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 2005 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)         |
----------------------------------------------------
null
(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 LOOPEED 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 3 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’.                     |
----------------------------------------------------

29-4
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.
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 |
----------------------------------------------------

29-6
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 {IN17}  
  SHORT FORM 1040A .........................  2 {IN17}  
  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 39 (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
====

OMITTED.

IN12
====

OMITTED.

IN13
====

OMITTED.
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

<table>
<thead>
<tr>
<th>SOFT RANGE CHECK: 0-200,000</th>
</tr>
</thead>
</table>

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 31

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

[Code One]

PRESS F1 FOR DEFINITION OF HEALTH INSURANCE DEDUCTION.
{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 65a
FORM 1040A, LINE 41a

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). |
BOX_01
======
OMITTED.

LOOP_02
=======

----------------------------------------------------
| FOR EACH ELEMENT IN THE RU-MEMBERS-ROSTER,       |
| ASK BOX_01A - END_LP02                           |
----------------------------------------------------

----------------------------------------------------
| LOOP DEFINITION: LOOP_02 COLLECTS INFORMATION     |
| ON TAXABLE INCOME FOR EACH RU MEMBER WHO IS 16    |
| YEARS OF AGE OR OLDER OR HAS OR WILL FILE A 2005  |
| FEDERAL TAX RETURN. THIS LOOP CYCLES ON EACH      |
| PERSON ON THE RU-MEMBERS-ROSTER WHO MEETS THE    |
| FOLLOWING CONDITION:                              |
|                                                   |
| - PERSON IS A CURRENT ROUND 5 RU MEMBER (INCLUDES |
|   DECEASED AND INSTITUTIONALIZED RU MEMBERS)      |
----------------------------------------------------

IN17A
=====
OMITTED.
IF PERSON BEING LOOPED ON IS FLAGGED AS A 'PRIMARY FILER ON FEDERAL TAX RETURN', GO TO IN18

IF PERSON BEING LOOPED ON IS FLAGGED AS A 'SECONDARY FILER ON A JOINT FEDERAL TAX RETURN', GO TO END_LP02

OTHERWISE (I.E., PERSON IS NOT FLAGGED AS EITHER 'PRIMARY FILER ON FEDERAL TAX RETURN' OR A 'SECONDARY FILER ON A JOINT FEDERAL TAX RETURN', THAT IS, IN03 IS CODED '2' (NO), '-7' (REFUSED) OR '-8' (DON'T KNOW)), CONTINUE WITH BOX_01B

IF PERSON BEING LOOPED ON IS 16 YEARS OF AGE OR OLDER (OR IN AGE CATEGORIES 4-9), CONTINUE WITH IN18

OTHERWISE (I.E., PERSON IS LESS THAN 16 YEARS OF AGE (OR IN AGE CATEGORIES 1-3) AND IN03 IS CODED '2' (NO), '-7' (REFUSED), OR '-8' (DON'T KNOW)), CONTINUE WITH END_LP02
NOTE: THE PURPOSE OF BOX_01A AND BOX_01B IS TO SKIP OUT PERSONS ALREADY FLAGGED AS SECONDARY FILERS AND PERSONS YOUNGER THAN 16 YEARS OF AGE WHO HAVE NOT ALREADY REPORTED THAT HE/SHE HAS OR WILL FILE A FEDERAL INCOME TAX RETURN.

NOTE: PERSONS REPORTING THAT HE/SHE HAS/WILL FILE A 1040A SHORT FORM (IN09=2) OR A 1040EZ FORM (IN09=3) RECEIVE THE WAGES, INTEREST, DIVIDENDS, IRA, PENSIONS, UNEMPLOYMENT, AND SOCIAL SECURITY TAXABLE INCOME ITEMS.

PERSONS REPORTING THAT HE/SHE HAS/WILL FILE A 1040 LONG FORM, OTHER TYPE OF FORM, OR REFUSED OR DON’T KNOW THE TYPE OF FORM (IN09=1, 91, -7, -8) RECEIVE ALL THE TAXABLE INCOME QUESTIONS. THIS IS A CHANGE FROM PREVIOUS ROUNDS IN THAT THOSE PERSONS REPORTING REFUSED AND DON’T KNOW TO TYPE OF FORM DID NOT RECEIVE ANY QUESTIONS.

PERSONS REPORTING THAT THEY HAVE NOT AND WILL NOT FILE ANY FEDERAL TAX RETURN (IN03=2, -7, -8) AND IS 16 YEARS OF AGE OR OLDER ALSO RECEIVE ALL THE TAXABLE INCOME QUESTIONS. THIS IS ALSO A CHANGE FROM PREVIOUS ROUNDS IN THAT THOSE PERSONS REPORTING THAT THEY WERE NOT FILING DID NOT RECEIVE ANY QUESTIONS.
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 2005. It would be useful to have out any tax materials that you may have.

(Now let’s talk about (READ NAME(S) ABOVE).)

During 2005, 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.
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 2005]?

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 2005, 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 NECESSARY, SAY: If any interest from a joint account, include only the amount that would be (READ NAME(S) ABOVE)'s portion.}

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

[Enter $ Amount] .......................    {IN20}
REF .................................... -7 {IN20}
DK ..................................... -8 {IN19A}

PRESS F1 FOR DESCRIPTION OF AMOUNTS TO INCLUDE.

-----------------------------------------------------------------------------------
| DISPLAY 'IF NECESSARY, SAY ... ABOVE).' IF IN04 IS NOT CODED '2' (MARRIED, FILING JOINT RETURN OR IF IN04 WAS NOT ASKED. IF IN04 IS CODED '2' (MARRIED, FILING JOINT RETURN), USE A 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: 0-100,000 |
-----------------------------------------------------------------------------------

BOX_IN19
========
OMITTED.
IN19OV
=====

OMITTED.

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 2005]? 

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.                                           |
------------------------------------------------------------------
During 2005, how much money did (READ NAME(S) ABOVE) receive from dividends?

{IF NECESSARY, SAY: If any dividends from a joint source, include only the amount that would be (READ NAME(S) ABOVE)’s portion.}

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.

| DISPLAY ‘IF NECESSARY, SAY ... ABOVE).’ IF IN04 IS NOT CODED ‘2’ (MARRIED, FILING JOINT RETURN) OR IF IN04 WAS NOT ASKED. IF IN04 IS CODED ‘2’ (MARRIED, FILING JOINT RETURN), USE A 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: 0-100,000
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 2005]?

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), OR '3' |   |
| (SHORT FORM 1040EZ) GO TO IN25                  |   |
---------------------------------------------------------------------------------

---------------------------------------------------------------------------------
| OTHERWISE, CONTINUE WITH IN21                  |   |
---------------------------------------------------------------------------------
During 2005, how much money did (READ NAME(S) ABOVE) receive from refunds of state or local income taxes?

{IF NECESSARY, SAY: If any money from a joint return, include only the amount that would be (READ NAME(S) ABOVE)’s portion.}

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.
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 2005]?

- 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 2005, 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 2005]?

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 2005, how much money did (READ NAME(S) ABOVE) earn or lose from (his/her/their) own farm or non-farm business or practice?

{IF NECESSARY, SAY: If any money from a shared business, include only the amount that would be (READ NAME(S) ABOVE)’s portion.}

IF TAX FORM IS AVAILABLE, HAVE RESPONDENT REFER TO FORM 1040, LINES 12 AND 18

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

PRESS F1 FOR DESCRIPTION OF AMOUNTS TO INCLUDE.

| DISPLAY 'IF NECESSARY, SAY ... ABOVE).' IF IN04 IS NOT CODED ‘2’ (MARRIED, FILING JOINT RETURN | OR IF IN04 WAS NOT ASKED. IF IN04 IS CODED ‘2’ | (MARRIED, FILING JOINT RETURN), USE A 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_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 |
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November 29, 2005

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 farm or non-farm business or practice in 2005]?

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]
During 2005, 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 NECESSARY, SAY: If any money from a shared property or other asset, include only the amount that would be (READ NAME(S) ABOVE)’s portion.}

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

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

PRESS F1 FOR DESCRIPTION OF AMOUNTS TO INCLUDE.

------------------------------------------------------------------------------------------------------------------------
| DISPLAY 'IF NECESSARY, SAY ... ABOVE)'.’ IF IN04 IS NOT CODED ’2’ (MARRIED, FILING JOINT RETURN
| OR IF IN04 WAS NOT ASKED. IF IN04 IS CODED ’2’ (MARRIED, FILING JOINT RETURN), USE A 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_IN24
======

---

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

---

| OTHERWISE, GO TO IN25                      |
---

IN24OV
=====

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 2005]?

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 2005, how much money did (READ NAME(S) ABOVE) receive from payments from Individual Retirement Accounts, that is, IRA, Keogh, or 401K accounts?

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

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

PRESS F1 FOR DEFINITION OF IRA, KEOGH, AND 401K.

-----------------------------------------------
| 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 |
-----------------------------------------------
Looking at this card, which range best estimates how much money was received [from payments from IRA, Keogh, and 401K accounts in 2005]?

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 2005, 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 |
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 2005]?

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. |
---

| IF IN09 IS CODED ‘2’ (SHORT FORM 1040A) OR ‘3’ |
| SHORT FORM 1040EZ, GO TO IN30 |
---

| OTHERWISE, CONTINUE WITH IN28 |
---
{PERSON'S FIRST MIDDLE AND LAST NAME} {NAME OF SECONDARY FILER}

During 2005, 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 NECESSARY, SAY: If any money from a joint venture, include only the amount that would be (READ NAME(S) ABOVE)’s portion.}

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

[Enter $ Amount] .......................
REF .................................... -7 {IN30}
DK ..................................... -8 {IN28A}

PRESS F1 FOR DESCRIPTION OF AMOUNTS TO INCLUDE.

DISPLAY ‘IF NECESSARY, SAY ... ABOVE).’ IF IN04 IS NOT CODED ‘2’ (MARRIED, FILING JOINT RETURN) OR IF IN04 WAS NOT ASKED. IF IN04 IS CODED ‘2’ (MARRIED, FILING JOINT RETURN), USE A 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
IF AMOUNT OTHER THAN ZERO ENTERED AT IN28, CONTINUE WITH IN28OV.

OTHERWISE, GO TO IN30.
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 2005]?

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.

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

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

[Code One]
IN29
====  OMITTED.

BOX_IN29
========  OMITTED.

IN29OV1
=======  OMITTED.

BOX_IN29OV1
============  OMITTED.

IN29OV2
=======  OMITTED.

IN29A
====  OMITTED.

IN29AOV
=======  OMITTED.
IN30
====

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

During 2005, 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] ....................... {IN31}
REF .................................... -7 {IN31}
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
=======
OMITTED.

IN30OV
======
OMITTED.
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 2005]?

<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]

----------------------------------------------------
| 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

OMITTED.
IN31
====

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

During 2005, 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] ....................... {END_LP02}
REF .................................... -7 {END_LP02}
DK ..................................... -8 {IN32}

PRESS F1 FOR DEFINITION OF SOCIAL SECURITY.

| SOFT RANGE CHECK: 0-100,000 |

BOX_IN31
=======
OMITTED.

IN31OV
=====
OMITTED.
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 2005]?

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 2005, 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
Who received Worker’s Compensation in 2005?

PROBE: Anyone else receive Worker’s Compensation in 2005?

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]
IN36
====

{PERSON'S FIRST MIDDLE AND LAST NAME}

How much money did (PERSON) receive from Worker’s Compensation [in 2005]?

[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 2005]?

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 2005, 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                          |
----------------------------------------------------
MEPS FAMES Panel 9 Round 5 Income (IN) Section
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IN38
=====

Who received Supplemental Security Income in 2005?

PROBE: Anyone else receive S.S.I. in 2005?

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 2005. 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 |
|   2005 (SELECTED AT IN38) |
------------------------------
IF PERSON IS LESS THAN 65 YEARS OLD OR IN AGE CATEGORIES 1-8, CONTINUE WITH IN39

OTHERWISE, GO TO IN40A

{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]

{PERSON'S FIRST MIDDLE AND LAST NAME}

For how many months in 2005 did (PERSON) receive money from Supplemental Security Income?

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

RANGE CHECK: 1-12
On average, how much money did (PERSON) get per month [from Supplemental Security Income in 2005]?

[Enter $ Amount] ........................   {END_LP04}
REF .................................... -7 {END_LP04}
DK ..................................... -8

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

Looking at this card, which range best estimates how much money was received per month [from Supplemental Security Income in 2005]?

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

[Code One]
IN41
====

SHOW CARD IN-2A.

During 2005, did anyone in the family receive any money from public assistance, such as Temporary Assistance for Needy Families, also known as TANF (or the program(s) listed on this card), AFDC or general assistance)?

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

PRESS F1 FOR DEFINITION OF PUBLIC ASSISTANCE.

DISPLAY 'SHOW CARD IN-2A.' AND 'or the program(s) listed on this card' IF INTERVIEW STATE IS NOT DC, IL, IN, IA, KS, MS, NE, NV, PA, OK, OR, OR VA.

OTHERWISE, USE A NULL DISPLAY.

IF CODED '1' (YES) AND A SINGLE PERSON RU, AUTOMATICALLY CODE PERSON AS 'RECEIVED PUBLIC ASSISTANCE' AT IN42 AND GO TO LOOP_05
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 TANF 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]
SHOW CARD IN-2A.

Did any of (PERSON)’s checks include money from Temporary Assistance for Needy Families, also known as TANF (or the program(s) listed on this card)?

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

PRESS F1 FOR DEFINITION OF TANF.

| DISPLAY ‘SHOW CARD IN-2A.’ AND ‘or the program(s) listed on this card’ IF INTERVIEW STATE IS NOT DC, IL, IN, IA, KS, MS, NE, NV, PA, OK, OR, OR VA. | OTHERWISE, USE A NULL DISPLAY. |

IN45A

For how many months in 2005 did (PERSON) receive checks from public assistance?

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

| RANGE CHECK: 1-12 |
On average, how much money did (PERSON) get per month [from public assistance in 2005]?

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

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

SHOW CARD IN-2.

Looking at this card, which range best estimates how much money was received per month [from public assistance in 2005]?

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 2005, 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                                                          |
-----------------------------

Who received child support in 2005?

PROBE: Anyone else receive child support in 2005?

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 3 RU MEMBER |
| (INCLUDES DECEASED AND INSTITUTIONALIZED |
| RU MEMBERS)                             |
------------------------------
MEPS FAMES Panel 9 Round 5 Income (IN) Section
November 29, 2005

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 2005.      |
| 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 2005 (SELECTED|
|    AT IN47)                                     |
----------------------------------------------------

IN48A
-----

{PERSON'S FIRST MIDDLE AND LAST NAME}

For how many months in 2005 did (PERSON) receive money from child support?

[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 child support in 2005]? 

[Enter $ Amount] .........................  {END_LP06} 
REF ...................................... -7  {END_LP06} 
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 child support in 2005]?

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 2005, 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.
IN50
=====

Who received veteran’s payments such as education or disability benefits [in 2005]?  

PROBE: Anyone else receive veteran’s payments in 2005?  

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 2005.  
| 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 2005  
| (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 2005? [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 2005]?

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 2005, 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.
Who received regular cash contributions from people who do not live in this household [in 2005]?

PROBE: Anyone else receive regular cash contributions, in 2005, 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]
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 2005. 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 REGULAR CASH CONTRIBUTIONS
  FROM SOMEONE OUTSIDE OF THE HOUSEHOLD IN 2005
  (SELECTED AT IN53)

IN54A
-----

{PERSON'S FIRST MIDDLE AND LAST NAME}

For how many months in 2005 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 2005]?

[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 2005]?

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 2005, did anyone in the family receive food stamps?

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

PRESS F1 FOR DEFINITION OF FOOD STAMPS.
For how many months in 2005 were these food stamps received?

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

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

OMITTED.

What was the approximate monthly value of the stamps?

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

| SOFT RANGE CHECK:  0-1,000 |
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.
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]?

<table>
<thead>
<tr>
<th>Source</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>WAGES AND SALARY</td>
<td>1</td>
</tr>
<tr>
<td>FARM INCOME (OR LOSS)</td>
<td>2</td>
</tr>
<tr>
<td>BUSINESS INCOME (OR LOSS)</td>
<td>3</td>
</tr>
<tr>
<td>SOCIAL SECURITY/RAILROAD RETIREMENT</td>
<td>4</td>
</tr>
<tr>
<td>PRIVATE, MILITARY, OR GOVERNMENT PENSIONS</td>
<td>5</td>
</tr>
<tr>
<td>INTEREST</td>
<td>6</td>
</tr>
<tr>
<td>DIVIDENDS</td>
<td>7</td>
</tr>
<tr>
<td>RENTAL INCOME (OR LOSS)</td>
<td>8</td>
</tr>
<tr>
<td>OTHER SOURCE</td>
<td>91</td>
</tr>
<tr>
<td>REF</td>
<td>-7</td>
</tr>
<tr>
<td>DK</td>
<td>-8</td>
</tr>
</tbody>
</table>

[Code One]

PRESS F1 FOR DEFINITIONS OF ANSWER CATEGORIES.

ENTER OTHER:

<table>
<thead>
<tr>
<th>Other Specify</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>REF</td>
<td>-7</td>
</tr>
<tr>
<td>DK</td>
<td>-8</td>
</tr>
</tbody>
</table>
INCOME SOURCE:  {DISPLAY CATEGORY SELECTED AT IN60...........}

Who received income from (INCOME SOURCE) in 2005?

PROBE:  Anyone else receive income from (INCOME SOURCE) in 2005?

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) |
------------------------------------------------------------------------------------------------------------------

------------------------------------------------------------------------------------------------------------------
| FOR 'DISPLAY CATEGORY SELECTED AT IN60.....’,
| DISPLAY THE RESPONSE CATEGORY NAME SELECTED AT IN60 DURING THE CURRENT LOOP.
------------------------------------------------------------------------------------------------------------------
INCOME SOURCE: {DISPLAY CATEGORY SELECTED AT IN60........}

What is the total amount received from (INCOME SOURCE), in 2005, for all of the people just mentioned?

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

----------------------------------------------------
<p>| FOR 'DISPLAY CATEGORY SELECTED AT IN60.....',     |
| DISPLAY THE RESPONSE CATEGORY NAME SELECTED AT    |</p>
<table>
<thead>
<tr>
<th>IN60 DURING THE CURRENT LOOP.</th>
</tr>
</thead>
</table>

SOFT RANGE CHECK: 0-100,000

BOX_IN62

----------------------------------------------------
<p>| 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       |</p>
<table>
<thead>
<tr>
<th>IN62OV</th>
</tr>
</thead>
</table>

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]
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 2005]?

<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]

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 |
----------------------------------------------------
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.

| IF IN63 IS CODED '1' (YES), CYCLE TO COLLECT THE | NEXT OTHER INCOME CATEGORY. |
|---------------------------------------------------|
| OTHERWISE END LOOP_09, AND CONTINUE WITH BOX_04  |
Omitted.