For the next questions, it might be useful to have on hand 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.

PRESS ENTER OR SELECT NEXT PAGE TO CONTINUE.

---

NOTE: FOR ALL DOLLAR AMOUNT RANGE CHECKS, ALLOW THE ENTRY OF WHOLE DOLLAR AMOUNTS ONLY; DO NOT COLLECT CENTS.
LOOP_01
======

FOR EACH ELEMENT IN THE RU-MEMBERS-ROSTER, ASK NAV_IN01 - END_LP01

LOOP DEFINITION: LOOP_01 DETERMINES WHICH RU MEMBERS HAVE FILED OR WILL FILE A FEDERAL INCOME TAX FORM FOR THE CALENDAR YEAR. IF A JOINT RETURN WAS OR WILL BE FILED, THE LOOP Determines WHO IS THE SECONDARY FILER. THIS LOOP CYCLES ON PERSONS WHO MEET THE FOLLOWING CONDITION:

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

NAVIGATOR DETAILS: LOOP_01 USES NAV_IN01 TO CONTROL THE FLOW OF THE LOOP.

NAV_IN01
======

SERIES: Filing Federal Income Tax Return? (e.g., filed yet, filing status, who filing with, which 1040 form, type of deductions?)

USE THE LINKS BELOW TO COMPLETE ALL QUESTIONS WITHIN THIS SERIES.

WHEN ALL LINKS ARE MARKED "DONE," USE [Continue Interview] TO GO PAST THIS SERIES.

IF NEEDED, [Previous Page] WILL TAKE YOU TO QUESTIONS BEFORE THIS SERIES.

RU Member

[1. First Name,[Middle Name],Last Name-65] [Status-25]
[2. First Name,[Middle Name],Last Name-65] [Status-25]
[3. First Name,[Middle Name],Last Name-65] [Status-25]
ROSTER DETAILS:
COL # 1 HEADER: RU MEMBER
INSTRUCTIONS: DISPLAY RU MEMBER’S FIRST, MIDDLE, AND LAST NAMES (PERS.FULLNAME)
COL # 2 HEADER: EMPTY
INSTRUCTIONS: DISPLAY THE MOST CURRENT NAVIGATOR STATUS FOR EACH RU MEMBER EACH TIME THE NAVIGATOR IS PRESENTED

ROSTER DEFINITION:
THIS ITEM DISPLAYS RU-MEMBERS-ROSTER FOR SELECTION.

ROSTER BEHAVIOR:
1. SELECT ALLOWED.
2. MULTIPLE SELECT, ADD, DELETE, AND EDIT DISALLOWED.

ROSTER FILTER:
DISPLAY ALL RU MEMBERS INCLUDING DECEASED AND INSTITUTIONALIZED RU MEMBERS

CONTINUE WITH BOX_00 FOR SELECTED RU MEMBER.

BOX_00

IF PERSON BEING LOOPED ON IS Flagged AS ‘SECONDARY FILER ON JOINT FEDERAL TAX RETURN’, GO TO END_LP01

OTHERWISE, CONTINUE WITH IN02
IN02
====

{PERSON'S FIRST MIDDLE AND LAST NAME} Has (PERSON) filed a {YEAR} Federal income tax return?

YES .................................... 1 {IN04}
NO ..................................... 2 {IN03}
REF ................................... -7 {IN03}
DK .................................... -8 {IN03}

HELP AVAILABLE FOR DEFINITION OF TAX RETURN.

IN03
====

{PERSON'S FIRST MIDDLE AND LAST NAME} Will (PERSON) file a {YEAR} Federal income tax return?

YES .................................... 1 {IN04}
NO ..................................... 2 {END_LP01}
REF ................................... -7 {END_LP01}
DK .................................... -8 {END_LP01}

HELP AVAILABLE FOR DEFINITION OF TAX RETURN.
What {was/will be} (PERSON)’s filing status ...

- single; ................................ 1 {IN06}
- married filing joint return; .......... 2 {IN05}
- 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]

HELP AVAILABLE FOR DEFINITION OF RESPONSE CATEGORIES.
IN05
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

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

[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]

HELP AVAILABLE FOR DEFINITION OF 'FILING JOINTLY'.

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

-----------------------------------------------------------------------
| CONTINUE WITH IN06                                               |
-----------------------------------------------------------------------

-----------------------------------------------------------------------
| ROSTER DETAILS:                                                   |
| TITLE: RU_MEMBERS_1                                               |
| COL # 1 HEADER: NAME                                              |
| INSTRUCTIONS: DISPLAY RU MEMBER’S FIRST, MIDDLE,                  |
| AND LAST NAMES (PERS.FULLNAME)                                   |
-----------------------------------------------------------------------

-----------------------------------------------------------------------
| ROSTER DEFINITION:                                                |
| THIS ITEM DISPLAYS RU-MEMBERS-ROSTER FOR                          |
| SELECTION.                                                        |
-----------------------------------------------------------------------

-----------------------------------------------------------------------
| ROSTER BEHAVIOR:                                                  |
| 1. SELECT ALLOWED.                                               |
| 2. MULTIPLE SELECT, ADD, DELETE, AND EDIT DISALLOWED.             |
| 3. DISPLAY 'PERSON NOT IN RU' AS THE LAST ENTRY ON THE ROSTER.     |
-----------------------------------------------------------------------
ROSTER FILTER:
DISPLAY ALL RU MEMBERS WHO MEET THE FOLLOWING CONDITIONS:
- PERSON IS A CURRENT 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 FEDERAL TAX RETURN'

IN06
====

{PERSON'S FIRST MIDDLE AND LAST NAME}

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

YES .................................... 1 {IN07}
NO ..................................... 2 {IN09}
REF ................................... -7 {IN09}
DK .................................... -8 {IN09}

HELP AVAILABLE 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?

[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]

<p>| DISPLAY 'is' IF IN02 IS CODED '1' (YES). DISPLAY |</p>
<table>
<thead>
<tr>
<th>'will be' IF IN03 IS CODED '1' (YES).</th>
</tr>
</thead>
<tbody>
<tr>
<td>CONTINUE WITH BOX_IN07</td>
</tr>
<tr>
<td>--------------------------------------------------</td>
</tr>
</tbody>
</table>

| ROSTER DETAILS:                                    |
| TITLE: RU_MEMBERS_1                                 |
|                                                   |
| COL # 1 HEADER: NAME                               |
| INSTRUCTIONS: DISPLAY RU MEMBER'S FIRST, MIDDLE,   |
| AND LAST NAMES (PERS.FULLNAME)                     |
|                                                   |

| ROSTER DEFINITION:                                 |
| THIS ITEM DISPLAYS RU-MEMBERS-ROSTER FOR SELECTION.|
|                                                   |

| ROSTER BEHAVIOR:                                   |
| 1. MULTIPLE SELECT ALLOWED.                        |
|                                                   |
| 2. ADD, DELETE, AND EDIT DISALLOWED.               |
|                                                   |
| 3. DISPLAY 'PERSON(S) NOT IN RU' AS THE LAST ENTRY |
| ON THE ROSTER.                                    |
ROSTER FILTER:
DISPLAY ALL RU MEMBERS WHO MEET THE FOLLOWING CONDITIONS:
- PERSON IS A CURRENT RU MEMBER (INCLUDES DECEASED AND INSTITUTIONALIZED RU MEMBERS)
- PERSON IS NOT A JOINT FILER (I.E., PERSON WAS NOT SELECTED AT IN05)
- PERSON IS NOT CURRENTLY BEING LOOPED ON.

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

OTHERWISE, GO TO IN09

{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] ........... {IN09}
REF .................................... -7 {IN09}
DK ..................................... -8 {IN09}

HELP AVAILABLE FOR DEFINITION OF HOUSEHOLD.

SOFT CHECK:
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?

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>LONG FORM 1040</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>SHORT FORM 1040A</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>SHORT FORM 1040EZ</td>
<td></td>
</tr>
<tr>
<td>91</td>
<td>OTHER</td>
<td></td>
</tr>
<tr>
<td>-7</td>
<td>REF</td>
<td></td>
</tr>
<tr>
<td>-8</td>
<td>DK</td>
<td></td>
</tr>
</tbody>
</table>

[Code One]

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

IN10
====

{PERSON'S FIRST MIDDLE AND LAST NAME}

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

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>ITEMIZED DEDUCTIONS</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>STANDARD DEDUCTION</td>
<td></td>
</tr>
<tr>
<td>-7</td>
<td>REF</td>
<td></td>
</tr>
<tr>
<td>-8</td>
<td>DK</td>
<td></td>
</tr>
</tbody>
</table>

[Code One]

HELP AVAILABLE FOR DEFINITION OF ITEMIZED AND STANDARD
DEDUCTIONS.

| --- | | |
| --- | | |
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?

[Enter $ Amount] .......................    {IN15}
REF .................................... -7 {IN15}
DK ..................................... -8 {IN15}

----------------------------------------------------
<p>| DISPLAY 'was' IF IN02 IS CODED '1' (YES). DISPLAY|</p>
<table>
<thead>
<tr>
<th>'will be' IF IN03 IS CODED '1' (YES).</th>
</tr>
</thead>
</table>

<p>| BEGINNING IN PANEL 12, PRE-FILL CENTS DIGITS WITH |
| '00' SO THAT FIELD ACCEPTS WHOLE DOLLAR AMOUNT    |</p>
<table>
<thead>
<tr>
<th>ONLY.</th>
</tr>
</thead>
</table>

<p>| SOFT CHECK: |</p>
<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?

YES ........................................ 1 {IN17}
NO .......................................... 2 {IN17}
NOT APPLICABLE ......................... 3 {IN17}
REF ....................................... -7 {IN17}
DK ......................................... -8 {IN17}

[Code One]

HELP AVAILABLE FOR DEFINITION OF HEALTH INSURANCE DEDUCTION.

IN16
====

OMITTED.
IN17
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

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

YES .................................... 1 {END_LP01}
NO ..................................... 2 {END_LP01}
NOT APPLICABLE .......................... 3 {END_LP01}
REF ................................... -7 {END_LP01}
DK .................................... -8 {END_LP01}

[Code One]
HELP AVAILABLE 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 IN17A               |
----------------------------------------------------

BOX_01
=====

OMITTED.
TAXABLE INCOME QUESTIONS ARE NEXT.

SELECT NEXT PAGE OR PRESS ENTER TO CONTINUE.
SERIES: Taxable Income Information for Those Filing or Over 16 (e.g., wages, interest, dividends, business or property income or loss, IRAs, pensions, unemployment?)

USE THE LINKS BELOW TO COMPLETE ALL QUESTIONS WITHIN THIS SERIES.

WHEN ALL LINKS ARE MARKED “DONE,” USE [Continue Interview] TO GO PAST THIS SERIES.

IF NEEDED, [Previous Page] WILL TAKE YOU TO QUESTIONS BEFORE THIS SERIES.

**RU Member**

[1. First Name,[Middle Name],Last Name-65] [Status-25]
[2. First Name,[Middle Name],Last Name-65] [Status-25]
[3. First Name,[Middle Name],Last Name-65] [Status-25]
CONTINUE WITH BOX_01A FOR SELECTED RU MEMBER.

BOX_01A
========

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)), GO TO 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 THEY HAVE FILED OR WILL FILE A FEDERAL INCOME TAX RETURN.

NOTE: PERSONS REPORTING THAT THEY HAVE FILED OR 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 THEY HAVE FILED OR 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.

PERSONS REPORTING THAT THEY HAVE NOT AND WILL NOT FILE ANY FEDERAL TAX RETURN (IN03=2, -7, -8) AND ARE 16 YEARS OF AGE OR OLDER ALSO RECEIVE ALL THE TAXABLE INCOME QUESTIONS.
{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 {YEAR}. It would be useful to have out any tax materials that you may have.

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

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

[Enter $ Amount] .......................    {BOX_IN18}
REF .................................... -7 {IN19}
DK ..................................... -8 {IN18A}

HELP AVAILABLE FOR DESCRIPTION OF AMOUNTS TO INCLUDE.

| DISPLAY ‘People get money from many different | | DISPLAY ‘Now let’s talk about (READ NAME(S) | | FOR ‘NAME OF SECONDARY FILER’, DISPLAY THE | |
| sources, such as wages and salaries, social   | | ABOVE):’ IF NOT FIRST CYCLE THROUGH LOOP_02. IF | | PERSON’S NAME SELECTED AT IN05 DURING LOOP_01 FOR | |
| security, and interest on savings. The next  | | FIRST CYCLE THROUGH LOOP_02, USE A NULL DISPLAY. | | THE PRIMARY FILER CURRENTLY BEING ASKED ABOUT. IF | |
| few questions ask about different sources of  | | | | IN05 WAS NOT ASKED IN LOOP_01 FOR THIS PERSON, USE | |
| income that (READ NAME(S) ABOVE) received in | | | | A NULL DISPLAY. |
| {YEAR}. It would be useful to have out any tax | | | | |
(FOR SPECIFICATIONS PURPOSES ONLY; CAPI HANDLES AUTOMATICALLY:) IF ROUND 3, DISPLAY FIRST CALENDAR YEAR OF PANEL FOR {YEAR}. IF ROUND 5, DISPLAY SECOND CALENDAR YEAR OF PANEL FOR {YEAR}.

BEGINNING IN PANEL 12, PRE-FILL CENTS DIGITS WITH ‘00’ SO THAT FIELD ACCEPTS WHOLE DOLLAR AMOUNT ONLY.

SOFT CHECK:
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

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

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

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

HARD CHECK:
RANGE CHECK: 0-100
IN18A

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

SHOW CARD IN-1.

Which of the ranges on this card is the best estimate of how much money was received [from wages or salary, tips, commissions, or bonuses in {YEAR}]?

1 - 5,000 ........................................ 1 {IN19}
5,001 - 10,000 ............................. 2 {IN19}
10,001 - 15,000 ........................... 3 {IN19}
15,001 - 25,000 ........................... 4 {IN19}
25,001 - 50,000 ........................... 5 {IN19}
50,001 - 100,000 .......................... 6 {IN19}
100,001 OR MORE .......................... 7 {IN19}
REF ...................................... -7 {IN19}
DK ..................................... -8 {IN19}

[Code One]
IN19

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

During (YEAR), how much did (READ NAME(S) ABOVE) receive in taxable 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.}

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

HELP AVAILABLE 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.                                |
---------------------------------------------

---------------------------------------------
| (FOR SPECIFICATIONS PURPOSES ONLY; CAPI HANDLES |
| AUTOMATICALLY:) IF ROUND 3, DISPLAY FIRST CALENDAR |
| YEAR OF PANEL FOR {YEAR}. IF ROUND 5, DISPLAY |
| SECOND CALENDAR YEAR OF PANEL FOR (YEAR).        |
---------------------------------------------

---------------------------------------------
| BEGINNING IN PANEL 12, PRE-FILL CENTS DIGITS |
| WITH '00' SO THAT FIELD ACCEPETS WHOLE DOLLAR |
| AMOUNT ONLY.                                   |
---------------------------------------------
SOFT CHECK:

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-1A.

Which of the ranges on this card is the best estimate of how much money was received [in interest from savings accounts, bonds, NOW accounts, money market accounts, or similar types of investments in (YEAR)]?

1 - 100 ................................. 1 {IN20}
101 - 500 ............................... 2 {IN20}
501 - 1,000 ............................. 3 {IN20}
1,001 - 5,000 ........................... 4 {IN20}
5,001 - 15,000 .......................... 5 {IN20}
15,001 OR MORE .......................... 6 {IN20}
REF .................................... -7 {IN20}
DK ..................................... -8 {IN20}

[Code One]
IN19B
====
OMITTED.

BOX_02
=====
OMITTED.

IN20
====

(Person's first middle and last name) (Name of secondary filer)

During (year), 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.)

[Enter $ Amount] ....................... {BOX_02A}
REF .................................... -7 {BOX_02A}
DK ..................................... -8 {IN20A}

HELP AVAILABLE FOR DEFINITION OF DIVIDENDS.

| DISPLAY 'IF NECESSARY, SAY ... portion.' IF IN04 | OR IF IN04 WAS NOT ASKED. IF IN04 IS CODED '2' | 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.

(FOR SPECIFICATIONS PURPOSES ONLY; CAPI HANDLES AUTOMATICALLY:) IF ROUND 3, DISPLAY FIRST CALENDAR YEAR OF PANEL FOR {YEAR}. IF ROUND 5, DISPLAY SECOND CALENDAR YEAR OF PANEL FOR {YEAR}.

BEGINNING IN PANEL 12, PRE-FILL CENTS DIGITS WITH '00' SO THAT FIELD ACCEPTS WHOLE DOLLAR AMOUNT ONLY.

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

IN20A
=====

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

SHOW CARD IN-1A.

Which of the ranges on this card is the best estimate of how much money was received [from dividends in {YEAR}]?

1 - 100 ................................. 1 {BOX_02A}
101 - 500 ............................... 2 {BOX_02A}
501 - 1,000 ............................. 3 {BOX_02A}
1,001 - 5,000 ........................... 4 {BOX_02A}
5,001 - 15,000 .......................... 5 {BOX_02A}
15,001 OR MORE .......................... 6 {BOX_02A}
REF .................................... -7 {BOX_02A}
DK ..................................... -8 {BOX_02A}

[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.

(FOR SPECIFICATIONS PURPOSES ONLY; CAPI HANDLES AUTOMATICALLY:) IF ROUND 3, DISPLAY FIRST CALENDAR YEAR OF PANEL FOR {YEAR}. IF ROUND 5, DISPLAY SECOND CALENDAR YEAR OF PANEL FOR {YEAR}.

BOX_02A

IF IN09 IS CODED '2' (SHORT FORM 1040A), OR '3' (SHORT FORM 1040EZ) GO TO IN25

OTHERWISE, CONTINUE WITH IN21

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

During {YEAR}, 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.}

[Enter $ Amount] ....................... {IN22}
REF .................................... -7 {IN22}
DK ..................................... -8 {IN21A}

HELP AVAILABLE FOR DEFINITION OF INCOME TAX REFUNDS.
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.

----------------------------------------------------

(FOR SPECIFICATIONS PURPOSES ONLY; CAPI HANDLES AUTOMATICALLY:) IF ROUND 3, DISPLAY FIRST CALENDAR YEAR OF PANEL FOR (YEAR). IF ROUND 5, DISPLAY SECOND CALENDAR YEAR OF PANEL FOR (YEAR).

----------------------------------------------------

BEGINNING IN PANEL 12, PRE-FILL CENTS DIGITS WITH ‘00’ SO THAT FIELD ACCEPTS WHOLE DOLLAR AMOUNT ONLY.

----------------------------------------------------

SOFT CHECK:

SOFT RANGE CHECK: 0-100,000
{PERSON'S FIRST MIDDLE AND LAST NAME}     {NAME OF SECONDARY FILER}

SHOW CARD IN-1A.

Which of the ranges on this card is the best estimate of how much money was received [from refunds of state or local taxes in {YEAR}]?

<table>
<thead>
<tr>
<th>Range</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 - 100</td>
<td>1 IN22</td>
</tr>
<tr>
<td>101 - 500</td>
<td>2 IN22</td>
</tr>
<tr>
<td>501 - 1,000</td>
<td>3 IN22</td>
</tr>
<tr>
<td>1,001 - 5,000</td>
<td>4 IN22</td>
</tr>
<tr>
<td>5,001 - 15,000</td>
<td>5 IN22</td>
</tr>
<tr>
<td>15,001 OR MORE</td>
<td>6 IN22</td>
</tr>
<tr>
<td>REF</td>
<td>-7 IN22</td>
</tr>
<tr>
<td>DK</td>
<td>-8 IN22</td>
</tr>
</tbody>
</table>

[Code One]
IN22
====

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

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

[Enter $ Amount] .......................    {IN23}
REF .................................... -7 {IN23}
DK ..................................... -8 {IN22A}

HELP AVAILABLE 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.                                                   |
---------------------------------------------------------------------

---------------------------------------------------------------------
| (FOR SPECIFICATIONS PURPOSES ONLY; CAPI HANDLES                  |
| AUTOMATICALLY:) IF ROUND 3, DISPLAY FIRST CALENDAR YEAR OF PANEL |
| FOR (YEAR). IF ROUND 5, DISPLAY SECOND CALENDAR YEAR OF PANEL    |
| FOR (YEAR).                                                      |
---------------------------------------------------------------------

---------------------------------------------------------------------
| BEGINNING IN PANEL 12, PRE-FILL CENTS DIGITS WITH ‘00’ SO THAT   |
| FIELD ACCEPTS WHOLE DOLLAR AMOUNT ONLY.                          |
---------------------------------------------------------------------

---------------------------------------------------------------------
| SOFT CHECK:                                                      |
| SOFT RANGE CHECK: 0-100,000                                      |
---------------------------------------------------------------------
IN22A
=====

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

SHOW CARD IN-1A.

Which of the ranges on this card is the best estimate of how much money was received [from alimony in {YEAR}]?

1 - 100 .................................... 1 {IN23}
101 - 500 ................................. 2 {IN23}
501 - 1,000 ............................... 3 {IN23}
1,001 - 5,000 .......................... 4 {IN23}
5,001 - 15,000 ........................... 5 {IN23}
15,001 OR MORE .......................... 6 {IN23}
REF .................................... -7 {IN23}
DK ..................................... -8 {IN23}

[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. |
----------------------------------------

----------------------------------------
| (FOR SPECIFICATIONS PURPOSES ONLY; CAPI HANDLES |
| AUTOMATICALLY;) IF ROUND 3, DISPLAY FIRST CALENDAR |
| YEAR OF PANEL FOR {YEAR}. IF ROUND 5, DISPLAY |
| SECOND CALENDAR YEAR OF PANEL FOR {YEAR}. |
----------------------------------------
IN23
====

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

During {YEAR}, 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.}

[Enter $ Amount] .......................    {BOX_IN23}
REF .................................... -7 {IN24}
DK ..................................... -8 {IN23A}

HELP AVAILABLE 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. |
---------------------------------------------------------------------------------------------------------------------

---------------------------------------------------------------------------------------------------------------------
| (FOR SPECIFICATIONS PURPOSES ONLY; CAPI HANDLES AUTOMATICALLY:) IF ROUND 3, DISPLAY FIRST CALENDAR YEAR OF PANEL FOR {YEAR}. IF ROUND 5, DISPLAY SECOND CALENDAR YEAR OF PANEL FOR {YEAR}. |
---------------------------------------------------------------------------------------------------------------------

---------------------------------------------------------------------------------------------------------------------
| BEGINNING IN PANEL 12, PRE-FILL CENTS DIGITS WITH ‘00’ SO THAT FIELD ACCEPTS WHOLE DOLLAR AMOUNT ONLY. |
---------------------------------------------------------------------------------------------------------------------
SOFT CHECK:  
SOFT RANGE CHECK:  0-300,000

BOX_IN23
========

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

OTHERWISE, GO TO IN24

IN23OV1
=======

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

INTERVIEWER: WAS THE AMOUNT ENTERED EARNINGS OR LOSS?

EARNINGS ........................................ 1  {BOX_IN23OV1}
LOSS .............................................. 2  {BOX_IN23OV1}

[Code One]

HELP AVAILABLE FOR DESCRIPTION OF AMOUNTS TO INCLUDE.

BOX_IN23OV1
==========

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

OTHERWISE, GO TO IN24
IN23OV2

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

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

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

HELP AVAILABLE FOR DESCRIPTION OF AMOUNTS TO INCLUDE.

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

----------------------------------------------------
| HARD CHECK:                                       |
| RANGE CHECK:  0-100                                |
----------------------------------------------------

IN23A

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

SHOW CARD IN-1A.

Which of the ranges on this card is the best estimate of how much money was earned or lost [from (his/her/their) own farm or non-farm business or practice in {YEAR}]?

1 - 100 ........................................ 1 {IN23AOV}
101 - 500 .................................... 2 {IN23AOV}
501 - 1,000 .................................. 3 {IN23AOV}
1,001 - 5,000 ................................ 4 {IN23AOV}
5,001 - 15,000 ............................. 5 {IN23AOV}
15,001 OR MORE ............................ 6 {IN23AOV}
REF ........................................... -7 {IN24}
DK ........................................... -8 {IN24}

[Code One]
INTERVIEWER: DOES THE RANGE SELECTED REPRESENT EARNINGS OR LOSS?

EARNINGS ............................... 1 {IN24}
LOSS ................................... 2 {IN24}

[Code One]

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

During {YEAR}, 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.}

[Enter $ Amount] ............................. {BOX_IN24}
REF .......................... -7 {IN25}
DK ................................... -8 {IN24A}

HELP AVAILABLE 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.

(for specifications purposes only; CAPI handles automatically:) IF ROUND 3, DISPLAY FIRST CALENDAR YEAR OF PANEL FOR {YEAR}. IF ROUND 5, DISPLAY SECOND CALENDAR YEAR OF PANEL FOR {YEAR}.

BEGINNING IN PANEL 12, PRE-FILL CENTS DIGITS WITH '00' SO THAT FIELD ACCEPTS WHOLE DOLLAR AMOUNT ONLY.

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

BOX_IN24

---

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]

HELP AVAILABLE FOR DESCRIPTION OF AMOUNTS TO INCLUDE.

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

SHOW CARD IN-1A.

Which of the ranges on this card is the best estimate of 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 {YEAR}]?

1 - 100 ........................................ 1 {IN24AOV}
101 - 500 ..................................... 2 {IN24AOV}
501 - 1,000 .................................. 3 {IN24AOV}
1,001 - 5,000 .................................. 4 {IN24AOV}
5,001 - 15,000 .................................. 5 {IN24AOV}
15,001 OR MORE .................................. 6 {IN24AOV}
REF ...................................... -7 {IN25}
DK ..................................... -8 {IN25}

[Code One]

---------------
| FOR 'NAME OF SECONDARY FILER', DISPLAY THE | |
| PERSON’S NAME SELECTED AT IN05 DURING LOOP_01 FOR | |
| THE PRIMARY FILER CURRENTLY BEING ASKED ABOUT. IF | |
| IN05 WAS NOT ASKED IN LOOP_01 FOR THIS PERSON, USE | |
| A NULL DISPLAY. |
IN24AOV
=======

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

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

[Code One]

IN25
===

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

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

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

HELP AVAILABLE 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.                        |  |
-----------------------------------------------------------------------------
(FOR SPECIFICATIONS PURPOSES ONLY; CAPI HANDLES AUTOMATICALLY:) IF ROUND 3, DISPLAY FIRST CALENDAR YEAR OF PANEL FOR \{YEAR\}. IF ROUND 5, DISPLAY SECOND CALENDAR YEAR OF PANEL FOR \{YEAR\}.

BEGINNING IN PANEL 12, PRE-FILL CENTS DIGITS WITH '00' SO THAT FIELD ACCEPTS WHOLE DOLLAR AMOUNT ONLY.

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

---

BOX_IN25
========
OMITTED.

IN250V
======
OMITTED.

IN25A
=====

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

SHOW CARD IN-1A.

Which of the ranges on this card is the best estimate of how much money was received [from payments from IRA, Keogh, and 401K accounts in \{YEAR\}]?

1 - 100 .................................. 1 \{IN26\}
101 - 500 .................................. 2 \{IN26\}
501 - 1,000 .................................. 3 \{IN26\}
1,001 - 5,000 ................................. 4 \{IN26\}
5,001 - 15,000 ............................... 5 \{IN26\}
15,001 OR MORE ............................. 6 \{IN26\}
REF ........................................ -7 \{IN26\}
DK ......................................... -8 \{IN26\}

[Code One]
IN26

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

During {YEAR}, 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?

[Enter $ Amount] .......................   {BOX_02B}
REF .................................... -7 {BOX_02B}
DK ..................................... -8 {IN27}

HELP AVAILABLE FOR DESCRIPTION OF AMOUNTS TO INCLUDE.
(PERSON’S FIRST MIDDLE AND LAST NAME)     (NAME OF SECONDARY FILER)

SHOW CARD IN-1.

Which of the ranges on this card is the best estimate of how much money was received [from private pensions, military retirement, Other Federal government employee pensions, state or local government employee pensions, or annuities in {YEAR}]?

1 - 5,000 ..................................... 1 {BOX_02B}
5,001 - 10,000 ............................. 2 {BOX_02B}
10,001 - 15,000 ........................... 3 {BOX_02B}
15,001 - 25,000 ............................ 4 {BOX_02B}
25,001 - 50,000 ............................ 5 {BOX_02B}
50,001 - 100,000 ......................... 6 {BOX_02B}
100,001 OR MORE ........................... 7 {BOX_02B}
REF ........................................ -7 {BOX_02B}
DK .......................................... -8 {BOX_02B}

[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. | |

---
MEPS P15R5/P16R3/P17R1 Income (IN) Section
November 3, 2011

-------------------------------------------------------------------------------
| (FOR SPECIFICATIONS PURPOSES ONLY; CAPI HANDLES AUTOMATICALLY:) IF ROUND 3, DISPLAY FIRST CALENDAR YEAR OF PANEL FOR {YEAR}. IF ROUND 5, DISPLAY SECOND CALENDAR YEAR OF PANEL FOR {YEAR}. |
-------------------------------------------------------------------------------

BOX_02B
======

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

| OTHERWISE, CONTINUE WITH IN28 |
-------------------------------------------------------------------------------

IN28
====

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

During {YEAR}, 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.}

[Enter $ Amount] ....................... {BOX_IN28}
REF .................................... -7 {IN30}
DK ..................................... -8 {IN28A}

HELP AVAILABLE 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. |

| (FOR SPECIFICATIONS PURPOSES ONLY; CAPI HANDLES |
| AUTOMATICALLY:) IF ROUND 3, DISPLAY FIRST CALENDAR |
| YEAR OF PANEL FOR {YEAR}. IF ROUND 5, DISPLAY |
| SECOND CALENDAR YEAR OF PANEL FOR {YEAR}. |

| BEGINNING IN PANEL 12, PRE-FILL CENTS DIGITS |
| WITH ‘00’ SO THAT FIELD ACCEPTS WHOLE DOLLAR |
| AMOUNT ONLY. |

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

---

BOX_IN28


---

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

---

| OTHERWISE, GO TO IN30 |
INTERVIEWER: WAS THE AMOUNT ENTERED A NET GAIN OR A NET LOSS?

NET GAIN ..................................... 1 {IN30}
NET LOSS .................................... 2 {IN30}

[Code One]

HELP AVAILABLE FOR DESCRIPTION OF AMOUNTS TO INCLUDE.

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

SHOW CARD IN-1A.

Which of the ranges on this card is the best estimate of how much money was earned or lost [from estates or trusts, partnerships, S corporations, royalties, or from rental income in {YEAR}]?

1 - 100 ..................................... 1 {IN28AOV1}
101 - 500 ................................. 2 {IN28AOV1}
501 - 1,000 ............................... 3 {IN28AOV1}
1,001 - 5,000 ............................. 4 {IN28AOV1}
5,001 - 15,000 ........................... 5 {IN28AOV1}
15,001 OR MORE ........................... 6 {IN28AOV1}
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.

---

(FOR SPECIFICATIONS PURPOSES ONLY; CAPI HANDLES AUTOMATICALLY:) IF ROUND 3, DISPLAY FIRST CALENDAR YEAR OF PANEL FOR {YEAR}. IF ROUND 5, DISPLAY SECOND CALENDAR YEAR OF PANEL FOR {YEAR}.

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

NET GAIN ........................................ 1 [IN30]
NET LOSS ................................. 2 [IN30]

[Code One]
IN30
====

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

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

[Enter $ Amount] .....................  {IN31}
REF .................................... -7 {IN31}
DK ..................................... -8 {IN30A}

HELP AVAILABLE FOR DEFINITION OF UNEMPLOYMENT COMPENSATION.

--------------------------------------------------------------------------------------------------
<p>| 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 |</p>
<table>
<thead>
<tr>
<th>A NULL DISPLAY.</th>
</tr>
</thead>
</table>

--------------------------------------------------------------------------------------------------
<p>| (FOR SPECIFICATIONS PURPOSES ONLY; CAPI HANDLES |
| AUTOMATICALLY:) IF ROUND 3, DISPLAY FIRST CALENDAR |
| YEAR OF PANEL FOR {YEAR}. IF ROUND 5, DISPLAY |</p>
<table>
<thead>
<tr>
<th>SECOND CALENDAR YEAR OF PANEL FOR {YEAR}.</th>
</tr>
</thead>
</table>

--------------------------------------------------------------------------------------------------
<p>| BEGINNING IN PANEL 12, PRE-FILL CENTS DIGITS  |
| WITH '00' SO THAT FIELD ACCEPTS WHOLE DOLLAR |</p>
<table>
<thead>
<tr>
<th>AMOUNT ONLY.</th>
</tr>
</thead>
</table>

--------------------------------------------------------------------------------------------------
<p>| SOFT CHECK:                                      |</p>
<table>
<thead>
<tr>
<th>SOFT RANGE CHECK:  0-100,000</th>
</tr>
</thead>
</table>

BOX_IN30
========
OMITTED.

IN30OV
=====
OMITTED.
IN30A

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

SHOW CARD IN-1A.

Which of the ranges on this card is the best estimate of how much money was received [from unemployment compensation in {YEAR}]?

1 - 100 ........................................ 1 {IN31}
101 - 500 ....................................... 2 {IN31}
501 - 1,000 .................................... 3 {IN31}
1,001 - 5,000 .................................. 4 {IN31}
5,001 - 15,000 .................................. 5 {IN31}
15,001 OR MORE ................................. 6 {IN31}
REF ............................................. -7 {IN31}
DK ................................................ -8 {IN31}

[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.                                   |
----------------------------------------------------

----------------------------------------------------
| (FOR SPECIFICATIONS PURPOSES ONLY; CAPI HANDLES   |
| AUTOMATICALLY;) IF ROUND 3, DISPLAY FIRST CALENDAR|
| YEAR OF PANEL FOR {YEAR}. IF ROUND 5, DISPLAY     |
| SECOND CALENDAR YEAR OF PANEL FOR {YEAR}.         |
----------------------------------------------------

BOX_03

OMITTED.
IN31
====

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

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

[Enter $ Amount] .......................... {END_LP02}
REF .................................... -7 {END_LP02}
DK ..................................... -8 {IN32}

HELP AVAILABLE 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.                                   |
----------------------------------------------------

----------------------------------------------------
| (FOR SPECIFICATIONS PURPOSES ONLY; CAPI HANDLES |
| AUTOMATICALLY:) IF ROUND 3, DISPLAY FIRST CALENDAR |
| YEAR OF PANEL FOR {YEAR}. IF ROUND 5, DISPLAY |
| SECOND CALENDAR YEAR OF PANEL FOR {YEAR}.         |
----------------------------------------------------

----------------------------------------------------
| BEGINNING IN PANEL 12, PRE-FILL CENTS DIGITS      |
| WITH ‘00’ SO THAT FIELD ACCEPTS WHOLE DOLLAR |
| AMOUNT ONLY.                                      |
----------------------------------------------------

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

BOX_IN31
========
OMITTED.

IN31OV
======
OMITTED.
IN32
=====

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

SHOW CARD IN-1.

Which of the ranges on this card is the best estimate of how much money was received [from Social Security and equivalent tier 1 Railroad Retirement benefits in {YEAR}]?

1 - 5,000 ............................... 1 {END_LP02}
5,001 - 10,000 .......................... 2 {END_LP02}
10,001 - 15,000 ....................... 3 {END_LP02}
15,001 - 25,000 ....................... 4 {END_LP02}
25,001 - 50,000 ....................... 5 {END_LP02}
50,001 - 100,000 ..................... 6 {END_LP02}
100,001 OR MORE ..................... 7 {END_LP02}
REF .................................... -7 {END_LP02}
DK ..................................... -8 {END_LP02}

[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.

(FOR SPECIFICATIONS PURPOSES ONLY; CAPI HANDLES
AUTOMATICALLY:) IF ROUND 3, DISPLAY FIRST CALENDAR
YEAR OF PANEL FOR {YEAR}. IF ROUND 5, DISPLAY
SECOND CALENDAR YEAR OF PANEL FOR {YEAR}.

IN33
=====
OMITTED.

BOX_IN33
 =======
OMITTED.

IN33OV
=======
OMITTED.
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 (YEAR), did anyone in the family receive Worker’s Compensation?

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

HELP AVAILABLE FOR DEFINITION OF WORKER’S COMPENSATION.

------------------------
| (FOR SPECIFICATIONS PURPOSES ONLY; CAPI HANDLES |
| AUTOMATICALLY:) IF ROUND 3, DISPLAY FIRST CALENDAR|
| YEAR OF PANEL FOR (YEAR). IF ROUND 5, DISPLAY |
| SECOND CALENDAR YEAR OF PANEL FOR (YEAR).         |
------------------------

------------------------
| IF CODED ‘1’ (YES) AND A SINGLE PERSON RU, |
| AUTOMATICALLY CODE PERSON AS ‘RECEIVED WORKER’S |
| COMPENSATION’ AT IN35 AND GO TO LOOP_03         |
------------------------
IF CODED '1' (YES) AND A MULTI-PERSON RU, CONTINUE WITH IN35

---

Who received Worker’s Compensation in {YEAR}?

PROBE: Anyone else receive Worker’s Compensation in {YEAR}?

[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 SPECIFICATIONS PURPOSES ONLY; CAPI HANDLES AUTOMATICALLY:) IF ROUND 3, DISPLAY FIRST CALENDAR YEAR OF PANEL FOR {YEAR}. IF ROUND 5, DISPLAY SECOND CALENDAR YEAR OF PANEL FOR {YEAR}.

---

CONTINUE WITH LOOP_03

---

ROSTER DETAILS:
TITLE: RU_MEMBERS_1

COL # 1 HEADER: NAME
INSTRUCTIONS: DISPLAY RU MEMBER’S FIRST, MIDDLE, AND LAST NAMES (PERS.FULLNAME)

---

ROSTER DEFINITION:
THIS ITEM DISPLAYS RU-MEMBERS-ROSTER FOR SELECTION.
ROSTER BEHAVIOR:

1. MULTIPLE SELECT ALLOWED.

2. ADD, DELETE, AND EDIT DISALLOWED.

ROSTER FILTER:
DISPLAY ALL RU MEMBERS WHO MEET THE FOLLOWING CONDITION:
- PERSON IS A CURRENT RU MEMBER (INCLUDES DECEASED AND INSTITUTIONALIZED MEMBERS)

LOOP_03

FOR EACH ELEMENT IN THE RU-MEMBERS-ROSTER,
ASK NAV_IN03 - 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 THE CALENDAR YEAR. THIS LOOP CYCLES ON EACH PERSON ON THE RU-MEMBERS-ROSTER WHO MEETS THE FOLLOWING CONDITIONS:
- PERSON IS A CURRENT RU MEMBER (INCLUDES DECEASED AND INSTITUTIONALIZED RU MEMBERS)
- PERSON RECEIVED WORKER’S COMPENSATION IN THE CALENDAR YEAR (SELECTED AT IN35)

NAVIGATOR DETAILS: LOOP_03 USES NAV_IN03 TO CONTROL THE FLOW OF THE LOOP.
NAV_IN03
========

SERIES: Amount Received from Worker’s Compensation

USE THE LINKS BELOW TO COMPLETE ALL QUESTIONS WITHIN THIS SERIES.

WHEN ALL LINKS ARE MARKED “DONE,” USE [Continue Interview] TO GO PAST THIS SERIES.

IF NEEDED, [Previous Page] WILL TAKE YOU TO QUESTIONS BEFORE THIS SERIES.

RU Member

[1. First Name,[Middle Name],Last Name-65] [Status-25]
[2. First Name,[Middle Name],Last Name-65] [Status-25]
[3. First Name,[Middle Name],Last Name-65] [Status-25]

----------------------------------------------------
| ROSTER DETAILS:                                   |
| COL # 1 HEADER: RU MEMBER                         |
| INSTRUCTIONS: DISPLAY RU MEMBER’S FIRST, MIDDLE,  |
| AND LAST NAMES (PERS.FULLNAME)                    |
| COL # 2 HEADER: EMPTY                              |
| INSTRUCTIONS: DISPLAY THE MOST CURRENT NAVIGATOR |
| STATUS FOR EACH RU MEMBER EACH TIME THE NAVIGATOR |
| IS PRESENTED                                      |
----------------------------------------------------

----------------------------------------------------
| ROSTER DEFINITION:                                |
| THIS ITEM DISPLAYS RU-MEMBERS-ROSTER FOR SELECTION.|
----------------------------------------------------

----------------------------------------------------
| ROSTER BEHAVIOR:                                 |
| 1. SELECT ALLOWED.                              |
| 2. MULTIPLE SELECT, ADD, DELETE, AND EDIT DISALLOWED.|
----------------------------------------------------
STOP FILTER:
DISPLAY ALL RU MEMBERS RU-MEMBERS-ROSTER WHO
MEET THE FOLLOWING CONDITIONS:
- PERSON IS A CURRENT RU MEMBER (INCLUDES DECEASED
  AND INSTITUTIONALIZED RU MEMBERS)
- PERSON RECEIVED WORKER’S COMPENSATION IN THE
  CALENDAR YEAR (SELECTED AT IN35)

CONTINUE WITH IN36 FOR SELECTED RU MEMBER.

IN36

{PERSON'S FIRST MIDDLE AND LAST NAME}

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

[Enter $ Amount] ....................... {END LP03}
REF ................................. -7 {END LP03}
DK ................................. -8 {IN36A}

BEGINNING IN PANEL 12, PRE-FILL CENTS DIGITS
WITH ‘00’ SO THAT FIELD ACCEPTS WHOLE DOLLAR
AMOUNT ONLY.

SOFT CHECK:
SOFT RANGE CHECK: 0-50,000
IN36A
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

SHOW CARD IN-1A.

Which of the ranges on this card is the best estimate of how much money was received [from Worker’s Compensation in {YEAR}]?

1 - 100 ................................. 1 {END_LP03}
101 - 500 ............................... 2 {END_LP03}
501 - 1,000 .............................. 3 {END_LP03}
1,001 - 5,000 ........................... 4 {END_LP03}
5,001 - 15,000 .......................... 5 {END_LP03}
15,001 OR MORE .......................... 6 {END_LP03}
REF .................................... -7 {END_LP03}
DK ..................................... -8 {END_LP03}

[Code One]

----------
| (FOR SPECIFICATIONS PURPOSES ONLY; CAPI HANDLES |
| AUTOMATICALLY:) IF ROUND 3, DISPLAY FIRST CALENDAR |
| YEAR OF PANEL FOR {YEAR}. IF ROUND 5, DISPLAY |
| SECOND CALENDAR YEAR OF PANEL FOR {YEAR}. |
----------

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 |
----------
During {YEAR}, 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]

HELP AVAILABLE FOR DEFINITION OF S.S.I.

<table>
<thead>
<tr>
<th>(FOR SPECIFICATIONS PURPOSES ONLY; CAPI HANDLES</th>
<th>AUTOMATICALLY:) IF ROUND 3, DISPLAY FIRST CALENDAR YEAR OF PANEL FOR {YEAR}. IF ROUND 5, DISPLAY</th>
<th>SECOND CALENDAR YEAR OF PANEL FOR {YEAR}.</th>
</tr>
</thead>
</table>

 IF CODED ‘1’ (YES) AND A SINGLE PERSON RU, |
 AUTOMATICALLY CODE PERSON AS ‘RECEIVED S.S.I.’ AT |
 IN38 AND GO TO LOOP_04

 IF CODED ‘1’ (YES) AND A MULTI-PERSON RU, |
 CONTINUE WITH IN38

Who received Supplemental Security Income in {YEAR}?

PROBE: Anyone else receive S.S.I. in {YEAR}?

[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]
CONTINUE WITH LOOP_04

ROSTER DETAILS:
TITLE: RU_MEMBERS_1

COL # 1 HEADER: NAME
INSTRUCTIONS: DISPLAY RU MEMBER’S FIRST, MIDDLE, AND LAST NAMES (PERS.FULLNAME)

ROSTER DEFINITION:
THIS ITEM DISPLAYS RU-MEMBERS-ROSTER FOR SELECTION.

ROSTER BEHAVIOR:
1. MULTIPLE SELECT ALLOWED.
2. ADD, DELETE, AND EDIT DISALLOWED.

ROSTER FILTER:
DISPLAY ALL RU MEMBERS WHO MEET THE FOLLOWING CONDITION:
- PERSON IS A CURRENT RU MEMBER (INCLUDES DECEASED AND INSTITUTIONALIZED RU MEMBERS)
LOOP_04
=======

| FOR EACH ELEMENT IN THE RU-MEMBERS-ROSTER,               |
| ASK NAV_IN04 - 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 the calendar year. This loop cycles on each person on the RU-Members-Roster who meets the following conditions:

- Person is a current RU member (includes deceased and institutionalized RU members)
- Person received supplemental security income in the calendar year (selected at IN38)

NAVIGATOR DETAILS: LOOP_04 uses NAV_IN04 to control the flow of the loop.

NAV_IN04
=======

SERIES: Supplemental Security Income – Number of Months Received and Amount Received Monthly

USE THE LINKS BELOW TO COMPLETE ALL QUESTIONS WITHIN THIS SERIES.

WHEN ALL LINKS ARE MARKED "DONE," USE [Continue Interview] TO GO PAST THIS SERIES.

IF NEEDED, [Previous Page] WILL TAKE YOU TO QUESTIONS BEFORE THIS SERIES.

RU Member
[1. First Name,[Middle Name],Last Name-65] [Status-25]
[2. First Name,[Middle Name],Last Name-65] [Status-25]
[3. First Name,[Middle Name],Last Name-65] [Status-25]
ROSTER DETAILS:
COL # 1 HEADER: RU MEMBER
INSTRUCTIONS: DISPLAY RU MEMBER’S FIRST, MIDDLE, AND LAST NAMES (PERS.FULLNAME)
COL # 2 HEADER: EMPTY
INSTRUCTIONS: DISPLAY THE MOST CURRENT NAVIGATOR STATUS FOR EACH RU MEMBER EACH TIME THE NAVIGATOR IS PRESENTED

ROSTER DEFINITION:
THIS ITEM DISPLAYS RU-MEMBERS-ROSTER FOR SELECTION.

ROSTER BEHAVIOR:
1. SELECT ALLOWED.
2. MULTIPLE SELECT, ADD, DELETE, AND EDIT DISALLOWED.

ROSTER FILTER:
DISPLAY ALL RU MEMBERS RU-MEMBERS-ROSTER WHO MEET THE FOLLOWING CONDITIONS:
- PERSON IS A CURRENT RU MEMBER (INCLUDES DECEASED AND INSTITUTIONALIZED RU MEMBERS)
- PERSON RECEIVED SUPPLEMENTAL SECURITY INCOME IN THE CALENDAR YEAR (SELECTED AT IN38)

CONTINUE WITH BOX_03A FOR SELECTED RU MEMBER.

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 {IN40A}
SOME OTHER REASON ....................... 2 {IN40A}
REF .................................... -7 {IN40A}
DK ..................................... -8 {IN40A}

[Code One]

IN40A
====

{PERSON'S FIRST MIDDLE AND LAST NAME}

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

[Enter Number of Months] ................... {IN40B}
REF .................................... -7 {IN40B}
DK ..................................... -8 {IN40B}
{PERSON'S FIRST MIDDLE AND LAST NAME}

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

[Enter $ Amount] ........................ {END_LP04}
REF .................................... -7 {END_LP04}
DK ..................................... -8 {IN40C}

----------------------------------------------------
| (FOR SPECIFICATIONS PURPOSES ONLY; CAPI HANDLES |
| AUTOMATICALLY:) IF ROUND 3, DISPLAY FIRST CALENDAR |
| YEAR OF PANEL FOR {YEAR}. IF ROUND 5, DISPLAY |
| SECOND CALENDAR YEAR OF PANEL FOR {YEAR}. |
----------------------------------------------------

----------------------------------------------------
| BEGINNING IN PANEL 12, PRE-FILL CENTS DIGITS |
| WITH ‘00’ SO THAT FIELD ACCEPTS WHOLE DOLLAR |
| AMOUNT ONLY. |
----------------------------------------------------

----------------------------------------------------
| SOFT CHECK: |
| SOFT RANGE CHECK: 0-50,000 |
----------------------------------------------------
SHOW CARD IN-2.

Which of the ranges on this card is the best estimate of how much money was received per month [from Supplemental Security Income in \{YEAR\}]?

1 - 250 ................................. 1 {END_LP04}
251 - 500 ............................... 2 {END_LP04}
501 - 750 ............................... 3 {END_LP04}
751 - 1,000 ............................. 4 {END_LP04}
1,001 OR MORE ........................... 5 {END_LP04}
REF .................................... -7 {END_LP04}
DK ..................................... -8 {END_LP04}

[Code One]
During {YEAR}, did anyone in the family receive any money from public assistance, such as Temporary Assistance for Needy Families, also known as TANF{, {STATE TANF NAME 1}},{, {STATE TANF NAME 2}},{, {STATE TANF NAME 3}}, or general assistance?

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

HELP AVAILABLE FOR DEFINITION OF PUBLIC ASSISTANCE.

Display ‘, {STATE TANF NAME 1}’ (Substituting the real state name for the TANF program) if the state in which interview is being conducted has one or more TANF name(s). Otherwise, use a NULL display.

Display ‘, {STATE TANF NAME 2}’ (Substituting the real state name for the TANF program) if the state in which interview is being conducted has a second other TANF name. Otherwise, use a NULL display.

Display ‘, {STATE TANF NAME 3}’ (Substituting the real state name for the TANF program) if the state in which interview is being conducted has a third other TANF name. Otherwise, use a NULL display.

For the specific name to use by state, see Attachment 37.

(FOR SPECIFICATIONS PURPOSES ONLY; CAPI HANDLES AUTOMATICALLY;) If round 3, display first calendar year of panel for {YEAR}. If round 5, display second calendar year of panel for {YEAR}.

If coded ‘1’ (YES) and a single person RU, automatically code person as ‘received public assistance’ at IN42 and go to LOOP_05.
IN42
====

Whose name was on the checks?

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

[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]

| CONTINUE WITH LOOP_05 |
ROSTER FILTER:
DISPLAY ALL RU MEMBERS WHO MEET THE FOLLOWING CONDITION:

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

LOOP_05

FOR EACH ELEMENT IN THE RU-MEMBERS-ROSTER, ASK NAV_IN05 - 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 RU MEMBER (INCLUDES DECEASED AND INSTITUTIONALIZED RU MEMBERS)
- PERSON’S NAME WAS ON THE PUBLIC ASSISTANCE CHECKS (SELECTED AT IN42)

NAVIGATOR DETAILS: LOOP_05 USES NAV_IN05 TO CONTROL THE FLOW OF THE LOOP.
NAV_IN05

SERIES: Public Assistance (who covered, TANF included, number of months received, amount received monthly)

USE THE LINKS BELOW TO COMPLETE ALL QUESTIONS WITHIN THIS SERIES.

WHEN ALL LINKS ARE MARKED “DONE,” USE [Continue Interview] TO GO PAST THIS SERIES.

IF NEEDED, [Previous Page] WILL TAKE YOU TO QUESTIONS BEFORE THIS SERIES.

RU Member

[1. First Name, [Middle Name], Last Name-65] [Status-25]
[2. First Name, [Middle Name], Last Name-65] [Status-25]
[3. First Name, [Middle Name], Last Name-65] [Status-25]

----------------------------------------------------
| ROSTER DETAILS: |
| COL # 1 HEADER: RU MEMBER |
| INSTRUCTIONS: DISPLAY RU MEMBER’S FIRST, MIDDLE, AND LAST NAMES (PERS.FULLNAME) |
| COL # 2 HEADER: EMPTY |
| INSTRUCTIONS: DISPLAY THE MOST CURRENT NAVIGATOR STATUS FOR EACH RU MEMBER EACH TIME THE NAVIGATOR IS PRESENTED |
----------------------------------------------------

----------------------------------------------------
| ROSTER DEFINITION: |
| THIS ITEM DISPLAYS RU-MEMBERS-ROSTER FOR SELECTION. |
----------------------------------------------------

----------------------------------------------------
| ROSTER BEHAVIOR: |
| 1. SELECT ALLOWED. |
| 2. MULTIPLE SELECT, ADD, DELETE, AND EDIT DISALLOWED. |
----------------------------------------------------
ROSTER FILTER:
DISPLAY ALL RU MEMBERS RU-MEMBERS-ROSTER WHO
MEET THE FOLLOWING CONDITIONS:
- PERSON IS A CURRENT RU MEMBER (INCLUDES DECEASED
AND INSTITUTIONALIZED RU MEMBERS)
- PERSON’S NAME WAS ON THE PUBLIC ASSISTANCE
CHECKS (SELECTED AT IN42)

CONTINUE WITH IN43 FOR SELECTED RU MEMBER.

IN43

{PERSON'S FIRST MIDDLE AND LAST NAME}

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

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

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

[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]

CONTINUE WITH IN44

ROSTER DETAILS:
TITLE: RU_MEMBERS_1

COL # 1 HEADER: NAME
INSTRUCTIONS: DISPLAY RU MEMBER’S FIRST, MIDDLE,
AND LAST NAMES (PERS.FULLNAME)
ROSTER DEFINITION:
THIS ITEM DISPLAYS RU-MEMBERS-ROSTER FOR SELECTION.

ROSTER BEHAVIOR:
1. MULTIPLE SELECT ALLOWED.

2. ADD, DELETE, AND EDIT DISALLOWED.

3. DISPLAY ‘PERSON NOT IN RU’ AS THE 2ND TO LAST ENTRY ON THE ROSTER.

4. DISPLAY ‘CHECK ONLY COVERS (PERSON) IN HEADER’ AS THE LAST ENTRY ON THE ROSTER.

ROSTER FILTER:
DISPLAY ALL RU MEMBERS WHO MEET THE FOLLOWING CONDITIONS:

- PERSON IS A CURRENT RU MEMBER (INCLUDES DECEASED AND INSTITUTIONALIZED RU MEMBERS)
- PERSON IS NOT SELECTED AS RECEIVING HIS OWN PUBLIC ASSISTANCE CHECKS; THAT IS PERSON WAS NOT SELECTED AT IN42
Did any of (PERSON)’s checks include money from Temporary Assistance for Needy Families, also known as TANF, or (STATE TANF NAME 1), or (STATE TANF NAME 2), or (STATE TANF NAME 3)?

YES .................................... 1 {IN45A}
NO ..................................... 2 {IN45A}
REF ................................... -7 {IN45A}
DK .................................... -8 {IN45A}

HELP AVAILABLE FOR DEFINITION OF TANF.

DISPLAY ‘,’ IF THE STATE IN WHICH INTERVIEW IS BEING CONDUCTED HAS AT TWO OR MORE OTHER STATE SPECIFIC TANF NAMES. DISPLAY ‘or’ IF THE STATE IN WHICH INTERVIEW IS BEING CONDUCTED HAS ONLY ONE STATE SPECIFIC TANF NAME. USE A NULL DISPLAY IF STATE HAS NO STATE SPECIFIC TANF NAMES.

DISPLAY ‘{STATE TANF NAME 1}’ (SUBSTITUTING THE REAL STATE NAME FOR THE TANF PROGRAM) IF THE STATE IN WHICH INTERVIEW IS BEING CONDUCTED HAS ONE OR MORE TANF NAME(S). OTHERWISE, USE A NULL DISPLAY.

DISPLAY ‘,’ IF THE STATE IN WHICH INTERVIEW IS BEING CONDUCTED HAS THREE OTHER STATE SPECIFIC TANF NAMES. DISPLAY ‘, or’ IF THE STATE IN WHICH INTERVIEW IS BEING CONDUCTED HAS TWO STATE TANF NAMES. USE A NULL DISPLAY IF STATE HAS ZERO OR ONLY ONE STATE SPECIFIC TANF NAME.

DISPLAY ‘{STATE TANF NAME 2}’ (SUBSTITUTING THE REAL STATE NAME FOR THE TANF PROGRAM) IF THE STATE IN WHICH INTERVIEW IS BEING CONDUCTED HAS A SECOND OTHER TANF NAME. OTHERWISE, USE A NULL DISPLAY.

DISPLAY ‘, or {STATE TANF NAME 3}’ (SUBSTITUTING THE REAL STATE NAME FOR THE TANF PROGRAM) IF THE STATE IN WHICH INTERVIEW IS BEING CONDUCTED HAS A THIRD OTHER TANF NAME. OTHERWISE, USE A NULL DISPLAY.

FOR THE SPECIFIC NAME TO USE BY STATE, SEE ATTACHMENT 37.
For how many months in {YEAR} did (PERSON) receive checks from public assistance?

[Enter Number of Months] ................   {IN45B}
REF .................................... -7 {IN45B}
DK ..................................... -8 {IN45B}

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

[Enter $ Amount] ........................   {END_LP05}
REF .................................... -7 {END_LP05}
DK ..................................... -8 {IN45C}
IN45C

{PERSON'S FIRST MIDDLE AND LAST NAME}

SHOW CARD IN-2.

Which of the ranges on this card is the best estimate of how much money was received per month [from public assistance in {YEAR}]?

1 - 250 ................................. 1 {END_LP05}
251 - 500 ............................... 2 {END_LP05}
501 - 750 ............................... 3 {END_LP05}
751 - 1,000 ............................. 4 {END_LP05}
1,001 OR MORE ........................... 5 {END_LP05}
REF .................................... -7 {END_LP05}
DK ..................................... -8 {END_LP05}

[Code One]

---------------
| (FOR SPECIFICATIONS PURPOSES ONLY; CAPI HANDLES AUTOMATICALLY:) IF ROUND 3, DISPLAY FIRST CALENDAR YEAR OF PANEL FOR {YEAR}. IF ROUND 5, DISPLAY SECOND CALENDAR YEAR OF PANEL FOR {YEAR}. |
---------------

END_LP05

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

| IF NO OTHER PERSONS MEET THE STATED CONDITIONS, END LOOP_05 AND CONTINUE WITH IN46 |
--------------
During {YEAR}, did anyone in the family receive any money from child support?

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

HELP AVAILABLE FOR DEFINITION OF CHILD SUPPORT.

| (FOR SPECIFICATIONS PURPOSES ONLY; CAPI HANDLES AUTOMATICALLY:) IF ROUND 3, DISPLAY FIRST CALENDAR YEAR OF PANEL FOR {YEAR}. IF ROUND 5, DISPLAY SECOND CALENDAR YEAR OF PANEL FOR {YEAR}. |

| IF CODED ‘1’ (YES) AND A SINGLE PERSON RU, AUTOMATICALLY CODE PERSON AS ‘RECEIVED CHILD SUPPORT’ AT IN47 AND GO TO LOOP_06 |

| IF CODED ‘1’ (YES) AND A MULTI-PERSON RU, CONTINUE WITH IN47 |

Who received child support in {YEAR}?

PROBE: Anyone else receive child support in {YEAR}?

[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]

HELP AVAILABLE FOR DESCRIPTION OF WHO TO INCLUDE.
(FOR SPECIFICATIONS PURPOSES ONLY; CAPI HANDLES AUTOMATICALLY:) IF ROUND 3, DISPLAY FIRST CALENDAR YEAR OF PANEL FOR {YEAR}. IF ROUND 5, DISPLAY SECOND CALENDAR YEAR OF PANEL FOR {YEAR}.

----------------------------------------------------
CONTINUE WITH LOOP_06
----------------------------------------------------

ROSTER DETAILS:
TITLE: RU_MEMBERS_1

COL # 1 HEADER: NAME
INSTRUCTIONS: DISPLAY RU MEMBER’S FIRST, MIDDLE, AND LAST NAMES (PERS.FULLNAME)

----------------------------------------------------

ROSTER DEFINITION:
THIS ITEM DISPLAYS RU-MEMBERS-ROSTER FOR SELECTION.

----------------------------------------------------

ROSTER BEHAVIOR:
1. MULTIPLE SELECT ALLOWED.
2. ADD, DELETE, AND EDIT DISALLOWED.

----------------------------------------------------

ROSTER FILTER:
DISPLAY ALL RU MEMBERS WHO MEET THE FOLLOWING CONDITION:
- PERSON IS A CURRENT RU MEMBER (INCLUDES DECEASED AND INSTITUTIONALIZED RU MEMBERS)
LOOP_06
=======

|--| FOR EACH ELEMENT IN THE RU-MEMBERS-ROSTER, | ASK NAV_IN06 - END_LP06 |

LOOP DEFINITION: LOOP_06 DETERMINES HOW MUCH MONEY WAS RECEIVED FROM CHILD SUPPORT FOR RU MEMBERS WHO RECEIVED CHILD SUPPORT IN CALENDAR YEAR. THIS LOOP CYCLES ON EACH PERSON ON THE RU-MEMBERS-ROSTER WHO MEETS THE FOLLOWING CONDITIONS:

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

NAVIGATOR DETAILS: LOOP_06 USES NAV_IN06 TO CONTROL THE FLOW OF THE LOOP.

NAV_IN06
=======

SERIES: Child Support – Number of Months Received and Amount Received Monthly

USE THE LINKS BELOW TO COMPLETE ALL QUESTIONS WITHIN THIS SERIES.

WHEN ALL LINKS ARE MARKED "DONE," USE [Continue Interview] TO GO PAST THIS SERIES.

IF NEEDED, [Previous Page] WILL TAKE YOU TO QUESTIONS BEFORE THIS SERIES.

RU Member

[1. First Name,[Middle Name],Last Name-65] [Status-25]
[2. First Name,[Middle Name],Last Name-65] [Status-25]
[3. First Name,[Middle Name],Last Name-65] [Status-25]
ROSTER DETAILS:
| COL # 1 HEADER: RU MEMBER |
| INSTRUCTIONS: DISPLAY RU MEMBER’S FIRST, MIDDLE, AND LAST NAMES (PERS.FULLNAME) |
| COL # 2 HEADER: EMPTY |
| INSTRUCTIONS: DISPLAY THE MOST CURRENT NAVIGATOR STATUS FOR EACH RU MEMBER EACH TIME THE NAVIGATOR IS PRESENTED |

ROSTER DEFINITION:
| THIS ITEM DISPLAYS RU-MEMBERS-ROSTER FOR SELECTION. |

ROSTER BEHAVIOR:
| 1. SELECT ALLOWED. |
| 2. MULTIPLE SELECT, ADD, DELETE, AND EDIT DISALLOWED. |

ROSTER FILTER:
| DISPLAY ALL RU MEMBERS RU-MEMBERS-ROSTER WHO MEET THE FOLLOWING CONDITIONS: |
| - PERSON IS A CURRENT RU MEMBER (INCLUDES DECEASED AND INSTITUTIONALIZED RU MEMBERS) |
| - PERSON RECEIVED CHILD SUPPORT IN CALENDAR YEAR (SELECTED AT IN47) |

CONTINUE WITH IN48A FOR SELECTED RU MEMBER.
IN48A

{PERSON'S FIRST MIDDLE AND LAST NAME}

For how many months in {YEAR} did (PERSON) receive money from child support?

[Enter Number of Months] ............... {IN48B}
REF .................................... -7 {IN48B}
DK ..................................... -8 {IN48B}

IN48B

{PERSON'S FIRST MIDDLE AND LAST NAME}

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

[Enter $ Amount] ......................... {END_LP06}
REF .................................... -7 {END_LP06}
DK ..................................... -8 {IN48C}
| SOFT CHECK:                                       |
| SOFT RANGE CHECK:  0-100,000                      |

IN48C
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

SHOW CARD IN-2.

Which of the ranges on this card is the best estimate of how much money was received per month [from child support in {YEAR}]?

1 - 250 ................................. 1 {END_LP06}
251 - 500 ............................... 2 {END_LP06}
501 - 750 ............................... 3 {END_LP06}
751 - 1,000 ............................. 4 {END_LP06}
1,001 OR MORE ........................... 5 {END_LP06}
REF .................................... -7 {END_LP06}
DK ..................................... -8 {END_LP06}

[Code One]

| (FOR SPECIFICATIONS PURPOSES ONLY; CAPI HANDLES |
| AUTOMATICALLY:) IF ROUND 3, DISPLAY FIRST CALENDAR|
| YEAR OF PANEL FOR {YEAR}. IF ROUND 5, DISPLAY |
| SECOND CALENDAR YEAR OF PANEL FOR {YEAR}.         |

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             |
Not counting military retirement, during {YEAR}, 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}

HELP AVAILABLE FOR DEFINITION OF VETERAN’S PAYMENTS.

----------------------------------------------------
| (FOR SPECIFICATIONS PURPOSES ONLY; CAPI HANDLES | |
| AUTOMATICALLY:) IF ROUND 3, DISPLAY FIRST CALENDAR| |
| YEAR OF PANEL FOR {YEAR}. IF ROUND 5, DISPLAY   | |
| SECOND CALENDAR YEAR OF PANEL FOR {YEAR}.       | |
----------------------------------------------------

| IF CODED ‘1’ (YES) AND A SINGLE PERSON RU,     |
| AUTOMATICALLY CODE PERSON AS ‘RECEIVED VETERAN’S|
| PAYMENTS’ AT IN50 AND GO TO LOOP_07            |
----------------------------------------------------

| IF CODED ‘1’ (YES) AND A MULTI-PERSON RU,      |
| CONTINUE WITH IN50                            |
----------------------------------------------------

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

PROBE: Anyone else receive veteran’s payments in {YEAR}?

[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 SPECIFICATIONS PURPOSES ONLY; CAPI HANDLES AUTOMATICALLY:) IF ROUND 3, DISPLAY FIRST CALENDAR YEAR OF PANEL FOR {YEAR}. IF ROUND 5, DISPLAY SECOND CALENDAR YEAR OF PANEL FOR {YEAR}.

CONTINUE WITH LOOP_07

ROSTER DETAILS:
TITLE: RU_MEMBERS_1

COL # 1 HEADER: NAME
INSTRUCTIONS: DISPLAY RU MEMBER’S FIRST, MIDDLE, AND LAST NAMES (PERS.FULLNAME)

ROSTER DEFINITION:
THIS ITEM DISPLAYS RU-MEMBERS-ROSTER FOR SELECTION.

ROSTER BEHAVIOR:
1. MULTIPLE SELECT ALLOWED.
2. ADD, DELETE, AND EDIT DISALLOWED.

ROSTER FILTER:
DISPLAY ALL RU MEMBERS WHO MEET THE FOLLOWING CONDITION:
- PERSON IS A CURRENT RU MEMBER (INCLUDES DECEASED AND INSTITUTIONALIZED RU MEMBERS)
LOOP_07
=======

-----------------------------------------------
| FOR EACH ELEMENT IN THE RU-MEMBERS-ROSTER,   |
| ASK NAV_IN07 - END_LP07                     |
-----------------------------------------------

-----------------------------------------------
| LOOP DEFINITION: LOOP_07 DETERMINES HOW MUCH |
| MONEY WAS RECEIVED FROM VETERAN’S PAYMENTS FOR |
| MEMBERS WHO RECEIVED VETERAN’S PAYMENTS IN THE |
| CALENDAR YEAR. THIS LOOP CYCLES ON EACH PERSON ON |
| THE RU-MEMBERS-ROSTER WHO MEETS THE FOLLOWING |
| CONDITIONS:                                    |
|                                                |
| - PERSON IS A CURRENT RU MEMBER (INCLUDES DECEASED | |
| AND INSTITUTIONALIZED RU MEMBERS)              |
| - PERSON RECEIVED VETERAN’S PAYMENTS IN THE    |
| CALENDAR YEAR (SELECTED AT IN50)               |
-----------------------------------------------

-----------------------------------------------
| NAVIGATOR DETAILS: LOOP_07 USES NAV_IN07 TO   |
| CONTROL THE FLOW OF THE LOOP.                 |
-----------------------------------------------

NAV_IN07
=======

SERIES: Amount Received from Veteran’s Payments

USE THE LINKS BELOW TO COMPLETE ALL QUESTIONS WITHIN THIS SERIES.

WHEN ALL LINKS ARE MARKED “DONE,” USE [Continue Interview] TO GO PAST THIS SERIES.

IF NEEDED, [Previous Page] WILL TAKE YOU TO QUESTIONS BEFORE THIS SERIES.

RU Member

[1. First Name,[Middle Name],Last Name-65] [Status-25]
[2. First Name,[Middle Name],Last Name-65] [Status-25]
[3. First Name,[Middle Name],Last Name-65] [Status-25]
ROSTER DETAILS:

COL # 1 HEADER: RU MEMBER
INSTRUCTIONS: DISPLAY RU MEMBER’S FIRST, MIDDLE, AND LAST NAMES (PERS.FULLNAME)

COL # 2 HEADER: EMPTY
INSTRUCTIONS: DISPLAY THE MOST CURRENT NAVIGATOR STATUS FOR EACH RU MEMBER EACH TIME THE NAVIGATOR IS PRESENTED

ROSTER DEFINITION:
THIS ITEM DISPLAYS RU-MEMBERS-ROSTER FOR SELECTION.

ROSTER BEHAVIOR:
1. SELECT ALLOWED.

2. MULTIPLE SELECT, ADD, DELETE, AND EDIT DISALLOWED.

ROSTER FILTER:
DISPLAY ALL RU MEMBERS RU-MEMBERS-ROSTER WHO MEET THE FOLLOWING CONDITIONS:
- PERSON IS A CURRENT RU MEMBER (INCLUDES DECEASED AND INSTITUTIONALIZED RU MEMBERS)
- PERSON RECEIVED VETERAN’S PAYMENTS IN THE CALENDAR YEAR (SELECTED AT IN50)

CONTINUE WITH IN51 FOR SELECTED RU MEMBER.
How much money did (PERSON) receive from veteran’s payments such as education or disability benefits in (YEAR)?  [Do not include military retirement.]

[Enter $ Amount] .......................  {END_LP07}
REF .................................... -7 {END_LP07}
DK ..................................... -8 {IN51A}

---
| (FOR SPECIFICATIONS PURPOSES ONLY; CAPI HANDLES AUTOMATICALLY:) IF ROUND 3, DISPLAY FIRST CALENDAR YEAR OF PANEL FOR (YEAR). IF ROUND 5, DISPLAY SECOND CALENDAR YEAR OF PANEL FOR (YEAR). |
---

---
| BEGINNING IN PANEL 12, PRE-FILL CENTS DIGITS WITH ‘00’ SO THAT FIELD ACCEPTS WHOLE DOLLAR AMOUNT ONLY. |
---

---
| SOFT CHECK: |
| SOFT RANGE CHECK: 0-100,000 |
---
IN51A
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

SHOW CARD IN-1A.

Which of the ranges on this card is the best estimate of how much money was received [from veteran’s payments such as education or disability benefits in (YEAR)]?

1 - 100 ..................................... 1 {END_LP07}
101 - 500 .................................. 2 {END_LP07}
501 - 1,000 ................................ 3 {END_LP07}
1,001 - 5,000 ............................ 4 {END_LP07}
5,001 - 15,000 ............................ 5 {END_LP07}
15,001 OR MORE ........................... 6 {END_LP07}
REF ..................................... -7 {END_LP07}
DK ..................................... -8 {END_LP07}

[Code One]

---------------------------------------------------------------------
| (FOR SPECIFICATIONS PURPOSES ONLY; CAPI HANDLES AUTOMATICALLY:) IF |
| ROUND 3, DISPLAY FIRST CALENDAR YEAR OF PANEL FOR (YEAR). IF ROUND 5, |
| DISPLAY SECOND CALENDAR YEAR OF PANEL FOR (YEAR). |
---------------------------------------------------------------------

END_LP07
=====

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

---------------------------------------------------------------------
| IF NO OTHER PERSONS MEET THE STATED CONDITIONS, |
| END LOOP_07 AND CONTINUE WITH IN52 |
---------------------------------------------------------------------
Besides what we have already talked about, during {YEAR}, did anyone 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}

HELP AVAILABLE FOR DESCRIPTION OF REGULAR CASH CONTRIBUTIONS AND HOUSEHOLD.
IN53
====

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

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

[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 SPECIFICATIONS PURPOSES ONLY; CAPI HANDLES AUTOMATICALLY:) IF ROUND 3, DISPLAY FIRST CALENDAR YEAR OF PANEL FOR {YEAR}. IF ROUND 5, DISPLAY SECOND CALENDAR YEAR OF PANEL FOR {YEAR}. |
-------------------------------------------------------------------------------------------------------------------------------

-------------------------------------------------------------------------------------------------------------------------------
| CONTINUE WITH LOOP_08 |
-------------------------------------------------------------------------------------------------------------------------------

-------------------------------------------------------------------------------------------------------------------------------
| ROSTER DETAILS: |
| TITLE: RU_MEMBERS_1 |

| COL #1 HEADER: NAME |
| INSTRUCTIONS: DISPLAY RU MEMBER’S FIRST, MIDDLE, AND LAST NAMES (PERS.FULLNAME) |
-------------------------------------------------------------------------------------------------------------------------------

-------------------------------------------------------------------------------------------------------------------------------
| ROSTER DEFINITION: |
| DISPLAY THE RU-MEMBERS-ROSTER FOR SELECTION. |
-------------------------------------------------------------------------------------------------------------------------------

-------------------------------------------------------------------------------------------------------------------------------
| ROSTER BEHAVIOR: |
| 1. MULTIPLE SELECT ALLOWED. |
| 2. ADD, EDIT, AND DELETE DISALLOWED. |
-------------------------------------------------------------------------------------------------------------------------------
MEPS P15R5/P16R3/P17R1 Income (IN) Section
November 3, 2011

--- ROSTER FILTER: DISPLAY ALL CURRENT RU MEMBERS (INCLUDING PERSONS WHO ARE DECEASED AND INSTITUTIONALIZED THIS ROUND WHO ARE CURRENT ROUND 3 MEMBERS. ---

LOOP_08

--- FOR EACH ELEMENT IN THE RU-MEMBERS-ROSTER, ASK NAV_IN08 - 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 THE CALENDAR YEAR. THIS LOOP CYCLES ON EACH PERSON ON THE RU-MEMBERS-ROSTER WHO MEETS THE FOLLOWING CONDITIONS:

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

--- NAVIGATOR DETAILS: LOOP_08 USES NAV_IN08 TO CONTROL THE FLOW OF THE LOOP. ---
SERIES: Regular Cash Contributions – Number of Months Received and Amount Received Monthly

USE THE LINKS BELOW TO COMPLETE ALL QUESTIONS WITHIN THIS SERIES.

WHEN ALL LINKS ARE MARKED “DONE,” USE [Continue Interview] TO GO PAST THIS SERIES.

IF NEEDED, [Previous Page] WILL TAKE YOU TO QUESTIONS BEFORE THIS SERIES.

---

| ROSTER DETAILS: |
| COL # 1 HEADER: RU MEMBER |
| INSTRUCTIONS: DISPLAY RU MEMBER’S FIRST, MIDDLE, AND LAST NAMES (PERS.FULLNAME) |
| COL # 2 HEADER: EMPTY |
| INSTRUCTIONS: DISPLAY THE MOST CURRENT NAVIGATOR STATUS FOR EACH RU MEMBER EACH TIME THE NAVIGATOR IS PRESENTED |

---

| ROSTER DEFINITION: |
| THIS ITEM DISPLAYS RU-MEMBERS-ROSTER FOR SELECTION. |

---

| ROSTER BEHAVIOR: |
| 1. SELECT ALLOWED. |
| 2. MULTIPLE SELECT, ADD, DELETE, AND EDIT DISALLOWED. |
---
| ROSTER FILTER:                                    |
| DISPLAY ALL RU MEMBERS RU-MEMBERS-ROSTER WHO     |
| MEET THE FOLLOWING CONDITIONS:                   |
| - PERSON IS A CURRENT RU MEMBER (INCLUDES DECEASED|
| AND INSTITUTIONALIZED RU MEMBERS)               |
| - PERSON RECEIVED REGULAR CASH CONTRIBUTIONS     |
| FROM SOMEONE OUTSIDE OF THE HOUSEHOLD IN THE     |
| CALENDAR YEAR (SELECTED AT IN53)                 |
---

---
| CONTINUE WITH IN54A FOR SELECTED RU MEMBER.      |
---

IN54A
=====

{PERSON'S FIRST MIDDLE AND LAST NAME}

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

[Enter Number of Months] ...............  {IN54B}
REF .................................... -7 {IN54B}
DK ..................................... -8 {IN54B}

---
| (FOR SPECIFICATIONS PURPOSES ONLY; CAPI HANDLES |
| AUTOMATICALLY:) IF ROUND 3, DISPLAY FIRST CALENDAR|
| YEAR OF PANEL FOR {YEAR}. IF ROUND 5, DISPLAY    |
| SECOND CALENDAR YEAR OF PANEL FOR {YEAR}.        |
---

---
| HARD CHECK:                                    |
| RANGE CHECK:  1-12                            |
---

{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 {YEAR}]?

[Enter $ Amount] ....................... {END_LP08}
REF ..................................... -7 {END_LP08}
DK ..................................... -8 {IN54C}
{PERSON'S FIRST MIDDLE AND LAST NAME}

SHOW CARD IN-2.

Which of the ranges on this card is the best estimate of how much money was received per month [from regular cash contributions from people who do not live in this household, in \{YEAR\}]?

<table>
<thead>
<tr>
<th>Range</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 - 250</td>
<td>1</td>
</tr>
<tr>
<td>251 - 500</td>
<td>2</td>
</tr>
<tr>
<td>501 - 750</td>
<td>3</td>
</tr>
<tr>
<td>751 - 1,000</td>
<td>4</td>
</tr>
<tr>
<td>1,001 OR MORE</td>
<td>5</td>
</tr>
<tr>
<td>REF</td>
<td>-7</td>
</tr>
<tr>
<td>DK</td>
<td>-8</td>
</tr>
</tbody>
</table>

[Code One]

---

END_LP08

---

Cyclo 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.

---
MEPS P15R5/P16R3/P17R1 Income (IN) Section
November 3, 2011

IN55
====

During {YEAR}, did anyone in the family get benefits from the Supplemental Nutrition Assistance Program, also known as SNAP {or (STATE SNAP NAME)}, or food stamps?

YES .................................... 1 {IN56}
NO ..................................... 2 {IN59}
REF ................................... -7 {IN59}
DK .................................... -8 {IN59}

HELP AVAILABLE FOR DEFINITION OF SNAP.

| DISPLAY 'or {STATE SNAP NAME}' (SUBSTITUTING THE REAL STATE NAME FOR THE SNAP PROGRAM) IF THE STATE IN WHICH INTERVIEW IS BEING CONDUCTED DOES NOT USE THE NAME 'SNAP.' FOR THE SPECIFIC NAME TO USE BY STATE, SEE ATTACHMENT 37. |

| (FOR SPECIFICATIONS PURPOSES ONLY; CAPI HANDLES AUTOMATICALLY:) IF ROUND 3, DISPLAY FIRST CALENDAR YEAR OF PANEL FOR {YEAR}. IF ROUND 5, DISPLAY SECOND CALENDAR YEAR OF PANEL FOR {YEAR}. |

IN56
====

For how many months in {YEAR} were SNAP or other food stamp benefits received?

[Enter Months] ......................... {IN58}
REF ................................... -7 {IN58}
DK .................................... -8 {IN58}

| (FOR SPECIFICATIONS PURPOSES ONLY; CAPI HANDLES AUTOMATICALLY:) IF ROUND 3, DISPLAY FIRST CALENDAR YEAR OF PANEL FOR {YEAR}. IF ROUND 5, DISPLAY SECOND CALENDAR YEAR OF PANEL FOR {YEAR}. |
IN58

What was the approximate monthly value of the SNAP or other food stamp benefits?

[Enter $ Amount] ........................ {IN59}
REF ................................. -7 {IN59}
DK ................................. -8 {IN59}

| BEGINNING IN PANEL 12, PRE-FILL CENTS DIGITS |
| WITH ‘00’ SO THAT FIELD ACCEPTS WHOLE DOLLAR |
| AMOUNT ONLY. |

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

OMITTED.
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 {LOOP_09}
NO ..................................... 2 {BOX_04}
REF ................................... -7 {BOX_04}
DK .................................... -8 {BOX_04}

HELP AVAILABLE FOR DEFINITIONS OF SHOW CARD CATEGORIES.

---

FOR EACH OF THE FOLLOWING:

OTHER INCOME SOURCE CATEGORY 1
OTHER INCOME SOURCE CATEGORY 2
OTHER INCOME SOURCE CATEGORY 3
OTHER INCOME SOURCE CATEGORY 4
OTHER INCOME SOURCE CATEGORY 5

ASK IN60 - END_LP09

---

LOOP DEFINITION: LOOP_09 COLLECTS INFORMATION ABOUT OTHER SOURCES OF TAXABLE INCOME. THIS LOOP CYCLES ON SOURCES OF TAXABLE INCOME LISTED AT IN60. THE FIRST CYCLE OF THIS LOOP COLLECTS THE 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.

NAVIGATOR DETAILS: LOOP_09 USES NAV_IN09 TO CONTROL THE FLOW OF THE LOOP AND THE SOURCES SELECTED AT IN60.
SHOW CARD IN-3.

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

WAGES AND SALARY ...................... 1 {NAV_IN09}
FARM INCOME (OR LOSS) ................. 2 {NAV_IN09}
BUSINESS INCOME (OR LOSS) .......... 3 {NAV_IN09}
SOCIAL SECURITY/RAILROAD RETIREMENT .. 4 {NAV_IN09}
PRIVATE, MILITARY, OR GOVERNMENT PENSIONS ......................... 5 {NAV_IN09}
INTEREST ................................ 6 {NAV_IN09}
DIVIDENDS ................................ 7 {NAV_IN09}
RENTAL INCOME (OR LOSS) ............. 8 {NAV_IN09}
OTHER SOURCE .......................... 91 {IN60OV}
REF .................................... -7 {NAV_IN09}
DK ..................................... -8 {NAV_IN09}

[Code One]

HELP AVAILABLE FOR DEFINITIONS OF ANSWER CATEGORIES.

ENTER OTHER INCOME SOURCE:

[Other Specify] .......................... {NAV_IN09}
REF .................................... -7 {NAV_IN09}
DK ..................................... -8 {NAV_IN09}

HELP AVAILABLE FOR DEFINITIONS OF ANSWER CATEGORIES.
NAV_IN09
======

{STR-DT}

SERIES: Additional Sources of Income and Amount

USE THE LINKS BELOW TO COMPLETE ALL QUESTIONS WITHIN THIS SERIES.

WHEN ALL LINKS ARE MARKED “DONE,” USE [Continue Interview] TO GO PAST THIS SERIES.

IF NEEDED, [Previous Page] WILL TAKE YOU TO QUESTIONS BEFORE THIS SERIES.

**Income Source**

| 1. Income Source Selected at IN60 | [Status-25] |
| 2. Income Source Selected at IN60 | [Status-25] |
| 3. Income Source Selected at IN60 | [Status-25] |

---

**ROSTER DETAILS:**
- COL # 1 HEADER: INCOME SOURCE
- INSTRUCTIONS: DISPLAY THE INCOME SOURCE CATEGORY SELECTED AT IN60 FOR THIS CYCLE OF THE LOOP.
- COL # 2 HEADER: EMPTY
- INSTRUCTIONS: DISPLAY THE MOST CURRENT NAVIGATOR STATUS FOR EACH RU MEMBER EACH TIME THE NAVIGATOR IS PRESENTED

---

**ROSTER DEFINITION:**
- DISPLAY ALL INCOME SOURCES SELECTED AT IN60.

---

**ROSTER BEHAVIOR:**
- 1. SELECT ALLOWED.
- 2. MULTIPLE SELECT, ADD, DELETE, AND EDIT DISALLOWED.

---

**ROSTER FILTER:**
- DISPLAY ALL INCOME SOURCES SELECTED AT IN60.
CONTINUE WITH BOX 03B FOR SELECTED INCOME SOURCE.

-- BOX 03B --

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

-- IN61 --

{CATEGORY SELECTED AT IN60}

Who received income from (INCOME SOURCE) in (YEAR)?

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

[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 'DISPLAY CATEGORY SELECTED AT IN60.....', DISPLAY THE RESPONSE CATEGORY NAME SELECTED AT IN60 DURING THE CURRENT LOOP.

(FOR SPECIFICATIONS PURPOSES ONLY; CAPI HANDLES AUTOMATICALLY:) IF ROUND 3, DISPLAY FIRST CALENDAR YEAR OF PANEL FOR (YEAR). IF ROUND 5, DISPLAY SECOND CALENDAR YEAR OF PANEL FOR (YEAR).

CONTINUE WITH IN62
ROSTER DETAILS:
TITLE: RU_MEMBERS_1

COL # 1 HEADER: NAME
INSTRUCTIONS: DISPLAY RU MEMBER’S FIRST, MIDDLE, AND LAST NAMES (PERS.FULLNAME)

ROSTER DEFINITION:
THIS ITEM DISPLAYS RU-MEMBERS-ROSTER FOR SELECTION.

ROSTER BEHAVIOR:
1. MULTIPLE SELECT ALLOWED.
2. ADD, DELETE, AND EDIT DISALLOWED.

ROSTER FILTER:
DISPLAY ALL RU MEMBERS WHO MEET THE FOLLOWING CONDITION:
- PERSON IS A CURRENT RU MEMBER (INCLUDES DECEASED AND INSTITUTIONALIZED RU MEMBERS)

IN62
====

(CATEGORY SELECTED AT IN60)

What is the total amount received from (INCOME SOURCE), in [YEAR], for (all of the people just mentioned/(PERSON))?  
[Enter $ Amount]  .......................  {BOX_IN62}
REF  ................................. -7 {IN63}
DK  ................................. -8 {IN62A}

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

---
DISPLAY ‘all of the people just mentioned’ IF A MULTI-PERSON RU. OTHERWISE (I.E., SINGLE-PERSON RU), DISPLAY ‘(PERSON)’.

(FOR SPECIFICATIONS PURPOSES ONLY; CAPI HANDLES AUTOMATICALLY:) IF ROUND 3, DISPLAY FIRST CALENDAR YEAR OF PANEL FOR {YEAR}. IF ROUND 5, DISPLAY SECOND CALENDAR YEAR OF PANEL FOR {YEAR}.

BEGINNING IN PANEL 12, PRE-FILL CENTS DIGITS WITH ‘00’ SO THAT FIELD ACCEPTS WHOLE DOLLAR AMOUNT ONLY.

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

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

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

[Code One]

INCOME SOURCE: {CATEGORY SELECTED AT IN60}

SHOW CARD IN-1A.

Which of the ranges on this card is the best estimate of how much money was received [from (INCOME SOURCE) in (YEAR)]?

1 - 100 ........................................... 1 {BOX_IN62A}
101 - 500 ...................................... 2 {BOX_IN62A}
501 - 1,000 ..................................... 3 {BOX_IN62A}
1,001 - 5,000 .................................. 4 {BOX_IN62A}
5,001 - 15,000 ............................... 5 {BOX_IN62A}
15,001 OR MORE ................................ 6 {BOX_IN62A}
REF .............................................-7 {BOX_IN62A}
DK .............................................-8 {BOX_IN62A}

[Code One]

-------------
| (FOR SPECIFICATIONS PURPOSES ONLY; CAPI HANDLES | |
| AUTOMATICALLY:) IF ROUND 3, DISPLAY FIRST CALENDAR| |
| YEAR OF PANEL FOR (YEAR). IF ROUND 5, DISPLAY    | |
| SECOND CALENDAR YEAR OF PANEL FOR (YEAR).        | |
-------------
BOX_IN62A

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

-----------------------------------
| OTHERWISE, GO TO IN63 |
-----------------------------------

IN62AOV

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

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

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

[Code One]

IN63

SHOW CARD IN-3.

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

YES ............................... 1 {END_LP09}
NO ............................... 2 {END_LP09}
REF ............................... -7 {END_LP09}
DK ............................... -8 {END_LP09}

HELP AVAILABLE FOR DEFINITIONS OF SHOW CARD CATEGORIES.
END_LP09
=======

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

-------------------------------------------------------------------------------
| OTHERWISE END LOOP_09, AND CONTINUE WITH BOX_04                          |
-------------------------------------------------------------------------------

BOX_04
======

-------------------------------------------------------------------------------
| GO TO NEXT QUESTIONNAIRE SECTION                                         |
-------------------------------------------------------------------------------

IN64
====

OMITTED.