

Income (IN) Section

IN01

====

For the next questions, it might be useful to have out some of the family's financial records, such as a copy of the family's tax forms or materials used to complete the tax form, such as year end bank statements, financial summaries, pay stubs, W-2 forms, and the like.

-----  
| NOTE: FOR ALL DOLLAR AMOUNT RANGE CHECKS, ALLOW |  
THE ENTRY OF DOLLARS AND CENTS.

LOOP\_01

=====

-----  
| FOR EACH ELEMENT IN THE RU-MEMBERS-ROSTER, |  
ASK BOX\_00 - END\_LP01

-----  
| LOOP DEFINITION: LOOP\_01 DETERMINES WHICH RU |  
| MEMBERS HAVE OR WILL FILE A 2001 FEDERAL INCOME |  
| TAX FORM. IF A JOINT RETURN WAS OR WILL BE FILED, |  
| IT DETERMINES WHO IS THE SECONDARY FILER. THIS |  
| LOOP CYCLES ON PERSONS WHO MEET THE FOLLOWING |  
| CONDITION: |

| - PERSON IS A CURRENT ROUND RU MEMBER (INCLUDES |  
DECEASED AND INSTITUTIONALIZED RU MEMBERS)

-----  
| NOTE: IN ROUND 3, ALL YEAR REFERENCES WERE '2000'. |  
IN ROUND 5, ALL YEAR REFERENCES WERE '2001'.

BOX\_00  
=====

```
-----  
| IF PERSON BEING LOOPED ON IS FLAGGED AS          |  
| 'SECONDARY FILER ON JOINT FEDERAL TAX RETURN', GO |  
| TO END_LP01                                       |  
-----  
  
-----  
| OTHERWISE, CONTINUE WITH IN02                       |  
-----
```

IN02  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

Has (PERSON) filed a 2001 Federal income tax return?

YES .....	1	{IN04}
NO .....	2	
REF .....	-7	
DK .....	-8	

PRESS F1 FOR DEFINITION OF TAX RETURN.

IN03  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

Will (PERSON) file a 2001 Federal income tax return?

YES .....	1	
NO .....	2	{END_LP01}
REF .....	-7	{END_LP01}
DK .....	-8	{END_LP01}

PRESS F1 FOR DEFINITION OF TAX RETURN.

IN04  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

What {was/will be} (PERSON)'s filing status ...

single; .....	1	{IN06}
married filing joint return; .....	2	
married filing separately; .....	3	{IN06}
head of household with qualifying person; or .....	4	{IN06}
qualifying widow(er) with dependent children? .....	5	{IN06}
REF .....	-7	{IN06}
DK .....	-8	{IN06}

[Code One]

PRESS F1 FOR DEFINITION OF RESPONSE CATEGORIES.

-----  
| DISPLAY 'was' IF IN02 IS CODED '1' (YES). DISPLAY |  
'will be' IF IN03 IS CODED '1' (YES).

-----  
| FLAG PERSON BEING LOOPED ON AS 'PRIMARY FILER ON |  
FEDERAL TAX RETURN'.

IN05  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

Who is the other taxpayer that (PERSON) is filing jointly with?

TO TURN CHECK MARK ON/OFF, USE ARROW KEYS, PRESS ENTER.  
TO LEAVE, PRESS ESC.

- [1. First Name, [Middle Name], Last name-65]
- [2. First Name, [Middle Name], Last name-65]
- [3. First Name, [Middle Name], Last name-65]

[Code One]

PRESS F1 FOR DEFINITION OF 'FILING JOINTLY'.

-----  
| ROSTER DEFINITION: THIS ITEM USES THE |  
| RU-MEMBERS-ROSTER TO DISPLAY ALL PERSONS WHO MEET |  
| THE FOLLOWING CONDITIONS: |

- PERSON IS A CURRENT ROUND RU MEMBER (INCLUDES  
DECEASED AND INSTITUTIONALIZED RU MEMBERS)
- PERSON IS NOT ALREADY FLAGGED AS A 'PRIMARY  
FILER ON FEDERAL TAX RETURN'
- PERSON IS NOT ALREADY FLAGGED AS A 'SECONDARY  
FILER ON JOINT FEDERAL TAX RETURN'

-----  
| DISPLAY 'PERSON NOT IN RU' AS THE LAST ENTRY |  
| ON THE ROSTER. |

-----  
| FLAG PERSON SELECTED AT IN05 AS 'SECONDARY FILER |  
ON JOINT FEDERAL TAX RETURN'.

IN06  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

{Did/Will} (PERSON) claim any dependents on (PERSON)'s Federal tax  
return?

YES .....	1
NO .....	2 {IN09}
REF .....	-7 {IN09}
DK .....	-8 {IN09}

PRESS F1 FOR DEFINITION OF DEPENDENTS.

-----  
| DISPLAY 'Did' IF IN02 IS CODED '1' (YES). DISPLAY |  
'Will' IF IN03 IS CODED '1' (YES).

IN07

=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

Who {is/will be} listed as (PERSON)'s dependents?

TO TURN CHECK MARK ON/OFF, USE ARROW KEYS, PRESS ENTER.  
TO LEAVE, PRESS ESC.

- [1. First Name, [Middle Name], Last name-65]
- [2. First Name, [Middle Name], Last name-65]
- [3. First Name, [Middle Name], Last name-65]

[Code All That Apply]

-----  
| ROSTER DEFINITION: THIS ITEM USES THE  
| RU-MEMBERS-ROSTER TO DISPLAY ALL PERSONS WHO MEET  
| THE FOLLOWING CONDITIONS:

- PERSON IS A CURRENT ROUND RU MEMBER (INCLUDES  
DECEASED AND INSTITUTIONALIZED RU MEMBERS)
- PERSON IS NOT CURRENTLY BEING LOOPED ON

-----  
| DISPLAY 'PERSON(S) NOT IN RU' AS THE LAST ENTRY  
| ON THE ROSTER.

-----  
| DISPLAY 'is' IF IN02 IS CODED '1' (YES). DISPLAY  
'will be' IF IN03 IS CODED '1' (YES).

BOX\_IN07

=====

-----  
| IF 'PERSON(S) NOT IN RU' SELECTED AT IN07,  
CONTINUE WITH IN08

-----  
OTHERWISE, GO TO IN09

IN08  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

How many of the dependents that are being claimed on (PERSON)'s  
Federal income tax return live outside of this household?

[Enter Number of Dependents] .....  
REF ..... -7  
DK ..... -8

PRESS F1 FOR DEFINITION OF HOUSEHOLD.

-----  
SOFT RANGE CHECK: 1-10

IN09  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

{Did/Will} (PERSON) file on the long form (1040), the short  
form 1040A, or the short form 1040EZ?

LONG FORM 1040 ..... 1  
SHORT FORM 1040A ..... 2 {IN16}  
SHORT FORM 1040EZ ..... 3 {END\_LP01}  
OTHER ..... 91  
REF ..... -7 {END\_LP01}  
DK ..... -8 {END\_LP01}

[Code One]

-----  
| DISPLAY 'Did' IF IN02 IS CODED '1' (YES). DISPLAY |  
'Will' IF IN03 IS CODED '1' (YES).

IN10  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

{Did/Will} (PERSON) itemize deductions or take the standard deduction?

IF TAX FORM IS AVAILABLE, HAVE RESPONDENT REFER TO FORM 1040, SCHEDULE A, LINE 28 (ITEMIZED DEDUCTIONS) OR LINE 36 (SCHEDULE A IS NOT COMPLETED) (STANDARD DEDUCTION) TO DETERMINE THE TYPE OF DEDUCTION.

ITEMIZED DEDUCTIONS .....	1	
STANDARD DEDUCTION .....	2	{END_LP01}
REF .....	-7	{END_LP01}
DK .....	-8	{END_LP01}

[Code One]

PRESS F1 FOR DEFINITION OF ITEMIZED AND STANDARD DEDUCTIONS.

-----  
| DISPLAY 'Did' IF IN02 IS CODED '1' (YES). DISPLAY |  
'Will' IF IN03 IS CODED '1' (YES).

IN11  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

{Did/Will} (PERSON) itemize medical expenses?

IF TAX FORM IS AVAILABLE, HAVE RESPONDENT REFER TO FORM 1040, SCHEDULE A, LINE 1 TO SEE IF THERE IS AN ENTRY.

YES .....	1	
NO .....	2	{IN14}
REF .....	-7	{IN14}
DK .....	-8	{IN14}

PRESS F1 FOR DEFINITION OF ITEMIZE MEDICAL EXPENSES.

-----  
| DISPLAY 'Did' IF IN02 IS CODED '1' (YES). DISPLAY |  
'Will' IF IN03 IS CODED '1' (YES).



IN12  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

About how much {was/will be} the total amount (PERSON)  
{claimed/claims} for medical expenses?

IF TAX FORM IS AVAILABLE, HAVE RESPONDENT REFER TO FORM 1040,  
SCHEDULE A, LINE 1 FOR AMOUNT.

[Enter \$ Amount] .....  
REF ..... -7  
DK ..... -8

PRESS F1 FOR DESCRIPTION OF AMOUNTS TO INCLUDE.

-----  
SOFT RANGE CHECK: 0-100,000

-----  
| DISPLAY 'was' AND 'claimed' IF IN02 IS CODED '1' |  
| (YES). DISPLAY 'will be' AND 'claims' IF IN03 IS |  
CODED '1' (YES).

IN13  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

About how much {was/will be} (PERSON)'s net deduction for medical  
and dental expenses?

IF TAX FORM IS AVAILABLE, HAVE RESPONDENT REFER TO FORM 1040,  
SCHEDULE A, LINE 4 FOR AMOUNT.

[Enter \$ Amount] .....  
REF ..... -7  
DK ..... -8

PRESS F1 FOR DEFINITION OF NET DEDUCTION.

-----  
SOFT RANGE CHECK: 0-100,000

-----  
| DISPLAY 'was' IF IN02 IS CODED '1' (YES). DISPLAY |  
'will be' IF IN03 IS CODED '1' (YES).

IN14  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

About how much {was/will be} the total of **all** the itemized  
deduction expenses?

IF TAX FORM IS AVAILABLE, HAVE RESPONDENT REFER TO FORM 1040,  
SCHEDULE A, LINE 28 FOR AMOUNT.

[Enter \$ Amount] .....  
REF ..... -7  
DK ..... -8

-----  
SOFT RANGE CHECK: 0-200,000

-----  
| DISPLAY 'was' IF IN02 IS CODED '1' (YES). DISPLAY |  
'will be' IF IN03 IS CODED '1' (YES).

IN15  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

{Did/Will} (PERSON) claim a deduction for health insurance premiums?

IF TAX FORM IS AVAILABLE, HAVE RESPONDENT REFER TO  
FORM 1040, LINE 28

YES .....	1
NO .....	2
NOT APPLICABLE .....	3
REF .....	-7
DK .....	-8

[Code One]

PRESS F1 FOR DEFINITION OF HEALTH INSURANCE DEDUCTION.

-----  
| DISPLAY 'Did' IF IN02 IS CODED '1' (YES). DISPLAY |  
'Will' IF IN03 IS CODED '1' (YES).

IN16  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

{Did/Will} (PERSON) receive credit for the elderly or disabled?

IF TAX FORM IS AVAILABLE, HAVE RESPONDENT REFER TO  
FORM 1040, LINE 45  
FORM 1040A, LINE 28

YES .....	1
NO .....	2
NOT APPLICABLE .....	3
REF .....	-7
DK .....	-8

[Code One]

PRESS F1 FOR DEFINITION OF ELDERLY OR DISABLED CREDIT.

-----  
| DISPLAY 'Did' IF IN02 IS CODED '1' (YES). DISPLAY |  
'Will' IF IN03 IS CODED '1' (YES).

IN17  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

{Did/Will} (PERSON) receive earned income credits?

IF TAX FORM IS AVAILABLE, HAVE RESPONDENT REFER TO  
FORM 1040, LINE 61a  
FORM 1040A, LINE 39a

YES .....	1
NO .....	2
NOT APPLICABLE .....	3
REF .....	-7
DK .....	-8

[Code One]

PRESS F1 FOR DEFINITION OF EARNED INCOME CREDITS.

-----  
| DISPLAY 'Did' IF IN02 IS CODED '1' (YES). DISPLAY |  
'Will' IF IN03 IS CODED '1' (YES).

END\_LP01  
=====

-----  
| CYCLE ON NEXT PERSON ON THE RU-MEMBERS-ROSTER WHO |  
MEETS THE CONDITIONS STATED IN THE LOOP DEFINITION

-----  
| IF NO OTHER PERSONS MEET THE STATED CONDITIONS, |  
END LOOP\_01 AND CONTINUE WITH BOX\_01

BOX\_01  
=====

-----  
| IF IN02 CODED '1' (YES) OR IN03 CODED '1' (YES) FOR |  
AT LEAST ONE RU MEMBER, CONTINUE WITH LOOP\_02

-----  
OTHERWISE, GO TO IN34

LOOP\_02  
=====

-----  
| FOR EACH ELEMENT IN THE RU-MEMBERS-ROSTER, |  
ASK IN18 - END\_LP02

-----  
| LOOP DEFINITION: LOOP\_02 COLLECTS INFORMATION |  
| ON TAXABLE INCOME FOR EACH RU MEMBER WHO HAS OR |  
| WILL FILE A 2001 FEDERAL TAX RETURN. THIS LOOP |  
| CYCLES ON EACH PERSON ON THE RU-MEMBERS-ROSTER |  
| WHO MEETS THE FOLLOWING CONDITIONS: |  
| |  
| [- PERSON HAS FILED A 2001 FEDERAL INCOME TAX |  
| RETURN (IN02 = 1) |  
| OR |  
| - PERSON WILL FILE A 2001 FEDERAL INCOME TAX |  
| RETURN (IN03 = 1)] |  
| AND |  
| - PERSON FLAGGED AS 'PRIMARY FILER ON FEDERAL TAX |  
RETURN'

IN17A  
=====

OMITTED.

IN18  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}            {NAME OF SECONDARY FILER}

{People get money from many different sources, such as wages and salaries, social security, and interest on savings. The next few questions ask about different sources of income that (READ NAME(S) ABOVE) received in 2001. It would be useful to have out any tax materials that you may have.}

During 2001, how much money did (READ NAME(S) ABOVE) receive from wages or salary, tips, commissions, or bonuses?

IF TAX FORM IS AVAILABLE, HAVE RESPONDENT REFER TO  
FORM 1040, LINE 7  
FORM 1040A, LINE 7  
FORM 1040EZ, LINE 1

[Enter \$ Amount] .....  
REF ..... -7 {IN19}  
DK ..... -8 {IN18A}

PRESS F1 FOR DESCRIPTION OF AMOUNTS TO INCLUDE.

-----  
| DISPLAY 'People get money from many different |  
| sources, such as wages and salaries, social |  
| security, and interest on savings. The next few |  
| questions ask about different sources of income |  
| that (READ NAME(S) ABOVE) received in 2001. It |  
| would be useful to have out any tax materials that |  
| you may have.' IF FIRST CYCLE THROUGH LOOP\_02. |  
OTHERWISE, USE NULL DISPLAY.

-----  
| FOR 'NAME OF SECONDARY FILER', DISPLAY THE |  
| PERSON'S NAME SELECTED AT IN05 DURING LOOP\_01 FOR |  
| THE PRIMARY FILER CURRENTLY BEING ASKED ABOUT. IF |  
| IN05 WAS NOT ASKED IN LOOP\_01 FOR THIS PERSON, USE |  
A NULL DISPLAY.

-----  
SOFT RANGE CHECK: 0-300,000



BOX\_IN18  
=====

-----  
| IF AMOUNT OTHER THAN ZERO ENTERED AT IN18 AND IN04 |  
| IS CODED '2' (MARRIED FILING JOINT RETURN), |  
CONTINUE WITH IN18OV

-----  
OTHERWISE, GO TO IN19

IN18OV  
=====

What percentage of this amount was received by (PRIMARY FILER)?

[Enter Percent] ..... {IN19}  
REF ..... -7 {IN19}  
DK ..... -8 {IN19}

-----  
RANGE CHECK: 0-100

IN18A  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}            {NAME OF SECONDARY FILER}

SHOW CARD IN-1.

Looking at this card, which range best estimates how much money was received [from wages or salary, tips, commissions, or bonuses in 2001]?

1 - 2,500 .....	1
2,501 - 5,000 .....	2
5,001 - 10,000 .....	3
10,001 - 20,000 .....	4
20,001 - 30,000 .....	5
30,001 - 40,000 .....	6
40,001 - 50,000 .....	7
50,001 - 75,000 .....	8
75,001 - 100,000 .....	9
100,001 OR MORE .....	10
REF .....	-7
DK .....	-8

[Code One]

-----  
| FOR 'NAME OF SECONDARY FILER', DISPLAY THE |  
| PERSON'S NAME SELECTED AT IN05 DURING LOOP\_01 FOR |  
| THE PRIMARY FILER CURRENTLY BEING ASKED ABOUT. IF |  
| IN05 WAS NOT ASKED IN LOOP\_01 FOR THIS PERSON, USE |  
A NULL DISPLAY.

IN19  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}            {NAME OF SECONDARY FILER}

During 2001, how much did (READ NAME(S) ABOVE) receive in interest from savings accounts, bonds, NOW accounts, money market accounts, or similar types of investments?

IF TAX FORM IS AVAILABLE, HAVE RESPONDENT REFER TO  
FORM 1040, LINE 8a  
FORM 1040A, LINE 8a  
FORM 1040EZ, LINE 2

[Enter \$ Amount] .....  
REF ..... -7 {BOX\_02}  
DK ..... -8 {IN19A}

PRESS F1 FOR DESCRIPTION OF AMOUNTS TO INCLUDE.

-----  
| FOR 'NAME OF SECONDARY FILER', DISPLAY THE |  
| PERSON'S NAME SELECTED AT IN05 DURING LOOP\_01 FOR |  
| THE PRIMARY FILER CURRENTLY BEING ASKED ABOUT. IF |  
| IN05 WAS NOT ASKED IN LOOP\_01 FOR THIS PERSON, USE |  
A NULL DISPLAY.

-----  
SOFT RANGE CHECK: 0-100,000

BOX\_IN19  
=====

-----  
| IF AMOUNT OTHER THAN ZERO ENTERED AT IN19, |  
CONTINUE WITH IN19OV

-----  
OTHERWISE, GO TO BOX\_02

IN190V  
=====

What percentage of this interest amount was taxable?

IF TAX FORM IS AVAILABLE, HAVE RESPONDENT REFER TO  
FORM 1040, LINE 8b  
FORM 1040A, LINE 8b  
FORM 1040EZ, NO LINE REFERENCE

[Enter Percent] .....	{BOX_02}
REF .....	-7 {BOX_02}
DK .....	-8 {BOX_02}

-----  
RANGE CHECK: 0-100

IN19A  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}            {NAME OF SECONDARY FILER}

SHOW CARD IN-1.

Looking at this card, which range best estimates how much money was received [in interest from savings accounts, bonds, NOW accounts, money market accounts, or similar types of investments in 2001]?

- 1 - 2,500 ..... 1
- 2,501 - 5,000 ..... 2
- 5,001 - 10,000 ..... 3
- 10,001 - 20,000 ..... 4
- 20,001 - 30,000 ..... 5
- 30,001 - 40,000 ..... 6
- 40,001 - 50,000 ..... 7
- 50,001 - 75,000 ..... 8
- 75,001 - 100,000 ..... 9
- 100,001 OR MORE ..... 10
- REF ..... -7
- DK ..... -8

[Code One]

-----  
| FOR 'NAME OF SECONDARY FILER', DISPLAY THE |  
| PERSON'S NAME SELECTED AT IN05 DURING LOOP\_01 FOR |  
| THE PRIMARY FILER CURRENTLY BEING ASKED ABOUT. IF |  
| IN05 WAS NOT ASKED IN LOOP\_01 FOR THIS PERSON, USE |  
A NULL DISPLAY.

IN19B  
=====

OMITTED.

BOX\_02  
=====

-----  
| IF IN09 IS CODED '1' (LONG FORM), '2' (SHORT FORM |  
1040A), OR '91' (OTHER), CONTINUE WITH IN20

-----  
OTHERWISE, GO TO IN30

IN20  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}            {NAME OF SECONDARY FILER}

During 2001, how much money did (READ NAME(S) ABOVE) receive from  
dividends?

IF TAX FORM IS AVAILABLE, HAVE RESPONDENT REFER TO  
FORM 1040, LINE 9  
FORM 1040A, LINE 9

[Enter \$ Amount] ..... {BOX\_02A}  
REF ..... -7 {BOX\_02A}  
DK ..... -8

PRESS F1 FOR DEFINITION OF DIVIDENDS.

-----  
| FOR 'NAME OF SECONDARY FILER', DISPLAY THE |  
| PERSON'S NAME SELECTED AT IN05 DURING LOOP\_01 FOR |  
| THE PRIMARY FILER CURRENTLY BEING ASKED ABOUT. IF |  
| IN05 WAS NOT ASKED IN LOOP\_01 FOR THIS PERSON, USE |  
A NULL DISPLAY.

-----  
SOFT RANGE CHECK: 0-100,000

IN20A  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}            {NAME OF SECONDARY FILER}

SHOW CARD IN-1.

Looking at this card, which range best estimates how much money  
was received [from dividends in 2001]?

1 - 2,500 .....	1
2,501 - 5,000 .....	2
5,001 - 10,000 .....	3
10,001 - 20,000 .....	4
20,001 - 30,000 .....	5
30,001 - 40,000 .....	6
40,001 - 50,000 .....	7
50,001 - 75,000 .....	8
75,001 - 100,000 .....	9
100,001 OR MORE .....	10
REF .....	-7
DK .....	-8

[Code One]

-----  
| FOR 'NAME OF SECONDARY FILER', DISPLAY THE |  
| PERSON'S NAME SELECTED AT IN05 DURING LOOP\_01 FOR |  
| THE PRIMARY FILER CURRENTLY BEING ASKED ABOUT. IF |  
| IN05 WAS NOT ASKED IN LOOP\_01 FOR THIS PERSON, USE |  
A NULL DISPLAY.

BOX\_02A  
=====

-----  
| IF IN09 IS CODED '2' (SHORT FORM 1040A), GO TO |  
IN25

-----  
OTHERWISE, CONTINUE WITH IN21

IN21  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}            {NAME OF SECONDARY FILER}

During 2001, how much money did (READ NAME(S) ABOVE) receive from  
refunds of state or local income taxes?

IF TAX FORM IS AVAILABLE, HAVE RESPONDENT REFER TO  
FORM 1040, LINE 10

[Enter \$ Amount] ..... {IN22}  
REF ..... -7 {IN22}  
DK ..... -8

PRESS F1 FOR DEFINITION OF INCOME TAX REFUNDS.

-----  
| FOR 'NAME OF SECONDARY FILER', DISPLAY THE |  
| PERSON'S NAME SELECTED AT IN05 DURING LOOP\_01 FOR |  
| THE PRIMARY FILER CURRENTLY BEING ASKED ABOUT. IF |  
| IN05 WAS NOT ASKED IN LOOP\_01 FOR THIS PERSON, USE |  
A NULL DISPLAY.

-----  
SOFT RANGE CHECK: 0-100,000



IN21A  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}            {NAME OF SECONDARY FILER}

SHOW CARD IN-1.

Looking at this card, which range best estimates how much money  
was received [from refunds of state or local taxes in 2001]?

1 - 2,500 .....	1
2,501 - 5,000 .....	2
5,001 - 10,000 .....	3
10,001 - 20,000 .....	4
20,001 - 30,000 .....	5
30,001 - 40,000 .....	6
40,001 - 50,000 .....	7
50,001 - 75,000 .....	8
75,001 - 100,000 .....	9
100,001 OR MORE .....	10
REF .....	-7
DK .....	-8

[Code One]

-----  
| FOR 'NAME OF SECONDARY FILER', DISPLAY THE |  
| PERSON'S NAME SELECTED AT IN05 DURING LOOP\_01 FOR |  
| THE PRIMARY FILER CURRENTLY BEING ASKED ABOUT. IF |  
| IN05 WAS NOT ASKED IN LOOP\_01 FOR THIS PERSON, USE |  
A NULL DISPLAY.

IN22  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}            {NAME OF SECONDARY FILER}

During 2001, how much money did (READ NAME(S) ABOVE) receive from alimony?

IF TAX FORM IS AVAILABLE, HAVE RESPONDENT REFER TO FORM 1040, LINE 11

[Enter \$ Amount] .....	{IN23}
REF .....	-7 {IN23}
DK .....	-8

PRESS F1 FOR DEFINITION OF ALIMONY.

-----  
| FOR 'NAME OF SECONDARY FILER', DISPLAY THE |  
| PERSON'S NAME SELECTED AT IN05 DURING LOOP\_01 FOR |  
| THE PRIMARY FILER CURRENTLY BEING ASKED ABOUT. IF |  
| IN05 WAS NOT ASKED IN LOOP\_01 FOR THIS PERSON, USE |  
A NULL DISPLAY.

-----  
SOFT RANGE CHECK: 0-100,000

IN22A  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}            {NAME OF SECONDARY FILER}

SHOW CARD IN-1.

Looking at this card, which range best estimates how much money  
was received [from alimony in 2001]?

1 - 2,500 .....	1
2,501 - 5,000 .....	2
5,001 - 10,000 .....	3
10,001 - 20,000 .....	4
20,001 - 30,000 .....	5
30,001 - 40,000 .....	6
40,001 - 50,000 .....	7
50,001 - 75,000 .....	8
75,001 - 100,000 .....	9
100,001 OR MORE .....	10
REF .....	-7
DK .....	-8

[Code One]

-----  
| FOR 'NAME OF SECONDARY FILER', DISPLAY THE |  
| PERSON'S NAME SELECTED AT IN05 DURING LOOP\_01 FOR |  
| THE PRIMARY FILER CURRENTLY BEING ASKED ABOUT. IF |  
| IN05 WAS NOT ASKED IN LOOP\_01 FOR THIS PERSON, USE |  
A NULL DISPLAY.

IN23  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}            {NAME OF SECONDARY FILER}

During 2001, how much money did (READ NAME(S) ABOVE) earn or lose  
from (his/her/their) own **non-farm** business or practice?

IF TAX FORM IS AVAILABLE, HAVE RESPONDENT REFER TO  
FORM 1040, LINE 12

[Enter \$ Amount] .....  
REF ..... -7 {IN24}  
DK ..... -8 {IN23A}

PRESS F1 FOR DESCRIPTION OF AMOUNTS TO INCLUDE.

-----  
| FOR 'NAME OF SECONDARY FILER', DISPLAY THE |  
| PERSON'S NAME SELECTED AT IN05 DURING LOOP\_01 FOR |  
| THE PRIMARY FILER CURRENTLY BEING ASKED ABOUT. IF |  
| IN05 WAS NOT ASKED IN LOOP\_01 FOR THIS PERSON, USE |  
A NULL DISPLAY.

-----  
SOFT RANGE CHECK: 0-300,000

BOX\_IN23  
=====

-----  
| IF AMOUNT OTHER THAN ZERO ENTERED AT IN23, |  
CONTINUE WITH IN23OV1

-----  
OTHERWISE, GO TO IN24

IN23OV1  
=====

INTERVIEWER: WAS THE AMOUNT ENTERED EARNINGS OR LOSS?

EARNINGS ..... 1  
LOSS ..... 2

[Code One]

BOX\_IN23OV1  
=====

-----  
| IF IN04 IS CODED '2' (MARRIED FILING JOINT |  
RETURN), CONTINUE WITH IN23OV2

-----  
OTHERWISE, GO TO IN24

IN23OV2  
=====

What percentage of this amount was {received/lost} by  
(PRIMARY FILER)?

[Enter Percent] ..... {IN24}  
REF ..... -7 {IN24}  
DK ..... -8 {IN24}

-----  
| IF IN23OV1 IS CODED '1' (EARNINGS), DISPLAY |  
| 'received'. IF IN23OV1 IS CODED '2' (LOSS), |  
DISPLAY 'lost'.

-----  
RANGE CHECK: 0-100

IN23A  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}            {NAME OF SECONDARY FILER}

SHOW CARD IN-1.

Looking at this card, which range best estimates how much money was earned or lost [from (his/her/their) own **non-farm** business or practice in 2001]?

- 1 - 2,500 ..... 1
- 2,501 - 5,000 ..... 2
- 5,001 - 10,000 ..... 3
- 10,001 - 20,000 ..... 4
- 20,001 - 30,000 ..... 5
- 30,001 - 40,000 ..... 6
- 40,001 - 50,000 ..... 7
- 50,001 - 75,000 ..... 8
- 75,001 - 100,000 ..... 9
- 100,001 OR MORE ..... 10
- REF ..... -7 {IN24}
- DK ..... -8 {IN24}

[Code One]

-----  
| FOR 'NAME OF SECONDARY FILER', DISPLAY THE  
| PERSON'S NAME SELECTED AT IN05 DURING LOOP\_01 FOR  
| THE PRIMARY FILER CURRENTLY BEING ASKED ABOUT. IF  
| IN05 WAS NOT ASKED IN LOOP\_01 FOR THIS PERSON, USE  
A NULL DISPLAY.

IN23AOV  
=====

INTERVIEWER: DOES THE RANGE SELECTED REPRESENT  
EARNINGS OR LOSS?

- EARNINGS ..... 1
- LOSS ..... 2

[Code One]

IN24  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}            {NAME OF SECONDARY FILER}

During 2001, how much money was (READ NAME(S) ABOVE)'s net gain or net loss from the sale of property or other assets, **including** the sale of (his/her/their) home, if it was taxable?

IF TAX FORM IS AVAILABLE, HAVE RESPONDENT REFER TO FORM 1040, LINES 13 & 14

[Enter \$ Amount] .....  
REF ..... -7 {IN25}  
DK ..... -8 {IN24A}

PRESS F1 FOR DESCRIPTION OF AMOUNTS TO INCLUDE.

-----  
| FOR 'NAME OF SECONDARY FILER', DISPLAY THE |  
| PERSON'S NAME SELECTED AT IN05 DURING LOOP\_01 FOR |  
| THE PRIMARY FILER CURRENTLY BEING ASKED ABOUT. IF |  
| IN05 WAS NOT ASKED IN LOOP\_01 FOR THIS PERSON, USE |  
A NULL DISPLAY.

-----  
SOFT RANGE CHECK: 0-300,000

BOX\_IN24  
=====

-----  
| IF AMOUNT OTHER THAN ZERO ENTERED AT IN24, |  
CONTINUE WITH IN24OV

-----  
OTHERWISE, GO TO IN25

IN240V  
=====

INTERVIEWER: WAS THE AMOUNT ENTERED A NET GAIN OR A  
NET LOSS?

NET GAIN ..... 1 {IN25}  
NET LOSS ..... 2 {IN25}

[Code One]

IN24A  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}      {NAME OF SECONDARY FILER}

SHOW CARD IN-1.

Looking at this card, which range best estimates how much money  
was earned or lost [from the sale of property or other assets,  
including the sale of (his/her/their) home, if it was taxable,  
in 2001]?

1 - 2,500 ..... 1  
2,501 - 5,000 ..... 2  
5,001 - 10,000 ..... 3  
10,001 - 20,000 ..... 4  
20,001 - 30,000 ..... 5  
30,001 - 40,000 ..... 6  
40,001 - 50,000 ..... 7  
50,001 - 75,000 ..... 8  
75,001 - 100,000 ..... 9  
100,001 OR MORE ..... 10  
REF ..... -7 {IN25}  
DK ..... -8 {IN25}

[Code One]

-----  
| FOR 'NAME OF SECONDARY FILER', DISPLAY THE |  
| PERSON'S NAME SELECTED AT IN05 DURING LOOP\_01 FOR |  
| THE PRIMARY FILER CURRENTLY BEING ASKED ABOUT. IF |  
| IN05 WAS NOT ASKED IN LOOP\_01 FOR THIS PERSON, USE |  
A NULL DISPLAY.



IN24AOV  
=====

INTERVIEWER: DOES THE RANGE SELECTED REPRESENT  
NET GAIN OR NET LOSS?

NET GAIN ..... 1  
NET LOSS ..... 2

[Code One]

IN25  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}      {NAME OF SECONDARY FILER}

During 2001, how much money did (READ NAME(S) ABOVE) receive from  
payments from Individual Retirement Accounts (IRAs)?

IF TAX FORM IS AVAILABLE, HAVE RESPONDENT REFER TO  
FORM 1040, LINE 15a  
FORM 1040A, LINE 11a

[Enter \$ Amount] .....  
REF ..... -7 {IN26}  
DK ..... -8 {IN25A}

PRESS F1 FOR DEFINITION OF IRA.

-----  
| FOR 'NAME OF SECONDARY FILER', DISPLAY THE |  
| PERSON'S NAME SELECTED AT IN05 DURING LOOP\_01 FOR |  
| THE PRIMARY FILER CURRENTLY BEING ASKED ABOUT. IF |  
| IN05 WAS NOT ASKED IN LOOP\_01 FOR THIS PERSON, USE |  
A NULL DISPLAY.

-----  
SOFT RANGE CHECK: 0-100,000

BOX\_IN25  
=====

-----  
| IF AMOUNT OTHER THAN ZERO ENTERED AT IN25, |  
CONTINUE WITH IN25OV
  
-----  
OTHERWISE, GO TO IN26

IN25OV  
=====

What percentage of this IRA amount was taxable?

IF TAX FORM IS AVAILABLE, HAVE RESPONDENT REFER TO  
FORM 1040, LINE 15b  
FORM 1040A, LINE 11b

[Enter Percent] ..... {IN26}  
REF ..... -7 {IN26}  
DK ..... -8 {IN26}

-----  
RANGE CHECK: 0-100

IN25A  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}            {NAME OF SECONDARY FILER}

SHOW CARD IN-1.

Looking at this card, which range best estimates how much money  
was received [from payments from IRAs in 2001]?

1 - 2,500 .....	1
2,501 - 5,000 .....	2
5,001 - 10,000 .....	3
10,001 - 20,000 .....	4
20,001 - 30,000 .....	5
30,001 - 40,000 .....	6
40,001 - 50,000 .....	7
50,001 - 75,000 .....	8
75,001 - 100,000 .....	9
100,001 OR MORE .....	10
REF .....	-7
DK .....	-8

[Code One]

-----  
| FOR 'NAME OF SECONDARY FILER', DISPLAY THE |  
| PERSON'S NAME SELECTED AT IN05 DURING LOOP\_01 FOR |  
| THE PRIMARY FILER CURRENTLY BEING ASKED ABOUT. IF |  
| IN05 WAS NOT ASKED IN LOOP\_01 FOR THIS PERSON, USE |  
A NULL DISPLAY.

IN26  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}            {NAME OF SECONDARY FILER}

During 2001, how much money did (READ NAME(S) ABOVE) receive from private pensions, military retirement, other Federal government employee pensions, state or local government employee pensions, or annuities?

IF TAX FORM IS AVAILABLE, HAVE RESPONDENT REFER TO  
FORM 1040, LINE 16a  
FORM 1040A, LINE 12a

[Enter \$ Amount] ..... {BOX\_02B}  
REF ..... -7 {BOX\_02B}  
DK ..... -8

PRESS F1 FOR DESCRIPTION OF AMOUNTS TO INCLUDE.

-----  
| FOR 'NAME OF SECONDARY FILER', DISPLAY THE |  
| PERSON'S NAME SELECTED AT IN05 DURING LOOP\_01 FOR |  
| THE PRIMARY FILER CURRENTLY BEING ASKED ABOUT. IF |  
| IN05 WAS NOT ASKED IN LOOP\_01 FOR THIS PERSON, USE |  
A NULL DISPLAY.

-----  
SOFT RANGE CHECK: 0-300,000

IN27  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}            {NAME OF SECONDARY FILER}

SHOW CARD IN-1.

Looking at this card, which range best estimates how much money was received [from private pensions, military retirement, other Federal government employee pensions, state or local government employee pensions, or annuities in 2001]?

1 - 2,500 .....	1
2,501 - 5,000 .....	2
5,001 - 10,000 .....	3
10,001 - 20,000 .....	4
20,001 - 30,000 .....	5
30,001 - 40,000 .....	6
40,001 - 50,000 .....	7
50,001 - 75,000 .....	8
75,001 - 100,000 .....	9
100,001 OR MORE .....	10
REF .....	-7
DK .....	-8

[Code One]

-----  
| FOR 'NAME OF SECONDARY FILER', DISPLAY THE |  
| PERSON'S NAME SELECTED AT IN05 DURING LOOP\_01 FOR |  
| THE PRIMARY FILER CURRENTLY BEING ASKED ABOUT. IF |  
| IN05 WAS NOT ASKED IN LOOP\_01 FOR THIS PERSON, USE |  
A NULL DISPLAY.

BOX\_02B  
=====

-----  
| IF IN09 IS CODED '2' (SHORT FORM 1040A), GO TO |  
IN30

-----  
OTHERWISE, CONTINUE WITH IN28

IN28  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}            {NAME OF SECONDARY FILER}

During 2001, how much money did (READ NAME(S) ABOVE) receive as a net gain or loss from estates or trusts, partnerships, S corporations, royalties, or from rental income?

IF TAX FORM IS AVAILABLE, HAVE RESPONDENT REFER TO FORM 1040, LINE 17

[Enter \$ Amount] .....  
REF ..... -7 {IN29}  
DK ..... -8 {IN28A}

PRESS F1 FOR DESCRIPTION OF AMOUNTS TO INCLUDE.

-----  
| FOR 'NAME OF SECONDARY FILER', DISPLAY THE |  
| PERSON'S NAME SELECTED AT IN05 DURING LOOP\_01 FOR |  
| THE PRIMARY FILER CURRENTLY BEING ASKED ABOUT. IF |  
| IN05 WAS NOT ASKED IN LOOP\_01 FOR THIS PERSON, USE |  
A NULL DISPLAY.

-----  
SOFT RANGE CHECK: 0-300,000

BOX\_IN28  
=====

-----  
| IF AMOUNT OTHER THAN ZERO ENTERED AT IN28, |  
CONTINUE WITH IN28OV

-----  
OTHERWISE, GO TO IN29

IN280V  
=====

INTERVIEWER: WAS THE AMOUNT ENTERED A NET GAIN OR A  
NET LOSS?

NET GAIN ..... 1 {IN29}  
NET LOSS ..... 2 {IN29}

[Code One]

IN28A  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}      {NAME OF SECONDARY FILER}

SHOW CARD IN-1.

Looking at this card, which range best estimates how much money  
was earned or lost [from estates or trusts, partnerships,  
S corporations, royalties, or from rental income in 2001]?

1 - 2,500 ..... 1  
2,501 - 5,000 ..... 2  
5,001 - 10,000 ..... 3  
10,001 - 20,000 ..... 4  
20,001 - 30,000 ..... 5  
30,001 - 40,000 ..... 6  
40,001 - 50,000 ..... 7  
50,001 - 75,000 ..... 8  
75,001 - 100,000 ..... 9  
100,001 OR MORE ..... 10  
REF ..... -7 {IN29}  
DK ..... -8 {IN29}

[Code One]

-----  
| FOR 'NAME OF SECONDARY FILER', DISPLAY THE |  
| PERSON'S NAME SELECTED AT IN05 DURING LOOP\_01 FOR |  
| THE PRIMARY FILER CURRENTLY BEING ASKED ABOUT. IF |  
| IN05 WAS NOT ASKED IN LOOP\_01 FOR THIS PERSON, USE |  
A NULL DISPLAY.

IN28AOV1  
=====

INTERVIEWER: DOES THE RANGE SELECTED REPRESENT  
NET GAIN OR NET LOSS?

NET GAIN ..... 1  
NET LOSS ..... 2

[Code One]

IN29  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}      {NAME OF SECONDARY FILER}

During 2001, how much money did (READ NAME(S) ABOVE) earn or lose  
from (his/her/their) own farm?

IF TAX FORM IS AVAILABLE, HAVE RESPONDENT REFER TO  
FORM 1040, LINE 18

[Enter \$ Amount] .....  
REF ..... -7 {IN30}  
DK ..... -8 {IN29A}

PRESS F1 FOR DESCRIPTION OF AMOUNTS TO INCLUDE.

-----  
| FOR 'NAME OF SECONDARY FILER', DISPLAY THE |  
| PERSON'S NAME SELECTED AT IN05 DURING LOOP\_01 FOR |  
| THE PRIMARY FILER CURRENTLY BEING ASKED ABOUT. IF |  
| IN05 WAS NOT ASKED IN LOOP\_01 FOR THIS PERSON, USE |  
A NULL DISPLAY.

-----  
SOFT RANGE CHECK: 0-100,000



BOX\_IN29  
=====

-----  
| IF AMOUNT OTHER THAN ZERO ENTERED AT IN29, |  
CONTINUE WITH IN29OV1

-----  
OTHERWISE, GO TO IN30

IN29OV1  
=====

INTERVIEWER: WAS THE AMOUNT ENTERED A NET GAIN OR A  
NET LOSS?

NET GAIN ..... 1  
NET LOSS ..... 2

[Code One]

BOX\_IN29OV1  
=====

-----  
| IF IN04 CODED '2' (MARRIED FILING JOINT RETURN), |  
CONTINUE WITH IN29OV2

-----  
OTHERWISE, GO TO IN30

IN29OV2  
=====

What percentage of this amount was {received/lost} by  
(PRIMARY FILER)?

[Enter Percent] .....	{IN30}
REF .....	-7 {IN30}
DK .....	-8 {IN30}

-----  
| IF IN29OV1 IS CODED '1' (NET GAIN), DISPLAY |  
| 'received'. IF IN29OV1 IS CODED '2' (NET LOSS), |  
DISPLAY 'lost'.

-----  
RANGE CHECK: 0-100

IN29A  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}            {NAME OF SECONDARY FILER}

SHOW CARD IN-1.

Looking at this card, which range best estimates how much money  
was earned or lost [from (his/her/their) own farm in 2001]?

1 - 2,500 .....	1
2,501 - 5,000 .....	2
5,001 - 10,000 .....	3
10,001 - 20,000 .....	4
20,001 - 30,000 .....	5
30,001 - 40,000 .....	6
40,001 - 50,000 .....	7
50,001 - 75,000 .....	8
75,001 - 100,000 .....	9
100,001 OR MORE .....	10
REF .....	-7 {IN30}
DK .....	-8 {IN30}

[Code One]

-----  
| FOR 'NAME OF SECONDARY FILER', DISPLAY THE |  
| PERSON'S NAME SELECTED AT IN05 DURING LOOP\_01 FOR |  
| THE PRIMARY FILER CURRENTLY BEING ASKED ABOUT. IF |  
| IN05 WAS NOT ASKED IN LOOP\_01 FOR THIS PERSON, USE |  
A NULL DISPLAY.

IN29AOV  
=====

INTERVIEWER: DOES THE RANGE SELECTED REPRESENT  
NET GAIN OR NET LOSS?

NET GAIN .....	1
NET LOSS .....	2

[Code One]

IN30  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}            {NAME OF SECONDARY FILER}

During 2001, how much money did (READ NAME(S) ABOVE) receive from  
unemployment compensation?

IF TAX FORM IS AVAILABLE, HAVE RESPONDENT REFER TO  
FORM 1040, LINE 19  
FORM 1040A, LINE 13  
FORM 1040EZ, LINE 3

[Enter \$ Amount] .....  
REF ..... -7 {BOX\_03}  
DK ..... -8 {IN30A}

PRESS F1 FOR DEFINITION OF UNEMPLOYMENT COMPENSATION.

-----  
| FOR 'NAME OF SECONDARY FILER', DISPLAY THE |  
| PERSON'S NAME SELECTED AT IN05 DURING LOOP\_01 FOR |  
| THE PRIMARY FILER CURRENTLY BEING ASKED ABOUT. IF |  
| IN05 WAS NOT ASKED IN LOOP\_01 FOR THIS PERSON, USE |  
A NULL DISPLAY.

-----  
SOFT RANGE CHECK: 0-100,000

BOX\_IN30  
=====

-----  
| IF AMOUNT OTHER THAN ZERO ENTERED AT IN30, |  
CONTINUE WITH IN30OV

-----  
OTHERWISE, GO TO BOX\_03

IN300V  
=====

What percentage of this amount was taxable?

[Enter Percent] ..... {BOX\_03}  
REF ..... -7 {BOX\_03}  
DK ..... -8 {BOX\_03}

-----  
RANGE CHECK: 0-100

IN30A  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}      {NAME OF SECONDARY FILER}

SHOW CARD IN-1.

Looking at this card, which range best estimates how much money  
was received [from unemployment compensation in 2001]?

1 - 2,500 ..... 1  
2,501 - 5,000 ..... 2  
5,001 - 10,000 ..... 3  
10,001 - 20,000 ..... 4  
20,001 - 30,000 ..... 5  
30,001 - 40,000 ..... 6  
40,001 - 50,000 ..... 7  
50,001 - 75,000 ..... 8  
75,001 - 100,000 ..... 9  
100,001 OR MORE ..... 10  
REF ..... -7  
DK ..... -8

[Code One]

-----  
| FOR 'NAME OF SECONDARY FILER', DISPLAY THE |  
| PERSON'S NAME SELECTED AT IN05 DURING LOOP\_01 FOR |  
| THE PRIMARY FILER CURRENTLY BEING ASKED ABOUT. IF |  
| IN05 WAS NOT ASKED IN LOOP\_01 FOR THIS PERSON, USE |  
A NULL DISPLAY.

BOX\_03  
=====

-----  
| IF IN09 IS CODED '1' (LONG FORM), '2' (SHORT FORM |  
1040A), OR '91' (OTHER), CONTINUE WITH IN31

-----  
OTHERWISE, GO TO IN33

IN31  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}            {NAME OF SECONDARY FILER}

During 2001, how much money did (READ NAME(S) ABOVE) receive from  
Social Security and equivalent tier 1 Railroad Retirement benefits?

IF TAX FORM IS AVAILABLE, HAVE RESPONDENT REFER TO  
FORM 1040, LINE 20a  
FORM 1040A, LINE 14a

[Enter \$ Amount] .....  
REF ..... -7 {IN33}  
DK ..... -8 {IN32}

PRESS F1 FOR DEFINITION OF SOCIAL SECURITY.

-----  
| FOR 'NAME OF SECONDARY FILER', DISPLAY THE |  
| PERSON'S NAME SELECTED AT IN05 DURING LOOP\_01 FOR |  
| THE PRIMARY FILER CURRENTLY BEING ASKED ABOUT. IF |  
| IN05 WAS NOT ASKED IN LOOP\_01 FOR THIS PERSON, USE |  
A NULL DISPLAY.

-----  
SOFT RANGE CHECK: 0-100,000

BOX\_IN31  
=====

-----  
| IF AMOUNT OTHER THAN ZERO ENTERED AT IN31, |  
CONTINUE WITH IN31OV

-----  
OTHERWISE, GO TO IN33

IN31OV  
=====

What percentage of this amount was taxable?

IF TAX FORM IS AVAILABLE, HAVE RESPONDENT REFER TO  
FORM 1040, LINE 20b  
FORM 1040A, LINE 14b

[Enter Percent] ..... {IN33}  
REF ..... -7 {IN33}  
DK ..... -8 {IN33}

-----  
RANGE CHECK: 0-100

IN32  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}            {NAME OF SECONDARY FILER}

SHOW CARD IN-1.

Looking at this card, which range best estimates how much money  
was received [from Social Security and equivalent tier 1  
Railroad Retirement benefits in 2001]?

1 - 2,500 .....	1
2,501 - 5,000 .....	2
5,001 - 10,000 .....	3
10,001 - 20,000 .....	4
20,001 - 30,000 .....	5
30,001 - 40,000 .....	6
40,001 - 50,000 .....	7
50,001 - 75,000 .....	8
75,001 - 100,000 .....	9
100,001 OR MORE .....	10
REF .....	-7
DK .....	-8

[Code One]

-----  
| FOR 'NAME OF SECONDARY FILER', DISPLAY THE |  
| PERSON'S NAME SELECTED AT IN05 DURING LOOP\_01 FOR |  
| THE PRIMARY FILER CURRENTLY BEING ASKED ABOUT. IF |  
| IN05 WAS NOT ASKED IN LOOP\_01 FOR THIS PERSON, USE |  
A NULL DISPLAY.



IN33  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}            {NAME OF SECONDARY FILER}

INTERVIEWER: WHAT RECORDS WERE USED IN COMPLETING THE TAXABLE  
INCOME QUESTIONS FOR THE PERSON(S) LISTED ABOVE?

CODE ALL THAT APPLY.

RESPONDENT'S/FAMILY MEMBER'S MEMORY .....	1
W-2 FORMS .....	2
COMPLETED TAX RETURN FORM .....	3
BANK STATEMENTS .....	4
RESPONDENT'S/FAMILY MEMBER'S CHECK BOOK ...	5
YEAR END FINANCIAL STATEMENTS .....	6
PAY STUBS .....	7
OTHER .....	91

[Code All That Apply]

BOX\_IN33  
=====

-----  
| IF IN33 IS CODED '91' (OTHER) ALONE OR IN |  
COMBINATION WITH OTHER CODES, CONTINUE WITH IN33OV

-----  
OTHERWISE, GO TO END\_LP02

IN33OV  
=====

ENTER OTHER:

[Other Specify] .....	
REF .....	-7
DK .....	-8

END\_LP02  
=====

-----  
| CYCLE ON NEXT PERSON ON THE RU-MEMBERS-ROSTER |  
| THAT MEETS THE CONDITIONS STATED IN THE LOOP |  
DEFINITION.

-----  
| IF NO OTHER PERSONS MEET THE STATED CONDITIONS, |  
END LOOP\_02 AND CONTINUE WITH IN34

IN34  
=====

During 2001, did anyone in the family receive Worker's  
Compensation?

YES .....	1
NO .....	2 {IN37}
REF .....	-7 {IN37}
DK .....	-8 {IN37}

PRESS F1 FOR DEFINITION OF WORKER'S COMPENSATION.

-----  
| IF CODED '1' (YES) AND A SINGLE PERSON RU, |  
| AUTOMATICALLY CODE PERSON AS 'RECEIVED WORKER'S |  
COMPENSATION' AT IN35 AND GO TO LOOP\_03

IN35  
=====

Who received Worker's Compensation in 2001?

PROBE: Anyone else receive Worker's Compensation in 2001?

TO TURN CHECK MARK ON/OFF, USE ARROW KEYS, PRESS ENTER.  
TO LEAVE, PRESS ESC.

- [1. First Name, [Middle Name], Last name-65]
- [2. First Name, [Middle Name], Last name-65]
- [3. First Name, [Middle Name], Last name-65]

[Code All That Apply]

-----  
ROSTER DEFINITION: THIS ITEM USES THE  
RU-MEMBERS-ROSTER TO DISPLAY ALL PERSONS WHO MEET  
THE FOLLOWING CONDITION:

- PERSON IS A CURRENT ROUND RU MEMBER (INCLUDES  
DECEASED AND INSTITUTIONALIZED RU MEMBERS)

LOOP\_03  
=====

-----  
FOR EACH ELEMENT IN THE RU-MEMBERS-ROSTER,  
ASK IN36 - END\_LP03

-----  
LOOP DEFINITION: LOOP\_03 DETERMINES HOW MUCH  
MONEY WAS RECEIVED FROM WORKER'S COMPENSATION FOR  
RU MEMBERS WHO RECEIVED WORKER'S COMPENSATION IN  
2001. THIS LOOP CYCLES ON EACH PERSON ON THE  
RU-MEMBERS-ROSTER WHO MEETS THE FOLLOWING  
CONDITIONS:

- PERSON IS A CURRENT ROUND RU MEMBER (INCLUDES  
DECEASED AND INSTITUTIONALIZED RU MEMBERS)
- PERSON RECEIVED WORKER'S COMPENSATION IN 2001  
(SELECTED AT IN35)

IN36  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

How much money did (PERSON) receive from Worker's Compensation  
[in 2001]?

[Enter \$ Amount] ..... {END\_LP03}  
REF ..... -7 {END\_LP03}  
DK ..... -8

-----  
SOFT RANGE CHECK: 0-50,000

IN36A  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

SHOW CARD IN-1.

Looking at this card, which range best estimates how much money  
was received [from Worker's Compensation in 2001]?

1 - 2,500 ..... 1  
2,501 - 5,000 ..... 2  
5,001 - 10,000 ..... 3  
10,001 - 20,000 ..... 4  
20,001 - 30,000 ..... 5  
30,001 - 40,000 ..... 6  
40,001 - 50,000 ..... 7  
50,001 - 75,000 ..... 8  
75,001 - 100,000 ..... 9  
100,001 OR MORE ..... 10  
REF ..... -7  
DK ..... -8

[Code One]

END\_LP03  
=====

-----  
| CYCLE ON NEXT PERSON ON THE RU-MEMBERS-ROSTER |  
| THAT MEETS THE CONDITIONS STATED IN THE LOOP |  
DEFINITION.

-----  
| IF NO OTHER PERSONS MEET THE STATED CONDITIONS, |  
END LOOP\_03 AND CONTINUE WITH IN37

IN37  
=====

During 2001, did anyone in the family receive Supplemental  
Security Income, also known as S.S.I.?

YES .....	1
NO .....	2 {IN41}
REF .....	-7 {IN41}
DK .....	-8 {IN41}

PRESS F1 FOR DEFINITION OF S.S.I.

-----  
| IF CODED '1' (YES) AND A SINGLE PERSON RU, |  
| AUTOMATICALLY CODE PERSON AS 'RECEIVED S.S.I.' AT |  
IN38 AND GO TO LOOP\_04

IN38  
=====

Who received Supplemental Security Income in 2001?

PROBE: Anyone else receive S.S.I. in 2001?

TO TURN CHECK MARK ON/OFF, USE ARROW KEYS, PRESS ENTER.  
TO LEAVE, PRESS ESC.

- [1. First Name, [Middle Name], Last name-65]
- [2. First Name, [Middle Name], Last name-65]
- [3. First Name, [Middle Name], Last name-65]

[Code All That Apply]

-----  
ROSTER DEFINITION: THIS ITEM USES THE  
RU-MEMBERS-ROSTER TO DISPLAY ALL PERSONS WHO MEET  
THE FOLLOWING CONDITION:

- PERSON IS A CURRENT ROUND RU MEMBER (INCLUDES  
DECEASED AND INSTITUTIONALIZED RU MEMBERS)

LOOP\_04  
=====

-----  
FOR EACH ELEMENT IN THE RU-MEMBERS-ROSTER,  
ASK BOX\_03A - END\_LP04

-----  
LOOP DEFINITION: LOOP\_04 DETERMINES HOW MUCH  
MONEY WAS RECEIVED FROM SUPPLEMENTAL SECURITY  
INCOME (S.S.I) FOR RU MEMBERS WHO RECEIVED S.S.I.  
IN 2001. THIS LOOP CYCLES ON EACH PERSON ON THE  
RU-MEMBERS-ROSTER WHO MEETS THE FOLLOWING  
CONDITIONS:

- PERSON IS A CURRENT ROUND RU MEMBER (INCLUDES  
DECEASED AND INSTITUTIONALIZED RU MEMBERS)
- PERSON RECEIVED SUPPLEMENTAL SECURITY INCOME IN  
2001 (SELECTED AT IN38)

BOX\_03A  
=====

-----  
| IF PERSON IS LESS THAN 65 YEARS OLD OR IN AGE |  
CATEGORIES 1-8, CONTINUE WITH IN39

-----  
OTHERWISE, GO TO IN40A

IN39  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

Did (PERSON) receive money from Supplemental Security Income  
because of (PERSON)'s **own** disability or for some other reason?

DISABILITY ..... 1  
SOME OTHER REASON ..... 2  
REF ..... -7  
DK ..... -8

[Code One]

IN40A  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

For how many months in 2001 did (PERSON) receive money from  
Supplemental Security Income?

[Enter Number of Months] .....  
REF ..... -7  
DK ..... -8

-----  
RANGE CHECK: 1-12

IN40B  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

On average, how much money did (PERSON) get per month [from  
Supplemental Security Income in 2001]?

[Enter \$ Amount] ..... {END\_LP04}  
REF ..... -7 {END\_LP04}  
DK ..... -8

-----  
SOFT RANGE CHECK:   0-50,000

IN40C  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

SHOW CARD IN-2.

Looking at this card, which range best estimates how much money  
was received per month [from Supplemental Security Income in  
2001]?

1 - 250 ..... 1  
251 - 500 ..... 2  
501 - 750 ..... 3  
751 - 1,000 ..... 4  
1,001 OR MORE ..... 5  
REF ..... -7  
DK ..... -8

[Code One]



END\_LP04  
=====

-----  
| CYCLE ON NEXT PERSON ON THE RU-MEMBERS-ROSTER |  
| THAT MEETS THE CONDITIONS STATED IN THE LOOP |  
DEFINITION.

-----  
| IF NO OTHER PERSONS MEET THE STATED CONDITIONS, |  
END LOOP\_04 AND CONTINUE WITH IN41

IN41  
=====

During 2001, did anyone in the family receive any money from  
public assistance (such as TANF or general assistance)?

YES .....	1
NO .....	2 {IN46}
REF .....	-7 {IN46}
DK .....	-8 {IN46}

PRESS F1 FOR DEFINITION OF PUBLIC ASSISTANCE.

-----  
| IF CODED '1' (YES) AND A SINGLE PERSON RU, |  
| AUTOMATICALLY CODE PERSON AS 'RECEIVED PUBLIC |  
ASSISTANCE' AT IN42 AND GO TO LOOP\_05

IN42

=====

Whose name was on the checks?

PROBE: Does anyone else receive a check from public assistance in their name?

TO TURN CHECK MARK ON/OFF, USE ARROW KEYS, PRESS ENTER.  
TO LEAVE, PRESS ESC.

- [1. First Name, [Middle Name], Last name-65]
- [2. First Name, [Middle Name], Last name-65]
- [3. First Name, [Middle Name], Last name-65]

[Code All That Apply]

-----  
ROSTER DEFINITION: THIS ITEM USES THE  
RU-MEMBERS-ROSTER TO DISPLAY ALL PERSONS WHO MEET  
THE FOLLOWING CONDITION:

- PERSON IS A CURRENT ROUND RU MEMBER (INCLUDES  
DECEASED AND INSTITUTIONALIZED RU MEMBERS)

LOOP\_05

=====

-----  
FOR EACH ELEMENT IN THE RU-MEMBERS-ROSTER,  
ASK IN43 - END\_LP05

-----  
LOOP DEFINITION: LOOP\_05 DETERMINES WHO WAS  
COVERED BY PUBLIC ASSISTANCE, WHETHER ANY OF THE  
CHECKS INCLUDED MONEY FROM AFDC OR ADC AND HOW  
MUCH WAS RECEIVED PER MONTH. THIS LOOP CYCLES ON  
EACH PERSON ON THE RU-MEMBERS-ROSTER WHO MEETS THE  
FOLLOWING CONDITIONS:

- PERSON IS A CURRENT ROUND RU MEMBER (INCLUDES  
DECEASED AND INSTITUTIONALIZED RU MEMBERS)
- PERSON'S NAME WAS ON THE PUBLIC ASSISTANCE  
CHECKS (SELECTED AT IN42)

IN43  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

Sometimes checks from public assistance cover more than one person in the family, even though only one person's name is on the check.

Who is covered by (PERSON)'s checks from public assistance?

PROBE: Did (PERSON)'s checks cover anyone else?

TO TURN CHECK MARK ON/OFF, USE ARROW KEYS, PRESS ENTER.  
TO LEAVE, PRESS ESC.

- [1. First Name, [Middle Name], Last name-65]
- [2. First Name, [Middle Name], Last name-65]
- [3. First Name, [Middle Name], Last name-65]

[Code All That Apply]

-----  
| ROSTER DEFINITION: THIS ITEM USES THE |  
| RU-MEMBERS-ROSTER TO DISPLAY ALL PERSONS WHO MEET |  
| THE FOLLOWING CONDITIONS: |  
| |  
| - PERSON IS A CURRENT ROUND RU MEMBER (INCLUDES |  
| DECEASED AND INSTITUTIONALIZED RU MEMBERS) |  
| - PERSON IS NOT SELECTED AS RECEIVING HIS OWN |  
| PUBLIC ASSISTANCE CHECKS, THAT IS PERSON WAS NOT |  
| SELECTED AT IN42 |  

-----  
| DISPLAY 'PERSON NOT IN RU' AS THE 2ND TO LAST |  
ENTRY ON THE ROSTER.

-----  
| DISPLAY 'CHECK ONLY COVERS (PERSON) IN HEADER' |  
AS THE LAST ENTRY ON THE ROSTER.

IN44  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

Did any of (PERSON)'s checks include money from Temporary Assistance for Needy Families, also known as TANF?

YES ..... 1  
NO ..... 2  
REF ..... -7  
DK ..... -8

PRESS F1 FOR DEFINITION OF TANF.

IN45A  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

For how many months in 2001 did (PERSON) receive checks from public assistance?

[Enter Number of Months] .....  
REF ..... -7  
DK ..... -8

-----  
RANGE CHECK: 1-12

IN45B  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

On average, how much money did (PERSON) get per month [from public assistance in 2001]?

[Enter \$ Amount] ..... {END\_LP05}  
REF ..... -7 {END\_LP05}  
DK ..... -8

-----  
SOFT RANGE CHECK: 0-50,000

IN45C  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

SHOW CARD IN-2.

Looking at this card, which range best estimates how much money  
was received per month [from public assistance in 2001]?

1 - 250 .....	1
251 - 500 .....	2
501 - 750 .....	3
751 - 1,000 .....	4
1,001 OR MORE .....	5
REF .....	-7
DK .....	-8

[Code One]

END\_LP05  
=====

-----  
| CYCLE ON NEXT PERSON ON THE RU-MEMBERS-ROSTER |  
| THAT MEETS THE CONDITIONS STATED IN THE LOOP |  
DEFINITION.

-----  
| IF NO OTHER PERSONS MEET THE STATED CONDITIONS, |  
END LOOP\_05 AND CONTINUE WITH IN46

IN46  
=====

During 2001, did anyone in the family receive any money from  
child support?

- YES ..... 1
- NO ..... 2 {IN49}
- REF ..... -7 {IN49}
- DK ..... -8 {IN49}

PRESS F1 FOR DEFINITION OF CHILD SUPPORT.

-----  
| IF CODED '1' (YES) AND A SINGLE PERSON RU, |  
| AUTOMATICALLY CODE PERSON AS 'RECEIVED CHILD |  
SUPPORT' AT IN47 AND GO TO LOOP\_06

IN47  
=====

Who received child support in 2001?

PROBE: Anyone else receive child support in 2001?

TO TURN CHECK MARK ON/OFF, USE ARROW KEYS, PRESS ENTER.  
TO LEAVE, PRESS ESC.

- [1. First Name, [Middle Name], Last name-65]
- [2. First Name, [Middle Name], Last name-65]
- [3. First Name, [Middle Name], Last name-65]

[Code All That Apply]

PRESS F1 FOR DESCRIPTION OF WHO TO INCLUDE.

-----  
| ROSTER DEFINITION: THIS ITEM USES THE |  
| RU-MEMBERS-ROSTER TO DISPLAY ALL PERSONS WHO MEET |  
| THE FOLLOWING CONDITION: |  
| - PERSON IS A CURRENT ROUND RU MEMBER (INCLUDES |  
DECEASED AND INSTITUTIONALIZED RU MEMBERS)

LOOP\_06  
=====

-----  
| FOR EACH ELEMENT IN THE RU-MEMBERS-ROSTER, |  
ASK IN48A - END\_LP06

-----  
| LOOP DEFINITION: LOOP\_06 DETERMINES HOW MUCH |  
| MONEY WAS RECEIVED FROM CHILD SUPPORT FOR RU |  
| MEMBERS WHO RECEIVED CHILD SUPPORT IN 2001. |  
| THIS LOOP CYCLES ON EACH PERSON ON THE RU-MEMBERS- |  
| ROSTER WHO MEETS THE FOLLOWING CONDITIONS: |  
| - PERSON IS A CURRENT ROUND RU MEMBER (INCLUDES |  
| DECEASED AND INSTITUTIONALIZED RU MEMBERS) |  
| - PERSON RECEIVED CHILD SUPPORT IN 2001 (SELECTED |  
AT IN47)

IN48A  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

For how many months in 2001 did (PERSON) receive money from  
child support?

[Enter Number of Months] .....  
REF ..... -7  
DK ..... -8

-----  
RANGE CHECK: 1-12

MEPS FAMES Panel 5 Round 5 Income (IN) Section  
September 18, 2001

IN48B  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

On average, how much money did (PERSON) get per month [from  
child support in 2001]?

[Enter \$ Amount] ..... {END\_LP06}  
REF ..... -7 {END\_LP06}  
DK ..... -8

-----  
SOFT RANGE CHECK: 0-100,000

IN48C  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

SHOW CARD IN-2.

Looking at this card, which range best estimates how much money  
was received per month [from child support in 2001]?

1 - 250 ..... 1  
251 - 500 ..... 2  
501 - 750 ..... 3  
751 - 1,000 ..... 4  
1,001 OR MORE ..... 5  
REF ..... -7  
DK ..... -8

[Code One]



END\_LP06  
=====

-----  
| CYCLE ON NEXT PERSON ON THE RU-MEMBERS-ROSTER |  
| THAT MEETS THE CONDITIONS STATED IN THE LOOP |  
DEFINITION.

-----  
| IF NO OTHER PERSONS MEET THE STATED CONDITIONS, |  
END LOOP\_06 AND CONTINUE WITH IN49

IN49  
=====

Not counting military retirement, during 2001, did anyone in the family receive any veteran's payments such as education or disability benefits?

YES .....	1
NO .....	2 {IN52}
REF .....	-7 {IN52}
DK .....	-8 {IN52}

PRESS F1 FOR DEFINITION OF VETERAN'S PAYMENTS.

-----  
| IF CODED '1' (YES) AND A SINGLE PERSON RU, |  
| AUTOMATICALLY CODE PERSON AS 'RECEIVED VETERAN'S |  
PAYMENTS' AT IN50 AND GO TO LOOP\_07

IN50  
=====

Who received veteran's payments such as education or  
disability benefits [in 2001]?

PROBE: Anyone else receive veteran's payments in 2001?

TO TURN CHECK MARK ON/OFF, USE ARROW KEYS, PRESS ENTER.  
TO LEAVE, PRESS ESC.

- [1. First Name, [Middle Name], Last name-65]
- [2. First Name, [Middle Name], Last name-65]
- [3. First Name, [Middle Name], Last name-65]

[Code All That Apply]

-----  
ROSTER DEFINITION: THIS ITEM USES THE  
RU-MEMBERS-ROSTER TO DISPLAY ALL PERSONS WHO MEET  
THE FOLLOWING CONDITION:

- PERSON IS A CURRENT ROUND RU MEMBER (INCLUDES  
DECEASED AND INSTITUTIONALIZED RU MEMBERS)

LOOP\_07  
=====

-----  
FOR EACH ELEMENT IN THE RU-MEMBERS-ROSTER,  
ASK IN51 - END\_LP07

-----  
LOOP DEFINITION: LOOP\_07 DETERMINES HOW MUCH  
MONEY WAS RECEIVED FROM VETERAN'S PAYMENTS FOR RU  
MEMBERS WHO RECEIVED VETERAN'S PAYMENTS IN 2001.  
THIS LOOP CYCLES ON EACH PERSON ON THE RU-MEMBERS-  
ROSTER WHO MEETS THE FOLLOWING CONDITIONS:

- PERSON IS A CURRENT ROUND RU MEMBER (INCLUDES  
DECEASED AND INSTITUTIONALIZED RU MEMBERS)
- PERSON RECEIVED VETERAN'S PAYMENTS IN 2001  
(SELECTED AT IN50)

IN51  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

How much money did (PERSON) receive from veterans payments such as education or disability benefits in 2001? [Do not include military retirement.]

[Enter \$ Amount] ..... {END\_LP07}  
REF ..... -7 {END\_LP07}  
DK ..... -8

-----  
SOFT RANGE CHECK: 0-100,000

IN51A  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

SHOW CARD IN-1.

Looking at this card, which range best estimates how much money was received [from veteran's payments such as education or disability benefits in 2001]?

1 - 2,500 ..... 1  
2,501 - 5,000 ..... 2  
5,001 - 10,000 ..... 3  
10,001 - 20,000 ..... 4  
20,001 - 30,000 ..... 5  
30,001 - 40,000 ..... 6  
40,001 - 50,000 ..... 7  
50,001 - 75,000 ..... 8  
75,001 - 100,000 ..... 9  
100,001 OR MORE ..... 10  
REF ..... -7  
DK ..... -8

[Code One]

END\_LP07  
=====

-----  
| CYCLE ON NEXT PERSON ON THE RU-MEMBERS-ROSTER |  
| THAT MEETS THE CONDITIONS STATED IN THE LOOP |  
DEFINITION.

-----  
| IF NO OTHER PERSONS MEET THE STATED CONDITIONS, |  
END LOOP\_07 AND CONTINUE WITH IN52

IN52  
=====

Besides what we have already talked about, during 2001, did any one in the family receive any money from regular cash contributions from people who do not live in this household?

- YES ..... 1
- NO ..... 2 {IN55}
- REF ..... -7 {IN55}
- DK ..... -8 {IN55}

PRESS F1 FOR DESCRIPTION OF REGULAR CASH CONTRIBUTIONS AND HOUSEHOLD.

-----  
| IF CODED '1' (YES) AND A SINGLE PERSON RU, |  
| AUTOMATICALLY CODE PERSON AS 'RECEIVED REGULAR |  
| CASH CONTRIBUTIONS FROM OUTSIDE HOUSEHOLD' AT |  
IN53 AND GO TO LOOP\_08

IN53  
=====

Who received regular cash contributions from people who do not live in this household [in 2001]?

PROBE: Anyone else receive regular cash contributions, in 2001, from people who do not live here?

TO TURN CHECK MARK ON/OFF, USE ARROW KEYS, PRESS ENTER.  
TO LEAVE, PRESS ESC.

- [1. First Name, [Middle Name], Last name-65]
- [2. First Name, [Middle Name], Last name-65]
- [3. First Name, [Middle Name], Last name-65]

[Code All That Apply]

-----  
| ROSTER DEFINITION: THIS ITEM USES THE |  
| RU-MEMBERS-ROSTER TO DISPLAY ALL PERSONS WHO MEET |  
| THE FOLLOWING CONDITION: |

- PERSON IS A CURRENT ROUND RU MEMBER (INCLUDES  
DECEASED AND INSTITUTIONALIZED RU MEMBERS)

LOOP\_08

=====

-----  
| FOR EACH ELEMENT IN THE RU-MEMBERS-ROSTER, |  
ASK IN54A - END\_LP08

-----  
| LOOP DEFINITION: LOOP\_08 DETERMINES HOW MUCH |  
| MONEY WAS RECEIVED FROM REGULAR CASH |  
| CONTRIBUTIONS FROM OUTSIDE THE HOUSEHOLD FOR RU |  
| MEMBERS WHO RECEIVED THESE TYPES OF CONTRIBUTIONS |  
| IN 2001. THIS LOOP CYCLES ON EACH PERSON ON THE |  
| RU-MEMBERS-ROSTER WHO MEETS THE FOLLOWING |  
| CONDITIONS: |

- PERSON IS A CURRENT ROUND RU MEMBER (INCLUDES  
DECEASED AND INSTITUTIONALIZED RU MEMBERS)
  - PERSON RECEIVED REGULAR CASH CONTRIBUTIONS  
FROM SOMEONE OUTSIDE OF THE HOUSEHOLD IN 2001  
(SELECTED AT IN53)
-

IN54A  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

For how many months in 2001 did (PERSON) receive money from  
regular cash contributions from people who do not live in this  
household?

[Enter Number of Months] .....  
REF ..... -7  
DK ..... -8

-----  
RANGE CHECK: 1-12

IN54B  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

On average, how much money did (PERSON) get per month [from  
regular cash contributions from people who do not live in this  
household, in 2001]?

[Enter \$ Amount] ..... {END\_LP08}  
REF ..... -7 {END\_LP08}  
DK ..... -8

-----  
SOFT RANGE CHECK: 0-100,000

IN54C  
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

SHOW CARD IN-2.

Looking at this card, which range best estimates how much money was received per month [from regular cash contributions from people who do not live in this household, in 2001]?

- 1 - 250 ..... 1
- 251 - 500 ..... 2
- 501 - 750 ..... 3
- 751 - 1,000 ..... 4
- 1,001 OR MORE ..... 5
- REF ..... -7
- DK ..... -8

[Code One]

END\_LP08  
=====

-----  
| CYCLE ON NEXT PERSON ON THE RU-MEMBERS-ROSTER |  
| THAT MEETS THE CONDITIONS STATED IN THE LOOP |  
DEFINITION.
  
-----  
| IF NO OTHER PERSONS MEET THE STATED CONDITIONS, |  
END LOOP\_08 AND CONTINUE WITH IN55

IN55  
=====

During 2001, did anyone in the family purchase or receive food stamps?

- YES ..... 1
- NO ..... 2 {IN59}
- REF ..... -7 {IN59}
- DK ..... -8 {IN59}

PRESS F1 FOR DEFINITION OF FOOD STAMPS.



IN56  
=====

For how many months in 2001 were these food stamps purchased or received?

[Enter Months] .....  
REF ..... -7  
DK ..... -8

-----  
RANGE CHECK: 1-12

IN57  
=====

About how much did **the family pay** each month for food stamps?

[Enter \$ Amount] .....  
REF ..... -7  
DK ..... -8

-----  
SOFT RANGE CHECK: 0-500

IN58  
=====

What was the approximate **monthly** value of the stamps?

[Enter \$ Amount] .....  
REF ..... -7  
DK ..... -8

-----  
SOFT RANGE CHECK: 0-1,000

IN59  
=====

SHOW CARD IN-3.

This card lists some sources of income. Has anyone in the family received any income, other than income we have already talked about, such as income from sources listed on this card?

YES	.....	1
NO	.....	2 {BOX_04}
REF	.....	-7 {BOX_04}
DK	.....	-8 {BOX_04}

PRESS F1 FOR DEFINITIONS OF SHOW CARD CATEGORIES.

LOOP\_09  
=====

-----  
FOR EACH OF THE FOLLOWING:  
  
OTHER INCOME SOURCE CATEGORY 1  
OTHER INCOME SOURCE CATEGORY 2  
OTHER INCOME SOURCE CATEGORY 3  
OTHER INCOME SOURCE CATEGORY 4  
OTHER INCOME SOURCE CATEGORY 5  
  
ASK IN60 - END\_LP09  
-----

-----  
LOOP DEFINITION: LOOP\_09 COLLECTS INFORMATION ABOUT OTHER SOURCES OF TAXABLE INCOME. THIS LOOP CYCLES ON SOURCES OF TAXABLE INCOME LISTED AT IN60. THE FIRST CYCLE OF THIS LOOP COLLECTS THE THE FIRST SOURCE OF TAXABLE INCOME. SUBSEQUENT CYCLES OF THE LOOP ARE DETERMINED BY THE RESPONSE AT IN63. IF IN63 IS CODED '1' (YES), THE LOOP CYCLES AGAIN TO COLLECT THE NEXT SOURCE OF TAXABLE INCOME. IF IN63 IS CODED '2' (NO), '-7' (REFUSED), OR '-8' (DON'T KNOW), THE LOOP ENDS.  
-----

IN60  
=====

SHOW CARD IN-3.

From which of the sources on this card did anyone in the family  
receive income [that we have not yet talked about]?

WAGES AND SALARY .....	1	{BOX_03B}
FARM INCOME (OR LOSS) .....	2	{BOX_03B}
BUSINESS INCOME (OR LOSS) .....	3	{BOX_03B}
SOCIAL SECURITY/RAILROAD RETIREMENT ...	4	{BOX_03B}
PRIVATE, MILITARY, OR GOVERNMENT PENSIONS .....	5	{BOX_03B}
INTEREST .....	6	{BOX_03B}
DIVIDENDS .....	7	{BOX_03B}
RENTAL INCOME (OR LOSS) .....	8	{BOX_03B}
OTHER SOURCE .....	91	
REF .....	-7	{BOX_03B}
DK .....	-8	{BOX_03B}

[Code One]

PRESS F1 FOR DEFINITIONS OF ANSWER CATEGORIES.

IN600V  
=====

ENTER OTHER:

[Other Specify] .....	
REF .....	-7
DK .....	-8

BOX\_03B  
=====

-----  
| IF SINGLE PERSON RU, AUTOMATICALLY CODE PERSON AS |  
| 'RECEIVED INCOME FROM IN60 SOURCE' AT IN61 AND GO |  
TO IN62 OTHERWISE CONTINUE WITH IN61

IN61  
=====

INCOME SOURCE: {DISPLAY CATEGORY SELECTED AT IN60.....}

Who received income from (INCOME SOURCE) in 2001?

PROBE: Anyone else receive income from (INCOME SOURCE) in 2001?

TO TURN CHECK MARK ON/OFF, USE ARROW KEYS, PRESS ENTER.  
TO LEAVE, PRESS ESC.

- [1. First Name, [Middle Name], Last name-65]
- [2. First Name, [Middle Name], Last name-65]
- [3. First Name, [Middle Name], Last name-65]

[Code All That Apply]

-----  
| ROSTER DEFINITION: THIS ITEM USES THE |  
| RU-MEMBERS-ROSTER TO DISPLAY ALL PERSONS WHO MEET |  
| THE FOLLOWING CONDITION: |

- PERSON IS A CURRENT ROUND RU MEMBER (INCLUDES  
DECEASED AND INSTITUTIONALIZED RU MEMBERS)

-----  
| FOR 'DISPLAY CATEGORY SELECTED AT IN60.....', |  
| DISPLAY THE RESPONSE CATEGORY NAME SELECTED AT |  
IN60 DURING THE CURRENT LOOP.

IN62  
=====

INCOME SOURCE: {DISPLAY CATEGORY SELECTED AT IN60.....}

What is the total amount received from (INCOME SOURCE), in 2001,  
for all of the people just mentioned?

[Enter \$ Amount] .....  
REF ..... -7 {IN63}  
DK ..... -8 {IN62A}

-----  
| FOR 'DISPLAY CATEGORY SELECTED AT IN60.....', |  
| DISPLAY THE RESPONSE CATEGORY NAME SELECTED AT |  
IN60 DURING THE CURRENT LOOP.

-----  
SOFT RANGE CHECK: 0-100,000

BOX\_IN62  
=====

-----  
| IF AMOUNT OTHER THAN ZERO ENTERED AT IN62 AND |  
| IN60 IS CODED '2' (FARM INCOME OR LOSS), '3' |  
| (BUSINESS INCOME OR LOSS), '8' (RENTAL INCOME OR |  
| LOSS), OR '91' (OTHER SOURCE), CONTINUE WITH |  
IN62OV

-----  
OTHERWISE, GO TO IN63

IN62OV  
=====

INTERVIEWER: WAS THE AMOUNT ENTERED A NET GAIN OR A  
NET LOSS?

NET GAIN ..... 1 {IN63}  
NET LOSS ..... 2 {IN63}

[Code One]

IN62A  
=====

INCOME SOURCE: {DISPLAY CATEGORY SELECTED AT IN60.....}

SHOW CARD IN-1.

Looking at this card, which range best estimates how much money  
was received [from (INCOME SOURCE) in 2001]?

- 1 - 2,500 ..... 1
- 2,501 - 5,000 ..... 2
- 5,001 - 10,000 ..... 3
- 10,001 - 20,000 ..... 4
- 20,001 - 30,000 ..... 5
- 30,001 - 40,000 ..... 6
- 40,001 - 50,000 ..... 7
- 50,001 - 75,000 ..... 8
- 75,001 - 100,000 ..... 9
- 100,001 OR MORE ..... 10
- REF ..... -7
- DK ..... -8

[Code One]

BOX\_IN62A  
=====

-----  
| IF '7' (REFUSED) OR '-8' (DON'T KNOW) IS NOT CODED |  
| AT IN62A AND IN60 IS CODED '2' (FARM INCOME OR |  
| LOSS), '3' (BUSINESS INCOME OR LOSS), '8' (RENTAL |  
| INCOME OR LOSS), OR '91' (OTHER SOURCE), CONTINUE |  
WITH IN62AOV

-----  
OTHERWISE, GO TO IN63

IN62AOV  
=====

INTERVIEWER: DOES THE RANGE SELECTED REPRESENT  
NET GAIN OR NET LOSS?

NET GAIN ..... 1  
NET LOSS ..... 2

[Code One]

IN63  
=====

SHOW CARD IN-3.

Aside from what you already told me about, has anyone in the  
family received any other income, such as income from **another**  
**source** listed on this card?

YES ..... 1  
NO ..... 2  
REF ..... -7  
DK ..... -8

PRESS F1 FOR DEFINITIONS OF SHOW CARD CATEGORIES.

END\_LP09  
=====

-----  
| IF IN63 IS CODED '1' (YES), CYCLE TO COLLECT THE |  
NEXT OTHER INCOME CATEGORY.

-----  
OTHERWISE END LOOP\_09, AND CONTINUE WITH BOX\_04

BOX\_04  
=====

-----  
GO TO NEXT QUESTIONNAIRE SECTION

MEPS FAMES Panel 5 Round 5 Income (IN) Section  
September 18, 2001