ELSE goto SUBEXPX  DK, RF: go to SUBEXPX | **In what month did you have this expense?**  ^S17\_TmpFillinstr   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. ^S17\_13Option   S17\_TmpFillinstr fill instructions:  IF SUB\_ITEM = 1-2, 8, **15,** 19-**20,** 22, 24, pre-fill " **\*** Enter 13 for same amount each month of the reference period" ELSE leave blank  Skip instructions:  REF\_MONTH – CUR\_MONTH: Goto SUBEXPX  13: IF ITEM = 3-7, 9-**14, 16**-18, **21,** 23, 25, or 26 then goto CK\_MONTH  ELSE goto SUBEXPX  DK, RF: go to SUBEXPX |
| 17 | SUBEXPX | * Update item numbers in SHIPHANDL and Ticketservfee and in skip instructions due to splitting ‘tickets to movies, parks, or museums’ into 2 item codes * Remove outlet test changes * Further updates to item numbers for SHIPHANDL, Ticketservfee * Further updates to skip instructions based on updated item numbers | **^SUBEXPX\_fill ^SHIPHANDL**  ^Ticketservfee  SUBEXPX fill instructions:  IF MONTH = 1-12, DK, or RF, fill "**What was the total amount of this expense?**" ELSE fill "**What is ^YR\_YRCUS monthly expense?**"  SHIPHANDL fill instructions:  IF ITEM = 9-10, **12-15, 17-**18, **20,** 23, fill "**(Include shipping and handling fees.)**"  Ticketservfee fill instructions:  IF ITEM = 9-**11**, fill " **\*** Include ticket/admission service fees and surcharges."  Skip instructions:  If (ITEM = 1 or 2 and AMOUNT lt 5 or gt 1060) OR  (ITEM = 3 and AMOUNT lt 6 or gt 750) OR  (ITEM = 4 and AMOUNT lt 800 or gt 10,000) OR  (ITEM = 5 and AMOUNT lt 5 or gt 300) OR  (ITEM = 6 and AMOUNT lt 5 or gt 300) OR  (ITEM = 7 and AMOUNT lt 5 or gt 300) OR  (ITEM = 8 and AMOUNT lt 5 or gt 1200) OR  (ITEM = 9 and AMOUNT lt 5 or gt 2500) OR  (ITEM = 10 and AMOUNT lt 5 or gt 720) OR  **(ITEM = 11 and AMOUNT lt 5 or gt 320) OR**  (ITEM = **12** and AMOUNT lt 5 or gt 250) OR  (ITEM = **13** and AMOUNT lt 7 or gt 145) OR  **(ITEM = 14 and AMOUNT lt 7 or gt 145) OR**  **(ITEM = 15 and AMOUNT lt 5 or gt 300) OR**  **(ITEM = 16 and AMOUNT lt 5 or gt 100) OR**  **(ITEM = 17 and AMOUNT lt 5 or gt 150) OR**  (ITEM = **18** and AMOUNT lt 1 or gt 250) OR  (ITEM = **19** and AMOUNT lt 1 or gt 100) OR  (ITEM = **20** and AMOUNT lt 1 or gt 209) OR  **(ITEM = 21 and AMOUNT lt 5 or gt 150) OR**  **(ITEM = 22 and AMOUNT lt 1 or gt 100) OR**  (ITEM = **23** and AMOUNT lt 8 or gt 200) OR  (ITEM = **24** and AMOUNT lt 8 or gt 390) OR  (ITEM = **25** and AMOUNT lt 1 or gt 30) OR  (ITEM = **26** and AMOUNT lt 1 or gt 50) then goto ERR1\_AMOUNT  ELSEIF ITEMCODEOUT and the entry in AMOUNT for this record  are equal to any records data on the pre-chart/Input  then goto ERR\_DUP  ELSEIF ITEM = **18, 20, 21, 22, or 25**, goto S17ACM\_S  **ELSEIF INTNMBR=4 AND (INTPER=201607, 201608, or 201609) AND ITEM=11, goto TICSTORE**  ELSE goto S17AOTHR | **^SUBEXPX\_fill ^SHIPHANDL**  ^Ticketservfee  SUBEXPX fill instructions:  IF MONTH = 1-12, DK, or RF, fill "**What was the total amount of this expense?**" ELSE fill "**What is ^YR\_YRCUS monthly expense?**"  SHIPHANDL fill instructions:  IF ITEM = 9-10, **13-16,** 18, **21,** 23, fill "**(Include shipping and handling fees.)**"  Ticketservfee fill instructions:  IF ITEM = 9-**12**, fill " **\*** Include ticket/admission service fees and surcharges."  Skip instructions:  If (ITEM = 1 or 2 and AMOUNT lt 5 or gt 1060) OR  (ITEM = 3 and AMOUNT lt 6 or gt 750) OR  (ITEM = 4 and AMOUNT lt 800 or gt 10,000) OR  (ITEM = 5 and AMOUNT lt 5 or gt 300) OR  (ITEM = 6 and AMOUNT lt 5 or gt 300) OR  (ITEM = 7 and AMOUNT lt 5 or gt 300) OR  (ITEM = 8 and AMOUNT lt 5 or gt 1200) OR  (ITEM = 9 and AMOUNT lt 5 or gt 2500) OR  (ITEM = 10 and AMOUNT lt 5 or gt 720) OR  **(ITEM = 11 and AMOUNT lt 1 or gt 100) OR**  **(ITEM = 12 and AMOUNT lt 5 or gt 320) OR**  (ITEM = **13** and AMOUNT lt 5 or gt 250) OR  (ITEM = **14** and AMOUNT lt 7 or gt 145) OR  **(ITEM = 15 and AMOUNT lt 5 or gt 300) OR**  **(ITEM = 16 and AMOUNT lt 5 or gt 150) OR**  **(ITEM = 17 and AMOUNT lt 5 or gt 100) OR**  **(ITEM = 18 and AMOUNT lt 1 or gt 250) OR**  **(ITEM = 19 and AMOUNT lt 5 or gt 500) OR**  (ITEM = **20** and AMOUNT lt 1 or gt 100) OR  (ITEM = **21** and AMOUNT lt 1 or gt 209) OR  **(ITEM = 22 and AMOUNT lt 1 or gt 150) OR**  (ITEM = **23** and AMOUNT lt 8 or gt 200) OR  (ITEM = **24** and AMOUNT lt 8 or gt 390) OR  (ITEM = **25** and AMOUNT lt 1 or gt 30) OR  (ITEM = **26** and AMOUNT lt 1 or gt 50) then goto ERR1\_AMOUNT  ELSEIF ITEMCODEOUT and the entry in AMOUNT for this record  are equal to any records data on the pre-chart/Input  then goto ERR\_DUP  ELSEIF ITEM = **18, 21, 22, or 25**, goto S17ACM\_S  ELSE goto S17AOTHR |
| 17 | S17ACMB | * Update item numbers due to splitting ‘tickets to movies, parks, or museums’ into 2 item codes * Updated item numbers and combining ‘rented video files/DVDs’ and ‘streaming video subscriptions’ | **What other expense is the ^S17ACMB\_fill combined with?**   1. Purchased music files, CDs, or records 2. Purchased video files, Blu-Ray discs, or DVDs 3. Rented video files or DVDs 4. **Streaming video subscriptions** 5. Applications, games, or ringtones for a cellphone or mobile device not already reported   S17ACMB\_fill instructions:  **I**F ITEM = 18, fill "**music files or discs**"  IF ITEM = **20**, fill "**videos or discs**"  IF ITEM = **21**, fill "**rented videos or discs**"  IF ITEM = **22**, fill "**streaming video subscription**"  IF ITEM = 25, fill "**apps, games, or ringtones**"  Store instructions:  For each item selected in COMBCODE, store the appropriate  item code in S17CODE1- S17CODE5. (The first entry in COMBCODE should be recoded and stored in S17CODE1, the 2nd entry in S17CODE2, etc.)  Recode as follows:  IF 18, store 320 in S17CODE1  IF **20**, store 340 in S17CODE2  IF **21**, store 350 in S17CODE3  IF **22**, store 360 in S17CODE4  IF 25, store 400 in S17CODE5  Skip instructions:  Goto S17AOTHR | **What other expense is the ^S17ACMB\_fill combined with?**   1. Purchased music files, CDs, or records 2. Purchased video files, Blu-Ray discs, or DVDs 3. Rented video files or DVDs **or** **streaming video subscriptions** 4. Applications, games, or ringtones for a cellphone or mobile device not already reported   S17ACMB\_fill instructions:  **I**F ITEM = 18, fill "**music files or discs**"  IF ITEM = **21**, fill "**videos or discs**"  IF ITEM = **22**, fill "**streaming or rented videos**"  IF ITEM = 25, fill "**apps, games, or ringtones**"  Store instructions:  For each item selected in COMBCODE, store the appropriate  item code in S17CODE1- S17CODE5. (The first entry in COMBCODE should be recoded and stored in S17CODE1, the 2nd entry in S17CODE2, etc.)  Recode as follows:  IF 18, store 320 in S17CODE1  IF **21**, store 340 in S17CODE2  IF **22**, store **355** in S17CODE3  IF 25, store 400 in S17CODE5  Skip instructions:  Goto S17AOTHR |
| 17 | TICSTORE | Delete variable | **Where did you purchase these tickets?**   * Enter store, website, or company name. If purchased from a private individual, enter “private individual.”   Store instructions:  If ENTRY ends with “.com”, “.Com”, “.cOm”, “.coM”, “.COm", “.CoM”, “.cOM”, or “.COM”, then set TICPURCH=1  Skip instructions:  30 characters: if ENTRY ends with “.com”, “.Com”, “.cOm”, “.coM”, “.COm", “.CoM”, “.cOM”, or “.COM”, then goto MORE  ELSE goto TICPURCH  DK, REF: goto MORE | Delete variable |
| 17 | TICPURCH | Delete variable | * Ask if not apparent:   **Was this purchased online or in-person?**   1. Online 2. In person   Skip instructions:  1, DK, REF: goto MORE  2: goto TICLOC | Delete variable |
| 17 | TICLOC | Delete variable | **Where is [fill: TICSTORE] located?**   * Enter city and state   TICSTORE fill instructions:  Fill entry from TICSTORE  Skip instructions:  200 characters, DK, REF: goto MORE | Delete variable |
| 17 | S17AOTHR | * Update item numbers and fills for ‘movie tickets’ and ‘tickets to parks or museums’ due to splitting ‘tickets to movies, parks, or museums’ into 2 item codes * Updated further based on updates to item codes | **Did you ^PURCHASE\_PAY any other ^S17AOTHR?**   1. Yes 2. No   PURCHASE\_PAY fill instructions:  IF ITEM = 9-18, **20,** 23, or 25, fill "**purchase**"  IF ITEM = **21,** 24, fill "**pay for renting**"  ELSE fill "**pay for**"  S17AOTHR fill instructions:  IF ITEM = 1, pre-fill "**golf courses or country clubs**"  IF ITEM = 2, pre-fill "**health clubs, fitness centers, swimming pools, weight loss centers, or other sports or recreational organizations**"  IF ITEM = 3, pre-fill "**fees for participating in sports**"  IF ITEM = 4, pre-fill "**vacation clubs**"  IF ITEM = 5, pre-fill "**civic, service, fraternal, or other social organizations**"  IF ITEM = 6, pre-fill "**credit card membership fees**"  IF ITEM = 7, pre-fill "**shopping club membership fees or discount memberships**"  IF ITEM = 8, pre-fill "**direct or online dating services**"  IF ITEM = 9, pre-fill "**single or season tickets to spectator sports events**"  IF ITEM = 10, pre-fill "**single or season tickets to plays, operas or concerts**"  **IF ITEM = 11, pre-fill "tickets to movies, parks, or museums"**  IF ITEM = **12**, pre-fill "**single copies of newspapers, magazines, or periodicals, including digital**"  IF ITEM = **13**, pre-fill "**subscriptions to newspapers, magazines, or periodicals, including digital**"  **IF ITEM = 14, pre-fill "books purchased through a book club"**  **IF ITEM = 15, pre-fill "books or digital books not purchased through a book club"**  **IF ITEM = 16, pre-fill "photographic film or disposable cameras"**  **IF ITEM = 17, pre-fill "photo printing or processing"**  IF ITEM = **18**, pre-fill "**music files or discs**"  IF ITEM = **19**, pre-fill "**subscription music services**"  IF ITEM = **20**, pre-fill "**video files or discs**"  **IF ITEM = 21, pre-fill "video files or discs"**  **IF ITEM = 22, pre-fill "streaming video subscriptions"**  IF ITEM = **23**, pre-fill "**video games**"  IF ITEM = **24**, pre-fill "**video games**"  IF ITEM = **25**, pre-fill "**apps, games, or ringtones for a mobile device**"  IF ITEM = **26**, pre-fill "**online games or other internet entertainment** "  Skip instructions:  1: IF ROW number = 40 then goto ERR\_MAX  ELSE goto ITEM, next line of grid  2,DK,RF: Goto ITEM, next line of grid | **Did you ^PURCHASE\_PAY any other ^S17AOTHR?**   1. Yes 2. No   PURCHASE\_PAY fill instructions:  IF ITEM = 9**-14, 17-**18, **21,** 23, or 25, fill "**purchase**"  IF ITEM = 24, fill "**pay for renting**"  ELSE fill "**pay for**"  S17AOTHR fill instructions:  IF ITEM = 1, pre-fill "**golf courses or country clubs**"  IF ITEM = 2, pre-fill "**health clubs, fitness centers, swimming pools, weight loss centers, or other sports or recreational organizations**"  IF ITEM = 3, pre-fill "**fees for participating in sports**"  IF ITEM = 4, pre-fill "**vacation clubs**"  IF ITEM = 5, pre-fill "**civic, service, fraternal, or other social organizations**"  IF ITEM = 6, pre-fill "**credit card membership fees**"  IF ITEM = 7, pre-fill "**shopping club membership fees or discount memberships**"  IF ITEM = 8, pre-fill "**direct or online dating services**"  IF ITEM = 9, pre-fill "**single or season tickets to spectator sports events**"  IF ITEM = 10, pre-fill "**single or season tickets to plays, operas or concerts**"  **IF ITEM = 11, pre-fill "movie tickets"**  **IF ITEM = 12, pre-fill "tickets to parks or museums"**  IF ITEM = **13**, pre-fill "**single copies of newspapers, magazines, or periodicals, including digital**"  IF ITEM = **14**, pre-fill "**subscriptions to newspapers, magazines, or periodicals, including digital**"  IF ITEM = **15**, pre-fill "**books, digital books, or book subscriptions**"  **IF ITEM = 16, pre-fill "photo printing or processing"**  **IF ITEM = 17, pre-fill "photographic film or disposable cameras"**  IF ITEM = **18**, pre-fill "**music files or discs**"  IF ITEM = **19**, pre-fill “**Siriux/XM radio**”  IF ITEM = **20**, pre-fill "**subscription music services**"  IF ITEM = **21**, pre-fill "**video files or discs**"  **IF ITEM = 22, pre-fill "video streaming or rentals"**  IF ITEM = **23**, pre-fill "**video games**"  IF ITEM = **24**, pre-fill "**video games**"  IF ITEM = **25**, pre-fill "**apps, games, or ringtones for a mobile device**"  IF ITEM = **26**, pre-fill "**online games or other internet entertainment** "  Skip instructions:  1: IF ROW number = 40 then goto ERR\_MAX  ELSE goto ITEM, next line of grid  2,DK,RF: Goto ITEM, next line of grid |

**Section 20A changes**

| **CEQ Section** | **CEQ CAPI Variable** | **Change Detail** | **201607 Wording/Specification** | **201704 Wording/Specification** |
| --- | --- | --- | --- | --- |
| 20A | CIGARETT | Add “Do not include e-cigarettes.” to the question wording | **Since the first of ^REF\_MONTH, have ^YOU\_ANYMEM purchased cigarettes?**   1. Yes 2. No   Skip instrucitons:  1: Goto CIGARETX  2,DK,RF: Goto OTHTOBAC | **Since the first of ^REF\_MONTH, have ^YOU\_ANYMEM purchased cigarettes? Do not include e-cigarettes.**   1. Yes 2. No   Skip instrucitons:  1: Goto CIGARETX  2,DK,RF: Goto OTHTOBAC |
| 20A | OTHTOBAC | Add “vaping products” to the question wording | **Have ^YOU\_ANYMEM purchased other tobacco products such as cigars, pipe tobacco, or chewing tobacco?**   1. Yes 2. No   Skip instructions:  1: Goto OTHTBACX  2,DK,RF: Goto ALC\_HOMX | **Have ^YOU\_ANYMEM purchased other tobacco products such as cigars, pipe tobacco, chewing tobacco, or vaping products?**   1. Yes 2. No   Skip instructions:  1: Goto OTHTBACX  2,DK,RF: Goto ALC\_HOMX |

**Section 20B changes**

| **CEQ Section** | **CEQ CAPI Variable** | **Change Detail** | **201607 Wording/Specification** | **201704 Wording/Specification** |
| --- | --- | --- | --- | --- |
| 20B | TXLIMSRV | Reword “taxis or limousine service” to “taxis, limousine service, or car rides booked through an app” | **Since the first of ^REF\_MONTH not including ^CUR\_MONTH,**  **have ^YOU\_ANYMEM had expenses for taxis or limousine service? Do not include expenses entirely reimbursed for business purposes or expenses incurred on a trip.**   1. Yes 2. No   Skip instructions:  1: goto TXLIMX  2, DK, RF: goto MASSTRAN | **Since the first of ^REF\_MONTH not including ^CUR\_MONTH,**  **have ^YOU\_ANYMEM had expenses for taxis, limousine service, or car rides booked through an app? Do not include expenses entirely reimbursed for business purposes or expenses incurred on a trip.**   1. Yes 2. No   Skip instructions:  1: goto TXLIMX  2, DK, RF: goto MASSTRAN |
| 20B | MASSTRAN | * Revise question wording and FR instruction as shown. * Update skip instructions based on new follow-up question pattern | **Do ^YOU\_ANYMEM use mass transportation services such as a bus, subway, mini-bus or train? Include all commuter services. Do not include expenses covered by employer-provided transit subsidies.**   * Include commuter rail, light rail, and trolleys as mass transit  1. Yes 2. No   Skip instructions:  1: Goto **TRANWRKX**  2,DK,RF: Goto S20B\_END | **Do ^YOU\_ANYMEM pay out-of-pocket for public transportation services such as bus, subway, train, or passenger ferry?**   * Include all forms of public transportation  1. Yes 2. No   Skip instructions:  1: Goto **TRANSIT**  2,DK,RF: Goto S20B\_END |
| 20B | TRANWRKX | Delete question | **What is the usual MONTHLY cost to use mass transit to go to**  **-Work?**  Skip instructions  1-9999: IF entry gt 245 then goto ERR1\_TRANWRKX  ELSE goto TRANSUB  0,DK,RF: Goto TRANSCHX | Delete variable |
| 20B | TRANSIT | New question on which CU members (with ages equal to or greater than 5) use mass transit. This question set-up is similar to that for school meals – set up a follow-up grid asking the transit questions (TRANAMTX, TRANPD, TRANDAYX, AMTRAK, AMTRAKX, TRANSUB, TRANSUBX) for each member selected in TRANSIT | N/A | **What are the names of all household members who use mass transit?**   * Enter line numbers for all that apply, separate with commas  1. Person 1 2. Person 2   …   1. Person 30   Special instructions:  List CU members with AGE ge 5.  Skip instructions:  1-30: goto TRANAMTX for first person selected  DK, REF: goto S20B\_END |
| 20B | TRANAMTX | New question asked for each member selected in TRANSIT | N/A | **What is ^NAME’s usual out-of-pocket cost?**   * Select time period (per day, week, or month) on next screen   Skip instructions:  1-9999: goto TRANPD  0, DK, REF: goto TRANSUB |
| 20B | TRANPD | New question asked for each member selected in TRANSIT | N/A | * Select time period  1. Day 2. Week 3. Month   Skip instructions:  1: goto TRANDAYX  2-3, DK, REF: goto AMTRAK |
| 20B | TRANDAYX | New question asked for each member selected in TRANSIT – if the frequency reported in TRANPD is daily (1) | n/a | **How many days per week usually?**  Skip instructions:  1-7, DK, REF: goto AMTRAK |
| 20B | AMTRAK | New question asked for each member selected in TRANSIT | N/A | **Is any of the ^TRANAMTX ^TRANPD for Amtrak?**   1. Yes 2. No   TRANAMTX fill instructions:  IF TRANAMTX= DK or REF fill “**amount**” ELSE FILL entry in TRANAMTX  TRANPD fill instructions:  IF TRANPD=1, fill “**per day**”  ELSEIF TRANPD=2, fill “**per week**”  ELSEIF TRANPD=3, fill “**per month**”  ELSE leave blank  Skip instructions:  1: goto AMTRAKX  2, DK, REF: Goto TRANSUB |
| 20B | AMTRAKX | New question asked for each member selected in TRANSIT – if response to AMTRAK is yes | n/a | **How much?**   * Enter dollar amount ^TRANPD   TRANPD fill instructions:  IF TRANPD=1, fill “per day”  ELSEIF TRANPD=2, fill “per week”  ELSEIF TRANPD=3, fill “per month”  ELSE leave blank  Skip instructions:  Goto TRANSUB |
| 20B | TRANSUB | * Change question to a member level-question * Update skip instructions due to new question pattern | **Did you receive a transit subsidy?**   1. Yes 2. No   Skip instructions:  1: goto TRANSUBX  2, DK, REF: **goto TRANSCHX** | **Did ^NAME receive a transit subsidy?**   1. Yes 2. No   Skip instructions:  1: goto TRANSUBX  2, DK, REF: **If no more persons goto S20B\_END else goto TRANAMTX for the next person** |
| 20B | TRANSUBX | * Change question to a member level-question * Update skip instructions due to new question pattern | **What is the usual monthly amount?**  Skip instructions:  **goto TRANSCHX** | **What is the usual monthly amount?**  Skip instructions:  **If no more persons goto S20B\_END else goto TRANAMTX for the next person** |
| 20B | TRANSCHX | Delete question | **What is the usual MONTHLY cost to use mass transit to go to –**  **School?**  Skip instructions:  goto TRANOTHX | Delete variable. |
| 20B | TRANOTHX | Delete question | **What is the usual MONTHLY cost to use mass transit to go to –**  **Other places?**  Skip instructions:  goto S20B\_END | Delete variable. |

**Section 21A changes**

| **CEQ Section** | **CEQ CAPI Variable** | **Change Detail** | **201607 Wording/Specification** | **201704 Wording/Specification** |
| --- | --- | --- | --- | --- |
| 21A | SALARYB | Change beginning value from $0 to $1 (changes in **red**) | **Could you tell me which range on CARD A best reflects ^YourNames total wages and salaries for ALL JOBS during the PAST 12 MONTHS?**   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   Skip instructions:  goto GROSPAYX | **Could you tell me which range on CARD A best reflects ^YourNames total wages and salaries for ALL JOBS during the PAST 12 MONTHS?**   1. **$1**-$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   Skip instructions:  goto GROSPAYX |
| 21A | SEMPFRMX | Remove zero from range of allowable values (changes in **red**) | **What was the amount?**  (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  Skip instructions:  -999,999,999-999,999,999: IF SEMPFRMX lt 1 or gt 200000 then goto ERR1\_SEMPFRMX  ELSE goto SOCSRRET  DK, REF: goto SEMPFRMB | **What was the amount?**  (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  Skip instructions:  -999,999,999 thru -1 and 1-999,999,999: **IF SEMPFRMX=0 goto CK\_SEMPFRMX**  **ELSE**IF SEMPFRMX lt 1 or gt 200000 then goto ERR1\_SEMPFRMX  ELSE goto SOCSRRET  DK, REF: goto SEMPFRMB |
| 21A | CK\_SEMPFRMX | New hard error message if zero is entered on SEMPFRMX. | N/A | * ZERO IS NOT AN ALLOWED VALUE   IF THERE WAS NO NET INCOME OR LOSS, ENTER 1  Skip instructions:  go back to SEMPFRMX |
| 21A | SEMPFRMB | Change beginning value from $0 to $1 (changes in **red**) | **Could you tell me which range on CARD A best reflects ^YourNames income or loss from self-employment during the PAST 12 MONTHS?**   1. Loss 2. **$0**-$4,999 3. $5,000-$9,999 4. $10,000-$14,999 5. $15,000-$19,999 6. $20,000-$29,999 7. $30,000-$39,999 8. $40,000-$49,999 9. $50,000-$69,999 10. $70,000-$89,999 11. $90,000-$119,999 12. $120,000 and over   Skip instructions:  goto SOCSRRET | **Could you tell me which range on CARD A best reflects ^YourNames income or loss from self-employment during the PAST 12 MONTHS?**   1. Loss 2. **$1**-$4,999 3. $5,000-$9,999 4. $10,000-$14,999 5. $15,000-$19,999 6. $20,000-$29,999 7. $30,000-$39,999 8. $40,000-$49,999 9. $50,000-$69,999 10. $70,000-$89,999 11. $90,000-$119,999 12. $120,000 and over   Skip instructions:  goto SOCSRRET |
| 21A | SSIB | Change beginning value from $0 to $1 (changes in **red**) | **Could you tell me which range on CARD C best reflects the amount ^YouName received in Supplemental Security income 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   Skip instructions:  goto INDRETAC | **Could you tell me which range on CARD C best reflects the amount ^YouName received in Supplemental Security income during the past 12 months?**   1. **$1**-$999 2. $1,000-$1,999 3. $2,000-$2,999 4. $3,000-$3,999 5. $4,000-$4,999 6. $5,000-$9,999 7. $10,000-$14,999 8. $15,000-$19,999 9. $20,000-$29,999 10. $30,000-$39,999 11. $40,000-$49,999 12. $50,000 and over   Skip instructions:  goto INDRETAC |

**Section 21B changes**

| **CEQ Section** | **CEQ CAPI Variable** | **Change Detail** | **201607 Wording/Specification** | **201704 Wording/Specification** |
| --- | --- | --- | --- | --- |
| 21B | INTRDVB | Change beginning value from $0 to $1 (changes in **red**) | **Could you tell me which range on CARD C best reflects the amount ^YOU\_ANYMEM received in interest or dividends 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   Skip instructions:  goto NETRENT | **Could you tell me which range on CARD C best reflects the amount ^YOU\_ANYMEM received in interest or dividends during the PAST 12 MONTHS?**   1. **$1**-$999 2. $1,000-$1,999 3. $2,000-$2,999 4. $3,000-$3,999 5. $4,000-$4,999 6. $5,000-$9,999 7. $10,000-$14,999 8. $15,000-$19,999 9. $20,000-$29,999 10. $30,000-$39,999 11. $40,000-$49,999 12. $50,000 and over   Skip instructions:  goto NETRENT |
| 21B | NETRENTX | Remove zero from range of allowable values (changes in **red**) | **What was the amount?**   * The net amount is the total amount after expenses.   If net income was a loss, precede amount with a ‘-‘  Breakeven = 1  Skip instructions:  -999999999-999999999: IF (NETRENTX lt -150,000 or gt 48,000) **or (NETRENTX=0)** then goto ERR1\_NETRENTX  ELSE goto ROYEST  DK, REF: goto NETRENTB | **What was the amount?**   * The net amount is the total amount after expenses.   If net income was a loss, precede amount with a ‘-‘  Breakeven = 1  Skip instructions:  -999999999-999999999: **IF NETRENTX=0 then goto CK\_NETRENTX**  **ELSE**IF (NETRENTX lt -150,000 or gt 48,000) then goto ERR1\_NETRENTX  ELSE goto ROYEST  DK, REF: goto NETRENTB |
| 21B | CK\_NETRENTX | New hard error message if zero is entered on NETRENTX. | N/A | * ZERO IS NOT AN ALLOWED VALUE   IF THERE WAS NO NET INCOME OR LOSS, ENTER 1  Skip instructions:  go back to NETRENTX |
| 21B | NETRENTB | Change beginning value from $0 to $1 (changes in **red**) | **Could you tell me which range on CARD C best reflects the total net rental income or loss during the PAST 12 MONTHS?**   1. Loss 2. **$0**-$999 3. $1,000-$1,999 4. $2,000-$2,999 5. $3,000-$3,999 6. $4,000-$4,999 7. $5,000-$9,999 8. $10,000-$14,999 9. $15,000-$19,999 10. $20,000-$29,999 11. $30,000-$39,999 12. $40,000-$49,999 13. $50,000 and over   Skip instructions:  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?**   1. Loss 2. **$1**-$999 3. $1,000-$1,999 4. $2,000-$2,999 5. $3,000-$3,999 6. $4,000-$4,999 7. $5,000-$9,999 8. $10,000-$14,999 9. $15,000-$19,999 10. $20,000-$29,999 11. $30,000-$39,999 12. $40,000-$49,999 13. $50,000 and over   Skip instructions:  goto ROYEST |
| 21B | ROYESTB | Change beginning value from $0 to $1 (changes in **red**) | **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   Skip instructions:  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. **$1**-$999 2. $1,000-$1,999 3. $2,000-$2,999 4. $3,000-$3,999 5. $4,000-$4,999 6. $5,000-$9,999 7. $10,000-$14,999 8. $15,000-$19,999 9. $20,000-$29,999 10. $30,000-$39,999 11. $40,000-$49,999 12. $50,000 and over   Skip instructions:  goto RETSURV |
| 21B | RETSURVB | Change beginning value from $0 to $1 (changes in **red**) | **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   Skip instructions:  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. **$1**-$999 2. $1,000-$1,999 3. $2,000-$2,999 4. $3,000-$3,999 5. $4,000-$4,999 6. $5,000-$9,999 7. $10,000-$14,999 8. $15,000-$19,999 9. $20,000-$29,999 10. $30,000-$39,999 11. $40,000-$49,999 12. $50,000 and over   Skip instructions:  goto OTHREG |
| 21B | OTHREGB | Change beginning value from $0 to $1 (changes in **red**) | **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   Skip instructions:  goto LUMPSUM | **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. **$1**-$999 2. $1,000-$1,999 3. $2,000-$2,999 4. $3,000-$3,999 5. $4,000-$4,999 6. $5,000-$9,999 7. $10,000-$14,999 8. $15,000-$19,999 9. $20,000-$29,999 10. $30,000-$39,999 11. $40,000-$49,999 12. $50,000 and over   Skip instructions:  goto LUMPSUM |
| 21B | LUMPSUMB | Change beginning value from $0 to $1 (changes in **red**) | **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 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   Skip instructions:  goto OTHERINC | **Could you tell me which range on CARD C best reflects the total lump sum payments during the PAST 12 MONTHS?**   1. **$1**-$999 2. $1,000-$1,999 3. $2,000-$2,999 4. $3,000-$3,999 5. $4,000-$4,999 6. $5,000-$9,999 7. $10,000-$14,999 8. $15,000-$19,999 9. $20,000-$29,999 10. $30,000-$39,999 11. $40,000-$49,999 12. $50,000 and over   Skip instructions:  goto OTHERINC |
| 21B | OTHERINC | Update skip instructions due to deletion of EITC (changes in **red**) | **DURING THE PAST 12 MONTHS –**  **Did ^YOU\_ANYMEM 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   Skip instructions:  1: goto OTHRINCX  2, DK, REF: goto **EITC** | **DURING THE PAST 12 MONTHS –**  **Did ^YOU\_ANYMEM 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   Skip instructions:  1: goto OTHRINCX  2, DK, REF: goto **MISCTAX** |
| 21B | OTHRINCX | Update skip instructions due to deletion of EITC (changes in **red**) | **What was the total amount received ^ByAll?**  Skip instructions:  1-99,999,999: IF OTHRINCX lt 100 or gt 23404 then goto ERR1\_OTHRINCX  ELSE goto **EITC**  DK, REF: goto OTHRINCB | **What was the total amount received ^ByAll?**  Skip instructions:  1-99,999,999: IF OTHRINCX lt 100 or gt 23404 then goto ERR1\_OTHRINCX  ELSE goto **MISCTAX**  DK, REF: goto OTHRINCB |
| 21B | OTHRINCB | * Update skip instructions due to deletion of EITC (changes in **red**) * Change beginning value from $0 to $1 (changes in **red**) | **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   Skip instructions:  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. **$1**-$999 2. $1,000-$1,999 3. $2,000-$2,999 4. $3,000-$3,999 5. $4,000-$4,999 6. $5,000-$9,999 7. $10,000-$14,999 8. $15,000-$19,999 9. $20,000-$29,999 10. $30,000-$39,999 11. $40,000-$49,999 12. $50,000 and over   Skip instructions:  goto **EITC** |
| 21B | EITC | Delete question | **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 ^YOU\_ANYMEM claim an Earned Income Tax Credit on your federal income tax return?**   1. Yes 2. No   Skip instructions:  goto MISCTAX | Delete question. |
| 21B | WELFAREB | Change beginning value from $0 to $1 (changes in **red**) | **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   Skip instructions:  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. **$1**-$999 2. $1,000-$1,999 3. $2,000-$2,999 4. $3,000-$3,999 5. $4,000-$4,999 6. $5,000-$9,999 7. $10,000-$14,999 8. $15,000-$19,999 9. $20,000-$29,999 10. $30,000-$39,999 11. $40,000-$49,999 12. $50,000 and over   Skip instructions:  goto MEALSPAY |

**Section 22 changes**

| **CEQ Section** | **CEQ CAPI Variable** | **Change Detail** | **201607 Wording/Specification** | **201704 Wording/Specification** |
| --- | --- | --- | --- | --- |
| 22 | LIAINTRO | Update skip instructions due to new screener question (IRA) | **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.**   1. Enter 1 to continue   Skip instructions:  **goto IRAX** | **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.**   1. Enter 1 to continue   Skip instructions:  **goto IRA** |
| 22 | IRA | New screener questions for retirement accounts | N/A | **Do ^YOU\_ANYMEM have any retirement accounts such as 401(k)s, IRAs, Thrift Savings Plans?**   1. Yes 2. No   Skip instructions:  1: goto IRAX  2, DK, REF: goto DEFBENRP |
| 22 | IRAX | Change minimum value from 0 to 1 (since there’s now a screener question) | **As of TODAY --**  **What is the total value of all retirement accounts such as 401(k)s, IRAs, Thrift Savings Plans that ^YOU\_YRCU ^own\_owns?**   * If no retirement accounts, enter 0   Skip instructions:  **0-999999999999**: goto IRAYRX  DK, REF: goto IRAB | **As of TODAY --**  **What is the total value of all retirement accounts such as 401(k)s, IRAs, Thrift Savings Plans that ^YOU\_YRCU ^own\_owns?**  Skip instructions:  **1-999999999999**: goto IRAYRX  DK, REF: goto IRAB |
| 22 | IRAB | Change beginning value from $0 to $1 | **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?**   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   Skip instructions:  1-6: goto IRAYRX  DK, REF: goto DEFBENRP | **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?**   1. **$1**-$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   Skip instructions:  1-6: goto IRAYRX  DK, REF: goto DEFBENRP |
| 22 | IRAYRX | Update skip instructions due to new follow-up question if IRAYRX=0 | **What was the total value of all retirement accounts ONE YEAR AGO TODAY?**  Skip instructions:  **0-999999999999: goto DEFBENRP**  DK, REF: goto IRAYRB | **What was the total value of all retirement accounts ONE YEAR AGO TODAY?**  Skip instructions:  **0: goto IRAYR**  **1-999999999999: goto DEFBENRP**  DK, REF: goto IRAYRB |
| 22 | IRAYRB | Change beginning value from $0 to $1 | **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 3. $10,000-$49,999 4. $50,000-$199,999 5. $200,000-$449,999 6. $450,000 and over   Skip instructions:  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. **$1**-$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   Skip instructions:  goto DEFBENRP |
| 22 | IRAYR | New follow-up question if IRAYRX=0 | N/A | **Did ^YOU\_ANYMEM have any retirement accounts such as 401(k)s, IRAs, Thrift Savings Plans ONE YEAR AGO TODAY?**   1. Yes 2. No   Skip instructions:  goto DEFBENRP |
| 22 | STOCKB | * Change beginning value from $0 to $1 * Updated skip instructions due to new LIQUID screener | **Could you tell me which range on CARD D best reflects the total value of all directly-held stocks, bonds, and mutual funds ^Retirement?**   * 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   Skip instructions:  1-6: goto STOCKYRX  DK, REF: 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 ^Retirement?**   * Include US savings bonds  1. **$1**-$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   Skip instructions:  1-6: goto STOCKYRX  DK, REF: goto **LIQUID** |
| 22 | STOCKYRX | Updated skip instructions due to new LIQUID screener AND new follow-up question if STOCKYRX=0 | **What was the total value of all directly-held stocks, bonds, and mutual funds ^Retirement ONE YEAR AGO TODAY?**   * Include US savings bonds   Skip instructions:  **0-999999999999: Goto LIQUIDX**  DK, REF: goto STOCKYRB | **What was the total value of all directly-held stocks, bonds, and mutual funds ^Retirement ONE YEAR AGO TODAY?**   * Include US savings bonds   Skip instructions:  **0: Goto STOCKYR**  **1-999999999999: Goto LIQUID**  DK, REF: goto STOCKYRB |
| 22 | STOCKYRB | * Change beginning value from $0 to $1 * Updated skip instructions due to new LIQUID screener | **Could you tell me which range on CARD D best reflects the total value of all directly-held stocks, bonds, and mutual funds ^Retirement ONE YEAR AGO TODAY?**   * 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   Skip instructions:  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 ^Retirement ONE YEAR AGO TODAY?**   * Include US savings bonds  1. **$1**-$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   Skip instructions:  goto **LIQUID** |
| 22 | STOCKYR | New follow-up question if STOCKYRX=0 | N/A | **Did ^YOU\_ANYMEM have any directly-held stocks, bonds, or mutual funds ^Retirement ONE YEAR AGO TODAY?**   * Include U.S. savings bonds  1. Yes 2. No   Skip instructions:  goto LIQUID |
| 22 | LIQUID | New screener questions for banking accounts | N/A | **Do ^YOU\_ANYMEM have any checking, savings, money market accounts, or certificates of deposit or CDs?**   1. Yes 2. No   Skip instructions:  1: goto LIQUIDX  2, DK, REF: goto WHOLIF |
| 22 | LIQUIDX | Change minimum value from 0 to 1 (since there’s now a screener question) | **As of TODAY --**  **What is the total value of all checking, savings, money market accounts, and certificates of deposit or CDs ^YOU\_YRCU ^have\_has2?**  Skip instructions:  **0-999999999999**: Goto LIQUIDYRX  DK, REF: goto LIQUIDB | **As of TODAY --**  **What is the total value of all checking, savings, money market accounts, and certificates of deposit or CDs ^YOU\_YRCU ^have\_has2?**  Skip instructions:  **1-999999999999**: Goto LIQUIDYRX  DK, REF: goto LIQUIDB |
| 22 | LIQUIDB | Change beginning value from $0 to $1 | **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?**   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   Skip instructions:  1-6: Goto LIQUDYRX  DK, RF: Goto WHOLIF | **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?**   1. $**1**-$499 2. $500-$999 3. $1,000-$2,499 4. $2,500-$9,999 5. $10,000-$34,999 6. $35,000 and over   Skip instructions:  1-6: Goto LIQUDYRX  DK, RF: Goto WHOLIF |
| 22 | LIQUDYRX | Updated skip instructions due to new follow-up question if LIQUDYRX=0 | **What was the total value of all checking, savings, money market accounts, and certificates of deposit or CDs ONE YEAR AGO TODAY?**  Skip instructions:  **0-999999999999**: Goto WHOLIF  DK, REF: goto LIQUDYRB | **What was the total value of all checking, savings, money market accounts, and certificates of deposit or CDs ONE YEAR AGO TODAY?**  Skip instructions:  **0: goto LIQUDYR**  **1-999999999999**: Goto WHOLIF  DK, REF: goto LIQUDYRB |
| 22 | LIQUDYRB | Change beginning value from $0 to $1 | **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 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 6. $35,000 and over   Skip instructions:  Goto WHOLIF | **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 ONE YEAR AGO TODAY?**   1. $**1**-$499 2. $500-$999 3. $1,000-$2,499 4. $2,500-$9,999 5. $10,000-$34,999 6. $35,000 and over   Skip instructions:  Goto WHOLIF |
| 22 | LIQUDYR | New follow-up question if LIQUDYRX=0 | n/a | **Did ^YOU\_ANYMEM have any checking, savings money market accounts, or certificates of deposit or CDs ONE YEAR AGO TODAY?**   1. Yes 2. No   Skip instructions:  goto WHOLIF |
| 22 | WHOLIFB | Change beginning value from $0 to $1 | **Could you tell me which range on CARD E best reflects 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  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   Skip instructions:  1-6: Goto WHLFYRX  DK,RF: Goto OTHAST | **Could you tell me which range on CARD E best reflects 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  1. $**1**-$499 2. $500-$999 3. $1,000-$2,499 4. $2,500-$9,999 5. $10,000-$34,999 6. $35,000 and over   Skip instructions:  1-6: Goto WHLFYRX  DK,RF: Goto OTHAST |
| 22 | WHLFYRX | Updated skip instructions due to new follow-up question if WHLFYRX=0 | **What was the total surrender value of these policies ONE YEAR AGO TODAY?**   * 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   Skip instructions:  **0-999999999999**: Goto OTHAST  DK, REF: goto WHLFYRB | **What was the total surrender value of these policies ONE YEAR AGO TODAY?**   * 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   Skip instructions:  **0: goto WHLFYR**  **1-999999999999**: Goto OTHAST  DK, REF: goto WHLFYRB |
| 22 | WHLFYRB | Change beginning value from $0 to $1 | **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 * 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   Skip instructions:  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 * Enter the amount that can be borrowed or withdrawn prior to death, NOT the benefit upon death of the insured  1. $**1**-$499 2. $500-$999 3. $1,000-$2,499 4. $2,500-$9,999 5. $10,000-$34,999 6. $35,000 and over   Skip instructions:  Goto OTHAST |
| 22 | WHLFYR | New follow-up question if WHLFYRX=0 | N/A | **Did ^YOU\_YRCU 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 ONE YEAR AGO TODAY?**   * Also include universal life and variable life insurance * Do NOT include term life insurance or other policies that only have a benefit upon death or disability  1. Yes 2. No   Skip instructions:  goto OTHAST |
| 22 | OTHASTB | Change beginning value from $0 to $1 | **Could you tell me which range on CARD D best reflects the total value of these other financial assets?**   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   Skip instructions:  1-6: Goto OTHSTYRX  DK, RF: Goto CREDIT | **Could you tell me which range on CARD D best reflects the total value of these other financial assets?**   1. $**1**-$499 2. $500-$999 3. $1,000-$2,499 4. $2,500-$9,999 5. $10,000-$34,999 6. $35,000 and over   Skip instructions:  1-6: Goto OTHSTYRX  DK, RF: Goto CREDIT |
| 22 | OTHSTYRX | Updated skip instructions due to new follow-up question if OTHSTYRX=0 | **What was the total value of these other financial assets ONE YEAR AGO TODAY?**  Skip instructions:  **0-999999999999**: Goto CREDIT  DK,RF: Goto OTHSTYRB | **What was the total value of these other financial assets ONE YEAR AGO TODAY?**  Skip instructions:  **0: goto OTHSTYR**  **1-999999999999**: Goto CREDIT  DK,RF: Goto OTHSTYRB |
| 22 | OTHSTYRB | Change beginning value from $0 to $1 | **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   Skip instructions:  Goto CREDIT | **Could you tell me which range on CARD D best reflects the total value of these other financial assets ONE YEAR AGO TODAY?**   1. $**1**-$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   Skip instructions:  Goto CREDIT |
| 22 | OTHSTYR | New follow-up question if OTHSTYRX=0 | N/A | **Did ^YOU\_YRCU have any other financial assets, such as annuities, trusts, and royalties ONE YEAR AGO TODAY?**   1. Yes 2. No   Skip instructions:  Goto CREDIT |
| 22 | CREDIT | Reword question as shown | **As of TODAY --**  **^DoDoes\_C ^YOU\_YRCU have a balance on any major credit cards including store cards and gas cards?**   1. Yes 2. No   Skip instructions:  1: Goto CREDITX  2,DK,RF: Goto STUDNT | **^DoDoes\_C ^YOU\_YRCU have any credit cards including store cards and gas cards?**   1. Yes 2. No   Skip instructions:  1: Goto CREDITX  2,DK,RF: Goto STUDNT |
| 22 | CREDITX | * Add “as of TODAY” to the end of the question * Lower minimum value to 0 (due to revision of screener question) | **What is the total amount owed on all cards?**  Skip instructions:  **1-999999999999**: Goto CREDTYRX  DK, RF: Goto CREDITB | **What is the total amount owed on all cards as of TODAY?**  Skip instructions:  **0-999999999999**: Goto CREDTYRX  DK, RF: Goto CREDITB |
| 22 | CREDITB | * Remove “major” from the question wording * Change beginning value from $0 to $1 | **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?**   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   Skip instructions:  1-6: Goto CREDTYRX  DK,RF: Goto CREDFINX | **Could you tell me which range on CARD E best reflects the total amount owed on all credit cards including store cards and gas cards?**   1. $**1**-$499 2. $500-$999 3. $1,000-$2,499 4. $2,500-$9,999 5. $10,000-$34,999 6. $35,000 and over   Skip instructions:  1-6: Goto CREDTYRX  DK,RF: Goto CREDFINX |
| 22 | CREDTYRX | Updated skip instructions due to new follow-up question if CREDTYRX=0 | **What was the total amount owed on all cards ONE YEAR AGO TODAY?**  Skip instructions:  **0-999999999999: Goto CREDFINX**  DK, RF: Goto CREDYRB | **What was the total amount owed on all cards ONE YEAR AGO TODAY?**  Skip instructions:  **0: goto CREDYR**  **1-999999999999: Goto CREDFINX**  DK, RF: Goto CREDYRB |
| 22 | CREDYRB | Change beginning value from $0 to $1 | **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?**   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   Skip instructions:  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?**   1. $**1**-$499 2. $500-$999 3. $1,000-$2,499 4. $2,500-$9,999 5. $10,000-$34,999 6. $35,000 and over   Skip instructions:  Goto CREDFINX |
| 22 | CREDYR | New follow-up question if CREDYRX=0 | N/A | **Did ^YOU\_YRCU have any credit cards including store cards and gas cards ONE YEAR AGO TODAY?**   1. Yes 2. No   Skip instructions:  goto CREDFINX |
| 22 | STUDNTB | Change beginning value from $0 to $1 | **Could you tell me which range on CARD E best reflects the total amount owed on all student loans?**   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   Skip instructions:  1-6: Goto STDNTYRX  DK, RF: Goto STUDFINX | **Could you tell me which range on CARD E best reflects the total amount owed on all student loans?**   1. $**1**-$499 2. $500-$999 3. $1,000-$2,499 4. $2,500-$9,999 5. $10,000-$34,999 6. $35,000 and over   Skip instructions:  1-6: Goto STDNTYRX  DK, RF: Goto STUDFINX |
| 22 | STDNTYRX | Updated skip instructions due to new follow-up question if STDNTYRX=0 | **What was the total amount owed on all student loans ONE YEAR AGO TODAY?**  Skip instructions:  **0-999999999999**: Goto STUDFINX  DK, RF: Goto STDNTYRB | **What was the total amount owed on all student loans ONE YEAR AGO TODAY?**  Skip instructions:  **0: goto STDNTYR**  **1-999999999999**: Goto STUDFINX  DK, RF: Goto STDNTYRB |
| 22 | STDNTYRB | Change beginning value from $0 to $1 | **Could you tell me which range on CARD E best reflects the total amount owed on all student loans 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 6. $35,000 and over   Skip instructions:  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?**   1. $**1**-$499 2. $500-$999 3. $1,000-$2,499 4. $2,500-$9,999 5. $10,000-$34,999 6. $35,000 and over   Skip instructions:  Goto STUDFINX |
| 22 | STDNTYR | New follow-up question if STDNTYRX=0 | N/A | **Did ^YOU\_YRCU have any student loans ONE YEAR AGO TODAY?**   1. Yes 2. No   Skip instructions:  goto STUDFINX |
| 22 | OTHLONB | Change beginning value from $0 to $1 | **Could you tell me which range on CARD E best reflects the total amount owed on all other loans?**   * Do not include mortgages, home equity loans, or vehicle loans  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   Skip instructions:  1-6: Goto OTHLNYRX  DK,RF: Goto OTHFINX | **Could you tell me which range on CARD E best reflects the total amount owed on all other loans?**   * Do not include mortgages, home equity loans, or vehicle loans  1. $**1**-$499 2. $500-$999 3. $1,000-$2,499 4. $2,500-$9,999 5. $10,000-$34,999 6. $35,000 and over   Skip instructions:  1-6: Goto OTHLNYRX  DK,RF: Goto OTHFINX |
| 22 | OTHLNYRX | Updated skip instructions due to new follow-up question if OTHLNYRX=0 | **What was the total amount owed on all other loans ONE YEAR AGO TODAY?**   * Do not include mortgages, home equity loans, or vehicle loans   Skip instructions:  **0-999999999999**: Goto OTHFINX  DK,RF: Goto OTHLNYRB | **What was the total amount owed on all other loans ONE YEAR AGO TODAY?**   * Do not include mortgages, home equity loans, or vehicle loans   Skip instructions:  **0: goto OTHLNYR**  **1-999999999999**: Goto OTHFINX  DK,RF: Goto OTHLNYRB |
| 22 | OTHLNYRB | Change beginning value from $0 to $1 | **Could you tell me which range on CARD E best reflects the total amount owed on all other loans ONE YEAR AGO TODAY?**   * Do not include mortgages, home equity loans, or vehicle loans  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   Skip instructions:  Goto OTHFINX | **Could you tell me which range on CARD E best reflects the total amount owed on all other loans ONE YEAR AGO TODAY?**   * Do not include mortgages, home equity loans, or vehicle loans  1. $**1**-$499 2. $500-$999 3. $1,000-$2,499 4. $2,500-$9,999 5. $10,000-$34,999 6. $35,000 and over   Skip instructions:  Goto OTHFINX |
| 22 | OTHLNYR | New follow-up question if OTHLNYRX=0 | N/A | **Did ^YOU\_YRCU have any other debt such as medical loans or personal loans ONE YEAR AGO TODAY?**   * Do not include mortgages, home equity loans, or vehicle loans  1. Yes 2. No   Skip instructions:  Goto OTHFINX |