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 1996 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 3 RU MEMBER (INCLUDES DECEASED AND INSTITUTIONALIZED RU MEMBERS)
IF PERSON BEING LOOPED ON IS FLAGGED AS 'SECONDARY FILER ON JOINT FEDERAL TAX RETURN', GO TO END_LP01

OTHERWISE, CONTINUE WITH IN02

Has (PERSON) filed a 1996 Federal income tax return?

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

PRESS F1 FOR DEFINITION OF TAX RETURN.

Will (PERSON) file a 1996 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'.
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 3 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 34 (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).                |
------------------------------------------------------------------------
{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).            |
----------------------------------------------------
(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 26

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 40
FORM 1040A, LINE 24b

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 54
FORM 1040A, LINE 29c

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
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 1996 FEDERAL TAX RETURN. THIS LOOP CYCLES ON EACH PERSON ON THE RU-MEMBERS-ROSTER WHO MEETS THE FOLLOWING CONDITIONS:

[- PERSON HAS FILED A 1996 FEDERAL INCOME TAX RETURN (IN02 = 1) OR
  - PERSON WILL FILE A 1996 FEDERAL INCOME TAX RETURN (IN03 = 1)]
AND
- PERSON FLAGGED AS ‘PRIMARY FILER ON FEDERAL TAX RETURN’

IN17A
OMITTED
{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 1996. It would be useful to have out any tax materials that you may have.}

During 1996, 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 1996. 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}

<table>
<thead>
<tr>
<th>RANGE CHECK: 0-100</th>
</tr>
</thead>
</table>
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 1996]?

<table>
<thead>
<tr>
<th>Range</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 - 2,500</td>
<td>1</td>
</tr>
<tr>
<td>2,501 - 5,000</td>
<td>2</td>
</tr>
<tr>
<td>5,001 - 10,000</td>
<td>3</td>
</tr>
<tr>
<td>10,001 - 20,000</td>
<td>4</td>
</tr>
<tr>
<td>20,001 - 30,000</td>
<td>5</td>
</tr>
<tr>
<td>30,001 - 40,000</td>
<td>6</td>
</tr>
<tr>
<td>40,001 - 50,000</td>
<td>7</td>
</tr>
<tr>
<td>50,001 - 75,000</td>
<td>8</td>
</tr>
<tr>
<td>75,001 - 100,000</td>
<td>9</td>
</tr>
<tr>
<td>100,001 OR MORE</td>
<td>10</td>
</tr>
<tr>
<td>REF</td>
<td>-7</td>
</tr>
<tr>
<td>DK</td>
<td>-8</td>
</tr>
</tbody>
</table>

[Code One]
IN19
====

(PERSON'S FIRST MIDDLE AND LAST NAME)   (NAME OF SECONDARY FILER)

During 1996, 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 {IN19B}
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 IN19B |
-------------------------------

28-18
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] ......................... {IN19B}
REF ..................................... -7 {IN19B}
DK ..................................... -8 {IN19B}

<table>
<thead>
<tr>
<th>RANGE CHECK: 0-100</th>
</tr>
</thead>
</table>
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 1996]? 

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

INTERVIEWER: IS RESPONDENT WILLING TO CONTINUE ANSWERING TAXABLE INCOME QUESTIONS FOR THIS FILING UNIT?

YES .................................... 1
NO ..................................... 2 {END_LP02}

---

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.

---

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

---

OTHERWISE, GO TO IN30
During 1996, 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.
SHOW CARD IN-1.

Looking at this card, which range best estimates how much money was received from dividends in 1996?

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
During 1996, 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
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 1996]?

<table>
<thead>
<tr>
<th>Range</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 - 2,500</td>
<td>1</td>
</tr>
<tr>
<td>2,501 - 5,000</td>
<td>2</td>
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<td>5,001 - 10,000</td>
<td>3</td>
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<td>20,001 - 30,000</td>
<td>5</td>
</tr>
<tr>
<td>30,001 - 40,000</td>
<td>6</td>
</tr>
<tr>
<td>40,001 - 50,000</td>
<td>7</td>
</tr>
<tr>
<td>50,001 - 75,000</td>
<td>8</td>
</tr>
<tr>
<td>75,001 - 100,000</td>
<td>9</td>
</tr>
<tr>
<td>100,001 OR MORE</td>
<td>10</td>
</tr>
<tr>
<td>REF</td>
<td>-7</td>
</tr>
<tr>
<td>DK</td>
<td>-8</td>
</tr>
</tbody>
</table>

[Code One]
During 1996, 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                               |
---------------------------------------------------------------------
SHOW CARD IN-1.

Looking at this card, which range best estimates how much money was received [from alimony in 1996]?

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]
During 1996, 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.

SOFT RANGE CHECK: 0-300,000
INTERVIEWER: WAS THE AMOUNT ENTERED EARNINGS OR LOSS?

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

[Code One]

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 | {IN24} 'received'. IF IN23OV1 IS CODED '2' (LOSS), |
| Display 'lost'. |
| RANGE CHECK: 0-100 |

| CODE ONE |
| BOX IN23OV1 |

| IF IN04 IS CODED '2' (MARRIED FILING JOINT RETURN), CONTINUE WITH IN23OV2 |
| OTHERWISE, GO TO IN24 |

| RANGE CHECK: 0-100 |
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 1996]?

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]
During 1996, 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.

SOFT RANGE CHECK: 0-300,000

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

OTHERWISE, GO TO IN25
**INTERVIEWER:** WAS THE AMOUNT ENTERED A NET GAIN OR A NET LOSS?

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

[Code One]

**{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 1996]?

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

NET GAIN ............................... 1
NET LOSS ............................... 2
[Code One]

(PERSON'S FIRST MIDDLE AND LAST NAME) (NAME OF SECONDARY FILER)

During 1996, 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 10a

[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
-------

<table>
<thead>
<tr>
<th>IF AMOUNT OTHER THAN ZERO ENTERED AT IN25,</th>
<th>CONTINUE WITH IN25OV</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>OTHERWISE, GO TO IN26</th>
</tr>
</thead>
</table>

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 10b

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

<table>
<thead>
<tr>
<th>RANGE CHECK: 0-100</th>
</tr>
</thead>
</table>
Show card IN-1.

Looking at this card, which range best estimates how much money was received [from payments from IRAs in 1996]?

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]
During 1996, 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 16b
FORM 1040A, LINE 11b

[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 |
---
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 1996]?

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_02B

---

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

---

| OTHERWISE, CONTINUE WITH IN28 |

---
During 1996, 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 |  

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

OTHERWISE, GO TO IN29  

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

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

[Code One]

(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 1996]?

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

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

[Code One]

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

During 1996, 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.
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                                      |
----------------------------------------------------
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 1996]?

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}

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 1996, 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 12
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

-----

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 1996]?

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]
During 1996, 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 13a

[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 13b

[Enter Percent] ........................  (IN33)
REF ..................................... -7  (IN33)
DK ..................................... -8  (IN33)

----------------------------------------
| RANGE CHECK:  0-100                    |
----------------------------------------
Looking at this card, which range best estimates how much money was received [from Social Security and equivalent tier 1 Railroad Retirement benefits in 1996]?

<table>
<thead>
<tr>
<th>Range</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 - 2,500</td>
<td>1</td>
</tr>
<tr>
<td>2,501 - 5,000</td>
<td>2</td>
</tr>
<tr>
<td>5,001 - 10,000</td>
<td>3</td>
</tr>
<tr>
<td>10,001 - 20,000</td>
<td>4</td>
</tr>
<tr>
<td>20,001 - 30,000</td>
<td>5</td>
</tr>
<tr>
<td>30,001 - 40,000</td>
<td>6</td>
</tr>
<tr>
<td>40,001 - 50,000</td>
<td>7</td>
</tr>
<tr>
<td>50,001 - 75,000</td>
<td>8</td>
</tr>
<tr>
<td>75,001 - 100,000</td>
<td>9</td>
</tr>
<tr>
<td>100,001 OR MORE</td>
<td>10</td>
</tr>
<tr>
<td>REF</td>
<td>-7</td>
</tr>
<tr>
<td>DK</td>
<td>-8</td>
</tr>
</tbody>
</table>

[Code One]
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 1996, 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 1996?

PROBE: Anyone else receive Worker’s Compensation in 1996?

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 3 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 |
| 1996. THIS LOOP CYCLES ON EACH PERSON ON THE |
| RU-MEMBERS-ROSTER WHO MEETS THE FOLLOWING |
| CONDITIONS: |
| |
| - PERSON IS A CURRENT ROUND 3 RU MEMBER (INCLUDES |
| DECEASED AND INSTITUTIONALIZED RU MEMBERS) |
| - PERSON RECEIVED WORKER’S COMPENSATION IN 1996 |
| (SELECTED AT IN35) |

------------------------------------------------------------------
IN36
====

{PERSON'S FIRST MIDDLE AND LAST NAME}

How much money did (PERSON) receive from Worker’s Compensation [in 1996]?

[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 1996]?

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]
During 1996, 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
Who received Supplemental Security Income in 1996?

PROBE: Anyone else receive S.S.I. in 1996?

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 3 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 1996. THIS LOOP CYCLES ON EACH PERSON ON THE |
RU-MEMBERS-ROSTER WHO MEETS THE FOLLOWING |
CONDITIONS:
|
| - PERSON IS A CURRENT ROUND 3 RU MEMBER (INCLUDES |
| DECEASED AND INSTITUTIONALIZED RU MEMBERS) |
| - PERSON RECEIVED SUPPLEMENTAL SECURITY INCOME IN |
| 1996 (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 1996 did (PERSON) receive money from Supplemental Security Income?

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

RANGE CHECK: 1-12
{PERSON'S FIRST MIDDLE AND LAST NAME}

On average, how much money did (PERSON) get per month [from Supplemental Security Income in 1996]?

[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 1996]?

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

[Code One]
During 1996, did anyone in the family receive any money from public assistance (such as AFDC or general assistance)?

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

PRESS F1 FOR DEFINITION OF PUBLIC ASSISTANCE.
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 3 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 3 RU MEMBER (INCLUDES DECEASED AND INSTITUTIONALIZED RU MEMBERS) |
| - PERSON’S NAME WAS ON THE PUBLIC ASSISTANCE CHECKS (SELECTED AT IN42) |
------------------------------------------------------------------------------------------------------------------
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]
IN44
====

{PERSON'S FIRST MIDDLE AND LAST NAME}

Did any of (PERSON)’s checks include money from Aid to Families with Dependent Children, also known as AFDC or ADC?

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

PRESS F1 FOR DEFINITION OF AFDC.

IN45A
====

{PERSON'S FIRST MIDDLE AND LAST NAME}

For how many months in 1996 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 1996]?

[Enter $ Amount] ........................ {END_LP05}
REF ..................................... -7 {END_LP05}
DK ..................................... -8

------------------------------------------------------------------------
|  SOFT RANGE CHECK:  0-50,000                                       |  
------------------------------------------------------------------------
(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 1996]?

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

[Code One]
During 1996, 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.

Who received child support in 1996?

PROBE: Anyone else receive child support in 1996?

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.
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 1996. THIS LOOP CYCLES ON EACH PERSON ON THE RU-MEMBERS-ROSTER WHO MEETS THE FOLLOWING CONDITIONS:

- PERSON IS A CURRENT ROUND 3 RU MEMBER (INCLUDES DECEASED AND INSTITUTIONALIZED RU MEMBERS)
- PERSON RECEIVED CHILD SUPPORT IN 1996 (SELECTED AT IN47)

IN48A
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

For how many months in 1996 did (PERSON) receive money from child support?

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

RANGE CHECK: 1-12

28-63
On average, how much money did (PERSON) get per month [from child support in 1996]?

[Enter $ Amount] ......................... {END_LP06}
REF .................................... -7 {END_LP06}
DK ..................................... -8

SOFT RANGE CHECK: 0-100,000

looking at this card, which range best estimates how much money was received per month [from child support in 1996]?

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

[Code One]
Not counting military retirement, during 1996, 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 |

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 |

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IN49

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Who received veteran’s payments such as education or disability benefits [in 1996]?

PROBE: Anyone else receive veteran’s payments in 1996?

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 3 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 1996.|
| THIS LOOP CYCLES ON EACH PERSON ON THE RU-MEMBERS-|
| ROSTER WHO MEETS THE FOLLOWING CONDITIONS:     |
|                                               |
| - PERSON IS A CURRENT ROUND 3 RU MEMBER (INCLUDES|
|    DECEASED AND INSTITUTIONALIZED RU MEMBERS)   |
| - PERSON RECEIVED VETERAN’S PAYMENTS IN 1996    |
| (SELECTED AT IN50)                             |
-----------------------------------------------
{PERSON'S FIRST MIDDLE AND LAST NAME}

How much money did (PERSON) receive from veterans payments such as education or disability benefits in 1996? [Do not include military retirement.]

[Enter $ Amount] ....................... {END_LP07}
REF .................................... -7 {END_LP07}
DK ..................................... -8

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

{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 1996]?

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]
Besides what we have already talked about, during 1996, 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 |
Who received regular cash contributions from people who do not live in this household [in 1996]?

PROBE: Anyone else receive regular cash contributions, in 1996, 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]
For how many months in 1996 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  

<table>
<thead>
<tr>
<th>RANGE CHECK:  1-12</th>
</tr>
</thead>
</table>

On average, how much money did (PERSON) get per month [from regular cash contributions from people who do not live in this household, in 1996]?

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

| SOFT RANGE CHECK:  0-100,000 |
{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 1996]?

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 1996, 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.

28-71
For how many months in 1996 were these food stamps purchased or received?

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

<table>
<thead>
<tr>
<th>RANGE CHECK:  1-12</th>
</tr>
</thead>
</table>

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

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

<table>
<thead>
<tr>
<th>SOFT RANGE CHECK:  0-500</th>
</tr>
</thead>
</table>

What was the approximate monthly value of the stamps?

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

<table>
<thead>
<tr>
<th>SOFT RANGE CHECK:  0-1,000</th>
</tr>
</thead>
</table>
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
REF ................................... -7
DK .................................... -8

PRESS F1 FOR DEFINITIONS OF SHOW CARD CATEGORIES.

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 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.
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.

ENTER OTHER:

[Other Specify] .........................
REF ................................. -7 {BOX_03B}
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 |
-----------------------------------------------------
INCOME SOURCE: {DISPLAY CATEGORY SELECTED AT IN60........}

Who received income from (INCOME SOURCE) in 1996?

PROBE: Anyone else receive income from (INCOME SOURCE) in 1996?

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

What is the total amount received from (INCOME SOURCE), in 1996, 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 |

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

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

NET GAIN ............................... 1 {IN63}
NET LOSS ............................... 2 {IN63}
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 1996]?

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

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

[Code One]

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.