

2002 CONSUMER EXPENDITURE INTERVIEW SURVEY
PUBLIC USE MICRODATA
DOCUMENTATION

December 19, 2003

U.S. Department of Labor
Bureau of Labor Statistics
Division of Consumer Expenditure Surveys

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I. INTRODUCTION

The Consumer Expenditure Survey (CE) program provides a continuous and comprehensive flow of data on the buying habits of American consumers. These data are used widely in economic research and analysis, and in support of revisions of the Consumer Price Index. To meet the needs of users, the Bureau of Labor Statistics (BLS) produces population estimates for consumer units (CUs) of average expenditures in news releases, reports, issues, and articles in the Monthly Labor Review. Tabulated CE data are also available on the Internet and by facsimile transmission (See Section XVI. APPENDIX 5). The microdata are available on CD-ROMs.

These microdata files present detailed expenditure and income data from the Interview component of the CE for 2002 and the first quarter of 2003. The Interview survey collects data on up to 95 percent of total household expenditures. In addition to the FMLY, MEMB, MTAB, and ITAB files, the microdata include files created directly from the expenditure sections of the Interview survey (EXPN files). The EXPN files contain expenditure data and ancillary descriptive information, often not available on the FMLY or MTAB files, in a format similar to the Interview questionnaire. In addition to the extra information available on the EXPN files, users can identify distinct spending categories easily and reduce processing time due to the organization of the files by type of expenditure.

Estimates of average expenditures in 2002 from the Interview Survey, integrated with data from the Diary Survey, will be published in the report *Consumer Expenditures in 2002* (due out in 2004). A list of recent publications containing data from the CE appears at the end of this documentation.

The microdata files are in the public domain and, with appropriate credit, may be reproduced without permission. A suggested citation is: "U.S. Department of Labor, Bureau of Labor Statistics, Consumer Expenditure Survey, Interview Survey, 2002."

II. CHANGES FROM THE 2001 MICRODATA FILES

A. FMLY File

1. Variable Additions

Beginning in 2002Q1, the FMLY file will contain the following new variables.

| Variable name | Variable Description | Start Position | Format |
|---------------|---|----------------|--------|
| CUID | Consumer unit identifying variable, constructed using the first seven digits of NEWID | 4776 | NUM(7) |
| INTERI | Interview number; it is the last digit of NEWID | 4783 | NUM(1) |

2. Variable content changes

Beginning in 2002Q1, changes made to the following variables become applicable.

| Variable name | New codes/definitions/descriptions |
|---------------|------------------------------------|
| DMSXCCPQ | UCC 340915 is added |

| Variable name | New codes/definitions/descriptions |
|---------------|------------------------------------|
| DMSXCCCQ | UCC 340915 is added. |
| OTHHEXPQ | UCC 340915 is deleted. |
| OTHHEXCQ | UCC 340915 is deleted. |

The following changes are due to a change in the mapping scheme. "Personal property tax for vehicles" data is being mapped to (old) ITAB UCC 950022 (personal property taxes); other personal property tax data formerly in UCC 950022 are now added in with UCC 950021 (other taxes).

| Variable name | New codes/definitions/descriptions |
|---------------|--|
| TAXPROPX | Definition change: During the past 12 months, what was the total amount PAID for personal property taxes for vehicles by ALL CU members? |
| MISCTAXX | Definition change: During the past 12 months, what was the total amount PAID for personal property taxes and other taxes not reported elsewhere by ALL CU members? |

B. MEMB File

There were no changes to the MEMB file.

C. MTAB File

PUBFLAG changes

Beginning in 2002Q1, the following changes become applicable.

| UCC | PUBFLAG |
|--------|---------|
| 800111 | 2 |
| 800121 | 2 |

D. ITAB File

There were no changes to the ITAB file.

For clarification, ITAB UCC 950022 (personal property taxes) now collects only personal property tax for vehicles data; other personal property tax data formerly in UCC 950022 are now added in with UCC 950021 (other taxes).

E. EXPN Files

FRB file

Variable deletions

Beginning in 2002Q1, the following variables will no longer be recorded. The positions for these deleted variables will be left blank.

| Variable name | Variable Description | Start Position | Format |
|---------------|---|----------------|---------|
| FURNRNTX | What was the total expense for renting or leasing furniture (last 3+ months) S08B 1b | 21 | NUM(6) |
| FURN_NTX | FURNRNTX flag variable | 27 | CHAR(1) |

III. FILE INFORMATION

The microdata on CD-ROM are provided as SAS data sets or ASCII text files. The 2002 Interview release contains four groups of Interview data files (FMLY, MEMB, MTAB, and ITAB), 50 EXPN files, and five processing files. The FMLY, MEMB, MTAB, and ITAB files are organized by the calendar quarter of the year in which the data were collected. (See Section V.A.1.b. CALENDAR PERIOD VERSUS COLLECTION PERIOD for a description of calendar and collection years.) There are five quarterly data sets for each of these files, running from the first quarter of 2002 through the first quarter of 2003. The FMLY files contain CU characteristics, income, and summary level expenditures; the MEMB files contain member characteristics and income data; the MTAB files contain expenditures organized on a monthly basis at the UCC level; and the ITAB files contain income data converted to a monthly time frame and assigned to UCCs. Each of the 50 EXPN files contains five quarters of data. The EXPN files contain data directly derived from their respective questionnaire sections.

The five processing files enhance computer processing and tabulation of data, and provide descriptive information on item codes. The five processing files are: a sample table aggregation file (AGGI), a sample table label file (LABELI), a Universal Classification Codes file (UCCI), a vehicle make and model file (VEHI), and a file (SAMPLI) containing the sample program (See Section VII. A. SAMPLE PROGRAM). The processing files are further explained in Section III.F.6. PROCESSING FILES.

Since space in this documentation prohibits the explanation of all information in the EXPN files, we strongly suggest the user refer to the questionnaire. A list of the 50 EXPN file names and the sections of the questionnaire to which they relate follows.

| | |
|------------------------------|---|
| APL Section 1, Part C | General Survey Information – Major Household Appliances |
| RNT Section 2, Parts A and B | Rented Living Quarters – CU Tenure, Rental Payments, Facilities, and Services for Sample Unit and Other Units |
| OPB Section 3, Part B | Owned Living Quarters and Other Owned Real Estate – Detailed Property Description |
| OPD Section 3, Part D | Owned Living Quarters and Other Owned Real Estate – Disposed of Property |
| MOR Section 3, Part F | Owned Living Quarters and Other Owned Real Estate – Mortgages |

| | |
|--------------------------|---|
| HEL Section 3, Part G | Owned Living Quarters and Other Owned Real Estate – Lump Sum Home Equity Loans |
| OPH Section 3, Part H | Owned Living Quarters and Other Owned Real Estate – Line of Credit Home Equity Loans |
| OPI Section 3, Part I | Owned Living Quarters and Other Owned Real Estate – Ownership Costs |
| UTA Section 4, Part A | Utilities and Fuels for Owned and Rented Properties – Telephone Expenses |
| UTP Section 4, Part B | Utilities and Fuels for Owned and Rented Properties – Additional Telephone Expenses |
| UTB Section 4, Part C | Utilities and Fuels for Owned and Rented Properties – Screening Questions |
| UTC Section 4, Part D | Utilities and Fuels for Owned and Rented Properties – Detailed Questions |
| CRA Section 5, Part A | Construction, Repairs, Alterations, and Maintenance of Owned and Rented Property – Screening Questions |
| CRB Section 5, Part B | Construction, Repairs, Alterations, and Maintenance of Owned and Rented Property – Job Description |
| APA Section 6, Part A | Appliances, Household Equipment, and Other Selected Items – Purchase of Household Appliances |
| APB Section 6, Part B | Appliances, Household Equipment and Other Selected Items – Purchase of Household Appliances and Other Selected Items |
| EQB Section 7, Part B | Household Equipment Repairs, Service Contracts, and Furniture Repair and Reupholstering – Household Equipment Repairs and Service Contracts |
| FRA Section 8, Part A | Home Furnishings and Related Household Items – Purchases |
| FRB Section 8, Part B | Home Furnishings and Related Household Items – Rental, Leasing, or Repair of Furniture |
| CLA Section 9, Part A | Clothing and Sewing Materials – Clothing |
| CLB Section 9, Part B | Clothing and Sewing Materials – Infants Clothing, Watches, Jewelry, and Hairpieces |
| CLC Section 9, Part C | Clothing and Sewing Materials – Sewing Materials |
| CLD Section 9, Part D | Clothing and Sewing Materials – Clothing Services |
| RTV Section 10, Part A.1 | Rented and Leased Vehicles – Screening Questions |
| LSD Section 10, Part B | Rented and Leased Vehicles – Detailed Questions for Leased Vehicles |
| OVB Section 11, Part B | Owned Vehicles – Detailed Questions |
| OVC Section 11, Part C | Owned Vehicles – Disposal of Vehicles |
| VEQ Section 12, Part A | Vehicle Operating Expenses – Vehicle Maintenance and Repair, Parts, and Equipment |

| | |
|-------------------------------|--|
| VLR Section 12, Part B | Vehicle Operating Expenses – Licensing, Registration, and Inspection of Vehicles |
| VOT Section 12, Part C | Vehicle Operating Expenses – Other Vehicle Operating Expenses |
| INB Section 13, Part B | Insurance Other Than Health – Detailed Questions |
| IHB Section 14, Part B | Hospitalization and Health Insurance – Detailed Questions |
| IHC Section 14, Part C | Hospitalization and Health Insurance – Medicare, Medicaid and Other Health Insurance Plans Not Directly Paid For By The CU |
| MDB Section 15, Part B | Medical and Health Expenditures – Payments For Medical Expenses |
| MDC Section 15, Part C | Medical and Health Expenditures – Reimbursements For Medical Expenses |
| EDA Section 16 | Educational Expenses |
| SUB Section 17, Part A | Subscriptions, Memberships, Books, and Entertainment Expenses – Subscriptions and Memberships |
| ENT Section 17, Part B | Subscriptions, Memberships, Books, and Entertainment Expenses – Books and Entertainment Expenses |
| TRV Section 18, Parts B and C | Trips and Vacations – Trips Paid Entirely by CU and Partially Reimbursed Trips |
| TRD Section 18, Part D | Trips and Vacations – 100% Reimbursed Trips |
| TRE Section 18, Part E | Trips and Vacations – Trip Expenses for Non-CU Members |
| TRF Section 18, Part F | Trips and Vacations – Local Overnight Stays |
| MIS Section 19, Part A | Miscellaneous Expenses |
| CNT Section 19, Part B | Miscellaneous Expenses – Contributions |
| XPA Section 20, Part A | Expense Patterns For Food, Beverages, and Other Selected Items – Food and Beverages |
| XPB Section 20, Part B | Expense Patterns For Food, Beverages, and Other Selected Items – Selected Services and Goods |
| FN2 Section 21, Part A.1 | Credit Liability – Credit Balances – Second Quarter Only |
| FNA Section 21, Part A.2 | Credit Liability – Credit Balances – Fifth Quarter Only |
| FNB Section 21, Part B | Credit Liability – Finance Charges – Fifth Quarter Only |

Note that the variable NEWID, the CU's identification number, is the common variable among files by which matching is done.

A. DATA SET NAMES

The file naming convention on the ASCII CD-ROM is as follows.
("X" references the designated drive letter for your CD.)

X:\INTRVW02\FMLYI021x.TXT (Interview FMLY file for first quarter, 2002)
X:\INTRVW02\MEMBI021x.TXT (Interview MEMB file for first quarter, 2002)
X:\INTRVW02\MTABI021x.TXT (Interview MTAB file for first quarter, 2002)
X:\INTRVW02\ITABI021x.TXT (Interview ITAB file for first quarter, 2002)
X:\INTRVW02\FMLYI022.TXT (etc.)
X:\INTRVW02\MEMBI022.TXT
X:\INTRVW02\MTABI022.TXT
X:\INTRVW02\ITABI022.TXT
X:\INTRVW02\FMLYI023.TXT
X:\INTRVW02\MEMBI023.TXT
X:\INTRVW02\MTABI023.TXT
X:\INTRVW02\ITABI023.TXT
X:\INTRVW02\FMLYI024.TXT
X:\INTRVW02\MEMBI024.TXT
X:\INTRVW02\MTABI024.TXT
X:\INTRVW02\ITABI024.TXT
X:\INTRVW02\FMLYI031.TXT
X:\INTRVW02\MEMBI031.TXT
X:\INTRVW02\MTABI031.TXT
X:\INTRVW02\ITABI031.TXT
X:\INTRVW02\UCCI02.TXT
X:\INTRVW02\VEHI02.TXT
X:\EXPNO2\APL02.TXT
X:\EXPNO2\RNT02.TXT
X:\EXPNO2\OPB02.TXT
X:\EXPNO2\OPD02.TXT
X:\EXPNO2\MOR02.TXT
X:\EXPNO2\HEL02.TXT
X:\EXPNO2\OPH02.TXT
X:\EXPNO2\OPI02.TXT
X:\EXPNO2\UTA02.TXT
X:\EXPNO2\UTP02.TXT
X:\EXPNO2\UTB02.TXT
X:\EXPNO2\UTC02.TXT
X:\EXPNO2\CRA02.TXT
X:\EXPNO2\CRB02.TXT
X:\EXPNO2\APA02.TXT
X:\EXPNO2\APB02.TXT
X:\EXPNO2\EQB02.TXT
X:\EXPNO2\FRA02.TXT
X:\EXPNO2\FRB02.TXT
X:\EXPNO2\CLA02.TXT
X:\EXPNO2\CLB02.TXT
X:\EXPNO2\CLC02.TXT
X:\EXPNO2\CLD02.TXT
X:\EXPNO2\RTV02.TXT
X:\EXPNO2\LSD02.TXT
X:\EXPNO2\OVB02.TXT
X:\EXPNO2\OVC02.TXT
X:\EXPNO2\VEQ02.TXT
X:\EXPNO2\VLR02.TXT

X:\EXPNO2\VOT02.TXT
X:\EXPNO2\INB02.TXT
X:\EXPNO2\IHB02.TXT
X:\EXPNO2\IHC02.TXT
X:\EXPNO2\MDB02.TXT
X:\EXPNO2\MDC02.TXT
X:\EXPNO2\EDA02.TXT
X:\EXPNO2\SUB02.TXT
X:\EXPNO2\ENT02.TXT
X:\EXPNO2\TRV02.TXT
X:\EXPNO2\TRD02.TXT
X:\EXPNO2\TRE02.TXT
X:\EXPNO2\TRF02.TXT
X:\EXPNO2\MIS02.TXT
X:\EXPNO2\CNT02.TXT
X:\EXPNO2\XPA02.TXT
X:\EXPNO2\XPB02.TXT
X:\EXPNO2\FN202.TXT
X:\EXPNO2\FNA02.TXT
X:\EXPNO2\FNB02.TXT

The file naming convention on the SAS CD-ROM is as follows:

X:\INTRVW02\FMLI021x.sd2 (Interview FMLY file for first quarter, 2002)
X:\INTRVW02\MEMI021x.sd2 (Interview MEMB file for first quarter, 2002)
X:\INTRVW02\MTBI021x.sd2 (Interview MTAB file for first quarter, 2002)
X:\INTRVW02\ITBI021x.sd2 (Interview ITAB file for first quarter, 2002)
X:\INTRVW02\FMLI022.sd2 (etc.)
X:\INTRVW02\MEMI022.sd2
X:\INTRVW02\MTBI022.sd2
X:\INTRVW02\ITBI022.sd2
X:\INTRVW02\FMLI023.sd2
X:\INTRVW02\MEMI023.sd2
X:\INTRVW02\MTBI023.sd2
X:\INTRVW02\ITBI023.sd2
X:\INTRVW02\FMLI024.sd2
X:\INTRVW02\MEMI024.sd2
X:\INTRVW02\MTBI024.sd2
X:\INTRVW02\ITBI024.sd2
X:\INTRVW02\FMLI031.sd2
X:\INTRVW02\MEMI031.sd2
X:\INTRVW02\MTBI031.sd2
X:\INTRVW02\ITBI031.sd2
X:\INTRVW02\UCCI02.txt
X:\INTRVW02\VEHI02.txt
X:\EXPNO2\APL02.sd2
X:\EXPNO2\RNT02.sd2
X:\EXPNO2\OPB02.sd2
X:\EXPNO2\OPD02.sd2
X:\EXPNO2\MOR02.sd2
X:\EXPNO2\HEL02.sd2
X:\EXPNO2\OPH02.sd2
X:\EXPNO2\OPI02.sd2
X:\EXPNO2\UTA02.sd2
X:\EXPNO2\UTP02.sd2
X:\EXPNO2\UTB02.sd2

X:\EXPNO2\UTC02.sd2
 X:\EXPNO2\CRA02.sd2
 X:\EXPNO2\CRB02.sd2
 X:\EXPNO2\APA02.sd2
 X:\EXPNO2\APB02.sd2
 X:\EXPNO2\EQB02.sd2
 X:\EXPNO2\FRA02.sd2
 X:\EXPNO2\FRB02.sd2
 X:\EXPNO2\CLA02.sd2
 X:\EXPNO2\CLB02.sd2
 X:\EXPNO2\CLC02.sd2
 X:\EXPNO2\CLD02.sd2
 X:\EXPNO2\RTV02.sd2
 X:\EXPNO2\LSD02.sd2
 X:\EXPNO2\OVB02.sd2
 X:\EXPNO2\OVC02.sd2
 X:\EXPNO2\VEQ02.sd2
 X:\EXPNO2\VLR02.sd2
 X:\EXPNO2\VOT02.sd2
 X:\EXPNO2\INB02.sd2
 X:\EXPNO2\IHB02.sd2
 X:\EXPNO2\IHC02.sd2
 X:\EXPNO2\MDB02.sd2
 X:\EXPNO2\MDC02.sd2
 X:\EXPNO2\EDA02.sd2
 X:\EXPNO2\SUB02.sd2
 X:\EXPNO2\ENT02.sd2
 X:\EXPNO2\TRV02.sd2
 X:\EXPNO2\TRD02.sd2
 X:\EXPNO2\TRE02.sd2
 X:\EXPNO2\TRF02.sd2
 X:\EXPNO2\MIS02.sd2
 X:\EXPNO2\CNT02.sd2
 X:\EXPNO2\XPA02.sd2
 X:\EXPNO2\XPB02.sd2
 X:\EXPNO2\FN202.sd2
 X:\EXPNO2\FNA02.sd2
 X:\EXPNO2\FNB02.sd2

B. RECORD COUNTS AND LOGICAL RECORD LENGTHS

The following are the number of records and the logical record lengths (LRECL) in each data set (recall that each EXPN file contains 5 quarters of data within a single data set):

| <u>ASCII data set</u> | <u>SAS data set</u> | <u>LRECL</u> | <u>Record Counts</u> |
|-----------------------|---------------------|--------------|----------------------|
| FMLYI021X.TXT | FMLI021X.SD2 | 4783 | 7691 |
| FMLYI022.TXT | FMLI022.SD2 | 4783 | 7778 |
| FMLYI023.TXT | FMLI023.SD2 | 4783 | 7833 |
| FMLYI024.TXT | FMLI024.SD2 | 4783 | 8024 |
| FMLYI031.TXT | FMLI031.SD2 | 4783 | 8086 |

| <u>ASCII data set</u> | <u>SAS data set</u> | <u>LRECL</u> | <u>Record Counts</u> |
|-----------------------|---------------------|--------------|----------------------|
| MEMBI021X.TXT | MEMI021X.SD2 | 311 | 19712 |
| MEMBI022.TXT | MEMI022.SD2 | 311 | 20061 |
| MEMBI023.TXT | MEMI023.SD2 | 311 | 20195 |
| MEMBI024.TXT | MEMI024.SD2 | 311 | 20384 |
| MEMBI031.TXT | MEMI031.SD2 | 311 | 20462 |
| MTABI021X.TXT | MTBI021X.SD2 | 35 | 716727 |
| MTABI022.TXT | MTBI022.SD2 | 35 | 685144 |
| MTABI023.TXT | MTBI023.SD2 | 35 | 703842 |
| MTABI024.TXT | MTBI024.SD2 | 35 | 710899 |
| MTABI031.TXT | MTBI031.SD2 | 35 | 735461 |
| ITABI021X.TXT | ITBI021X.SD2 | 34 | 391254 |
| ITABI022.TXT | ITBI022.SD2 | 34 | 395265 |
| ITABI023.TXT | ITBI023.SD2 | 34 | 398346 |
| ITABI024.TXT | ITBI024.SD2 | 34 | 405954 |
| ITABI031.TXT | ITBI031.SD2 | 34 | 406296 |
| <u>EXPN</u> | | | |
| APL02.TXT | APL02.SD2 | 38 | 347571 |
| RNT02.TXT | RNT02.SD2 | 94 | 13315 |
| OPB02.TXT | OPB02.SD2 | 95 | 31014 |
| OPD02.TXT | OPD02.SD2 | 64 | 130 |
| MOR02.TXT | MOR02.SD2 | 194 | 18389 |
| HEL02.TXT | HEL02.SD2 | 194 | 1914 |
| OPH02.TXT | OPH02.SD2 | 66 | 2230 |
| OPI02.TXT | OPI02.SD2 | 263 | 43001 |
| UTA02.TXT | UTA02.SD2 | 126 | 184979 |
| UTP02.TXT | UTP02.SD2 | 34 | 6150 |
| UTB02.TXT | UTB02.SD2 | 34 | 357 |
| UTC02.TXT | UTC02.SD2 | 60 | 447728 |
| CRA02.TXT | CRA02.SD2 | 38 | 1024 |
| CRB02.TXT | CRB02.SD2 | 219 | 13519 |
| APA02.TXT | APA02.SD2 | 52 | 3863 |
| APB02.TXT | APB02.SD2 | 43 | 39358 |
| EQB02.TXT | EQB02.SD2 | 36 | 4460 |
| FRA02.TXT | FRA02.SD2 | 36 | 41511 |
| FRB02.TXT | FRB02.SD2 | 41 | 170 |
| CLA02.TXT | CLA02.SD2 | 43 | 212347 |
| CLB02.TXT | CLB02.SD2 | 43 | 29597 |
| CLC02.TXT | CLC02.SD2 | 36 | 4628 |
| CLD02.TXT | CLD02.SD2 | 36 | 4078 |
| RTV02.TXT | RTV02.SD2 | 48 | 1031 |
| LSD02.TXT | LSD02.SD2 | 200 | 2578 |
| OVB02.TXT | OVB02.SD2 | 302 | 75796 |
| OVC02.TXT | OVC02.SD2 | 62 | 2600 |
| VEQ02.TXT | VEQ02.SD2 | 58 | 53027 |
| VLR02.TXT | VLR02.SD2 | 32 | 14951 |

| <u>ASCII data set</u> | <u>SAS data set</u> | <u>LRECL</u> | <u>Record Counts</u> |
|-----------------------|---------------------|--------------|----------------------|
| VOT02.TXT | VOT02.SD2 | 95 | 39413 |
| INB02.TXT | INB02.SD2 | 115 | 116949 |
| IHB02.TXT | IHB02.SD2 | 55 | 45071 |
| IHC02.TXT | IHC02.SD2 | 152 | 14157 |
| MDB02.TXT | MDB02.SD2 | 38 | 116009 |
| MDC02.TXT | MDC02.SD2 | 38 | 1672 |
| EDA02.TXT | EDA02.SD2 | 50 | 33209 |
| SUB02.TXT | SUB02.SD2 | 35 | 32468 |
| ENT02.TXT | ENT02.SD2 | 119 | 26830 |
| TRV02.TXT | TRV02.SD2 | 315 | 21129 |
| TRD02.TXT | TRD02.SD2 | 36 | 6279 |
| TRE02.TXT | TRE02.SD2 | 36 | 3530 |
| TRF02.TXT | TRF02.SD2 | 85 | 293 |
| MIS02.TXT | MIS02.SD2 | 36 | 80809 |
| CNT02.TXT | CNT02.SD2 | 36 | 46144 |
| XPA02.TXT | XPA02.SD2 | 130 | 39412 |
| XPB02.TXT | XPB02.SD2 | 166 | 39412 |
| FN202.TXT | FN202.SD2 | 33 | 34399 |
| FNA02.TXT | FNA02.SD2 | 42 | 9638 |
| FNB02.TXT | FNB02.SD2 | 76 | 9809 |

C. DATA FLAGS

Data fields on the FMLY, MEMB, and EXPN files are explained by flag variables following the data field. The names of the flag variables are derived from the names of the data fields they reference. In general the rule is to add an underscore to the last position of the data field name, for example, SALARYX becomes SALARYX_. However, if the data field name is eight characters in length, then the fifth position is replaced with an underscore; thus WELFAREX becomes WELF_REX. If the fifth position is already an underscore, then the fifth position is changed to a zero, so that EDUC_REF becomes EDUC0REF.

The flag values are defined as follows:

A flag value of "A" indicates a valid blank; that is, a blank field where a response is not anticipated.

A flag value of "B" indicates a blank resulting from an invalid nonresponse; that is, a nonresponse that is not consistent with other data reported by the CU.

A flag value of "C" refers to a blank resulting from a "don't know", refusal, or other type of nonresponse.

A flag value of "D" indicates that the data field contains a valid or good data value.

A flag value of "T" indicates topcoding has been applied to the data field.

A flag value of “H” identifies an expenditure that has been allocated to other records with the original expenditure being overwritten with a blank. (EXPN records only).

A flag value of “R” for recode has been created for the variable STATE_. Some Primary Sampling Units (PSUs) in some states are given “false” STATE codes for nondisclosure reasons. Cus with STATE_='R' (for recode) indicate that not all Cus with that particular STATE code are from that state. See Section IV.A. CU CHARACTERISTICS AND INCOME FILE (FMLY) on topcoding of CU characteristics and income for more detail.

D. FILE NOTATION

Every record from each data file includes the variable NEWID, the CU’s unique identification number, which is used to link records of one CU from several files across all quarters in which they participate.

Data fields for variables on the microdata files have either numeric or character values. The format column in the detailed variable descriptions (Section III.F. DETAILED VARIABLE DESCRIPTIONS) distinguishes whether a variable is numeric (NUM) or character (CHAR) and shows the number of field positions the variable occupies. Variables that include decimal points are formatted as NUM(t,r) where t is the total number of positions occupied, and r is the number of places to the right of the decimal.

In addition to format, these detailed listings give an item description, questionnaire source, identification of codes where applicable, and start position for each variable. The questionnaire source, which identifies where the data for that variable is collected on the questionnaire, is listed beneath the variable description and is formatted “S03B 2b”, which denotes Section 3, Part B, Question 2b of the questionnaire.

A star (*) is shown in front of new variables, those which have changed in format or definition, and those which have been deleted. Variables whose format has expanded are moved to the end of the files, and their original positions are left blank. New variables are added to the end of the files after variables whose format has changed. The positions of deleted variables are left blank.

Some variables require special notation. The following notation is used throughout the documentation for all files:

*D(Yxxq) identifies a variable that is deleted as of the quarterly file indicated. The year and quarter are identified by the ‘xx’ and ‘q’ respectively. For example, the notation *D(Y023) indicates the variable is deleted starting with the data file of the third quarter of 2002.

*N(Yxxq) identifies a variable that is added as of the quarterly file indicated. The year and quarter are identified by the ‘xx’ and ‘q’ for new variables in the same way as for deleted variables.

*L indicates that the variable can contain negative values.

E. ALLOCATION AND RECORD ORIGIN (EXPN)

Expenditures on the EXPN files that have been allocated can be identified through their flag variable, which will have a value, set to 'H' (see Section III.C. DATA FLAGS). These expenditures can be recreated using the fields SEQNO and ALCNO. SEQNO is a counter assigned to make records unique. ALCNO is zero for all original expenditure records. If ALCNO is greater than zero, the corresponding expenditure record is the result of allocation of an original record whose expenditure field has been replaced with a blank for that CU. By summing expenditures for records with ALCNO greater than zero and the same SEQNO as the original record, one can arrive at the value which was allocated.

The codes for the variable REC_ORIG, which are common to every EXPN file record, can be interpreted as follows:

CODED

- 1 Data reported in the current quarter's interview.
- 2 Data reported in the previous quarter's interview that are encompassed by the current reference period. These data are brought forward through the reference period adjustment process.
- 3 Data reported in the previous quarter's interview that are encompassed by the current reference period, and this logical record duplicates a logical record from the current interview month. These data are brought forward through the reference period adjustment process; the data duplication is also identified during this process.
- 4 Inventory data reported in previous quarters' interviews brought forward through the inventory update process. No updates are applied to this logical record as none are indicated in the current inventory chart.
- 5 Inventory data reported in previous quarters' interviews brought forward through the inventory update process. Updates are applied based upon data contained in the current inventory chart.
- 6 Data created by the processing system.

F. DETAILED VARIABLE DESCRIPTIONS

1. CONSUMER UNIT (CU) CHARACTERISTICS AND INCOME FILE (FMLY)

The "FMLY" file, also referred to as the "Consumer Unit Characteristics and Income" file, contains CU characteristics, CU income, and characteristics and earnings of the reference person and of the spouse. The file includes weights needed to calculate population estimates and variances. (See Sections V. ESTIMATION PROCEDURES and VI. RELIABILITY STATEMENT.)

Summary expenditure variables in this file can be combined to derive quarterly estimates for broad consumption categories. Demographic characteristics, such as family size, refer to the CU status on the date of the interview. Demographic characteristic information may change between interviews if, for example, a member enters or leaves the CU. Income variables contain annual values. Income data are collected in the second and fifth interviews only and cover the 12 months prior to the date of interview. Income data collected in the second interview are copied to the third and fourth interviews. Income data are updated only if a CU member over 13 is new to the CU or has not worked in previous interviews and has now started working. When there is a valid nonresponse, or where nonresponse occurs and there is

no imputation, there will be missing values. The type of nonresponse is explained by associated data flag variables described in Section III.C. DATA FLAGS.

a. CU AND INTERVIEW IDENTIFIERS

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|---|-----------------------|---------------|
| NEWID | CU identification number. Digits 1-7 (CU sequence number, 1 through 9999999) uniquely identify the CU. Digit 8 is the interview number, 2 through 5. It is possible for a CU to skip an interview. For example, a CU could have a 2 nd , 3 rd and 5 th interview but no 4 th interview. BLS derived | 1 | NUM(8) |
| HH_CU_Q | Count of CUs in household BLS derived | 3269 | NUM(2) |
| HH_CU_Q_ | | 3271 | CHAR(1) |
| HHID | Identifier of household with more than one CU. Household with only one CU will be set to missing. BLS derived | 3272 | NUM(3) |
| HHID_ | | 3275 | CHAR(1) |
| QINTRVMO | Interview month Control Card 37 | 663 | CHAR(2) |
| QINTRVYR | Interview year Control Card 37 | 665 | CHAR(4) |
| *CUID | Consumer unit identifying variable, constructed using the first seven digits of NEWID BLS derived N(021) | 4776 | NUM(7) |
| *INTERI | Interview number; it is the last digit of NEWID BLS derived N(021) | 4783 | NUM(1) |

b. CU CHARACTERISTICS

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|----------|--|----------------|----------------|
| REGION | Region CODED 1 Northeast 2 Midwest 3 South 4 West BLS derived | 673 | CHAR(1) |
| BLS_URBN | Urban/Rural CODED 1 Urban 2 Rural BLS derived | 49 | CHAR(1) |
| POPSIZE | Population size of the PSU CODED 1 More than 4 million 2 1.20-4 million 3 0.33-1.19 million 4 125-329.9 thousand 5 Less than 125 thousand BLS derived | 639 | CHAR(1) |
| SMSASTAT | Does CU reside inside a Metropolitan Statistical Area (MSA)? CODED 1 Yes 2 No BLS derived | 760 | CHAR(1) |
| STATE | State identifier (see Section IV.A. and Section X.D. for important information) | 3326 | CHAR(2) |
| | 01 Alabama | *28 | Mississippi |
| | 02 Alaska | **29 | Missouri |
| RR | 04 Arizona | 31 | Nebraska |
| * | 05 Arkansas | R32 | Nevada |
| ** | 06 California | R33 | New Hampshire |
| | 08 Colorado | 34 | New Jersey |
| | 09 Connecticut | *35 | New Mexico |
| | 10 Delaware | RR**36 | New York |
| R | 11 District of Columbia | **37 | North Carolina |
| ** | 12 Florida | RR39 | Ohio |
| ** | 13 Georgia | **40 | Oklahoma |
| | 15 Hawaii | **41 | Oregon |
| | 16 Idaho | 42 | Pennsylvania |
| ** | 17 Illinois | 45 | South Carolina |
| RR** | 18 Indiana | *46 | South Dakota |

| | | | |
|------|---------------|------|---------------|
| *19 | Iowa | **47 | Tennessee |
| **20 | Kansas | 48 | Texas |
| 21 | Kentucky | 49 | Utah |
| 22 | Louisiana | 50 | Vermont |
| R*23 | Maine | **51 | Virginia |
| 24 | Maryland | **53 | Washington |
| 25 | Massachusetts | R54 | West Virginia |
| **26 | Michigan | 55 | Wisconsin |
| **27 | Minnesota | | |

* indicates that the STATE code has been suppressed for all sampled Cus in that state (STATE_ = 'T' for all observations).

** indicates that the STATE code has been suppressed for some sampled Cus in that state (STATE_ = 'T' for some observations).

R indicates that either all observations from this state have been re-coded or all strata¹ of observations from this state include "re-codes" from other states.

RR indicates that either some observations from this state have been re-coded or at least one stratum¹ of observations from this state includes "re-codes" from other states.

R* indicates that the STATE code has been suppressed for some sampled Cus in that state and, either STATE has been re-coded or the state includes "re-codes" from other states in all strata¹.

RR** indicates that the STATE code has been suppressed for some sampled Cus in that state and, either STATE has been re-coded or the state includes "re-codes" from other states in at least one stratum¹.

1 A STATE stratum is a unique POPSIZE and BLS_URBN combination.

States not listed are not in the CE sample.

Census derived

| | | | |
|--------|--|------|---------|
| STATE_ | | 3328 | CHAR(1) |
|--------|--|------|---------|

| | | | |
|----------|----------------------|-----|---------|
| CUTENURE | Housing tenure CODED | 216 | CHAR(1) |
|----------|----------------------|-----|---------|

- 1 Owned with mortgage
- 2 Owned without mortgage
- 3 Owned mortgage not reported
- 4 Rented
- 5 Occupied without payment of cash rent
- 6 Student housing

BLS derived

| | | | |
|----------|--|-----|---------|
| CUTE_URE | | 217 | CHAR(1) |
|----------|--|-----|---------|

| | | | |
|----------|-------------------------|-----|--------|
| FAM_SIZE | Number of members in CU | 242 | NUM(2) |
|----------|-------------------------|-----|--------|

BLS derived

| | | | |
|----------|---|-----|---------|
| FAM__IZE | | 244 | CHAR(1) |
| AS_COMP1 | Number of males age 16 and over in CU BLS derived | 26 | NUM(2) |
| AS_C_MP1 | | 28 | CHAR(1) |
| AS_COMP2 | Number of females age 16 and over in CU BLS derived | 29 | NUM(2) |
| AS_C_MP2 | | 31 | CHAR(1) |
| AS_COMP3 | Number of males age 2 through 15 in CU BLS derived | 32 | NUM(2) |
| AS_C_MP3 | | 34 | CHAR(1) |
| AS_COMP4 | Number of females age 2 through 15 in CU BLS derived | 35 | NUM(2) |
| AS_C_MP4 | | 37 | CHAR(1) |
| AS_COMP5 | Number of members under age 2 in CU BLS derived | 38 | NUM(2) |
| AS_C_MP5 | | 40 | CHAR(1) |
| PERSLT18 | Number of children less than 18 in CU BLS derived | 633 | NUM(2) |
| PERS_T18 | | 635 | CHAR(1) |
| PERSOT64 | Number of persons over 64 in CU BLS derived | 636 | NUM(2) |
| PERS_T64 | | 638 | CHAR(1) |

| | | | |
|----------|--|------|---------|
| CHILDAGE | Age of children of reference person CODED 0 No children 1 All children less than 6 2 Oldest child between 6 and 11 and at least one child less than 6 3 All children between 6 and 11 4 Oldest child between 12 and 17 and at least one child less than 12 5 All children between 12 and 17 6 Oldest child greater than 17 and at least one child less than 17 7 All children greater than 17 BLS derived | 3322 | CHAR(1) |
| CHIL_AGE | | 3323 | CHAR(1) |
| FAM_TYPE | CU type is based on relationship of members to reference person. "Own" children include blood-related sons and daughters, step children and adopted children. CODED 1 Husband and wife (H/W) only 2 H/W, own children only, oldest child under 6 years old 3 H/W, own children only, oldest child 6 to 17 years old 4 H/W, own children only, oldest child over 17 years old 5 All other H/W Cus 6 One parent, male, own children only, at least one child age under 18 years old 7 One parent, female, own children only, at least one child age under 18 years old 8 Single persons 9 Other Cus BLS derived | 245 | CHAR(1) |
| FAM__YPE | | 246 | CHAR(1) |
| NO_EARNR | Number of earners BLS derived | 556 | NUM(2) |
| NO_E_RNR | | 558 | CHAR(1) |

| | | | |
|----------|---|------|---------|
| EARNCOMP | Composition of earners CODED 1 Reference person only 2 Reference person and spouse 3 Reference person, spouse and others 4 Reference person and others 5 Spouse only 6 Spouse and others 7 Others only 8 No earners BLS derived | 221 | CHAR(1) |
| EARN_OMP | | 222 | CHAR(1) |
| PRINEARN | Member number (MEMBNO in the MEMB files) of the principal earner. BLS derived | 640 | CHAR(2) |
| PRIN_ARN | | 642 | CHAR(1) |
| VEHQ | Number of owned vehicles BLS derived | 809 | NUM(2) |
| VEHQ_ | | 811 | CHAR(1) |
| NUM_AUTO | Number of owned automobiles BLS derived | 581 | NUM(2) |
| NUM__UTO | | 583 | CHAR(1) |
| VEHQL | Total number of leased autos, trucks and vans BLS derived | 3456 | NUM(2) |
| VEHQL_ | | 3458 | CHAR(1) |
| NUM_TVAN | Total number of owned trucks and vans BLS derived | 3459 | NUM(2) |
| NUM__VAN | | 3461 | CHAR(1) |

| | | | |
|----------|--|------|----------|
| INCLASS | Income class of CU based on income before taxes (Codes 01 through 09 are for Cus considered complete reporters of income). CODED 01 Less than \$5,000 02 \$5,000 to \$9,999 03 \$10,000 to \$14,999 04 \$15,000 to \$19,999 05 \$20,000 to \$29,999 06 \$30,000 to \$39,999 07 \$40,000 to \$49,999 08 \$50,000 to \$69,999 09 \$70,000 and over 10 Incomplete income reported BLS derived | 3324 | CHAR(2) |
| INCLASS2 | Income class based on INC_RANK CODED 1 Less than 0.1667 2 0.1667 – 0.3333 3 0.3334 – 0.4999 4 0.5000 – 0.6666 5 0.6667 – 0.8333 6 0.8334 – 1.0000 7 Incomplete reporting BLS derived | 4774 | CHAR(1) |
| INCL_SS2 | | 4775 | CHAR(1) |
| RESPSTAT | Completeness of income response CODED 1 Complete income respondent 2 Incomplete income respondent BLS derived | 681 | CHAR(1) |
| RESP_TAT | | 682 | CHAR(1) |
| INC_RANK | Weighted cumulative percent income ranking of CU to total population. Ranking based on income before taxes for complete reporters. Rank of incomplete income reporters is set to zero. BLS derived | 435 | NUM(9,7) |
| INC__ANK | | 445 | CHAR(1) |

| | | | |
|----------|--|------|------------|
| INC_RNKU | Weighted cumulative percent income ranking of CU to urban population. Ranking based on income before taxes for complete reporters (urban CUs only). Rank of incomplete income reporters and rural CUs are set to zero. | 446 | NUM(9,7) |
| | BLS derived | | |
| INC__NKU | | 455 | CHAR(1) |
| ERANKMTH | Dollar amount used for expenditure ranking (ERANKH and ERANKUH) based on expenditure outlays made during the reference (interview) period. Includes all mortgage and vehicle principal payments; excludes outlays for items collected only in the fifth interview. | 3356 | NUM (11,4) |
| | *L BLS derived | | |
| ERAN_MTH | | 3367 | CHAR(1) |
| ERANKH | Weighted cumulative percent expenditure outlay ranking of CU to total population. Expenditure outlay is based on ERANKMTH. The value is a number between 0 and 1. Rank of incomplete income reporters is blank. | 3368 | NUM (8,7) |
| | BLS derived | | |
| ERANKH_ | | 3377 | CHAR(1) |
| ERANKUH | Weighted cumulative percent expenditure outlay ranking of CU to urban population. Expenditure outlay is based on ERANKMTH. The value is a number between 0 and 1. Rank of incomplete income reporters is blank. | 3378 | NUM (8,7) |
| | BLS derived | | |
| ERANKUH_ | | 3386 | CHAR(1) |
| POV_CY | Is CU income below current year's poverty threshold? (Income is defined as FINCBTAX-JFDSTMPA.) CODED 1 Yes 2 No | 3276 | CHAR(1) |
| | BLS derived | | |
| POV_CY_ | | 3277 | CHAR(1) |
| POV_PY | Is CU income below previous year's poverty threshold? (Income is defined as FINCBTAX-JFDSTMPA.) CODED 1 Yes 2 No | 3278 | CHAR(1) |
| | BLS derived | | |

| | | | |
|----------|--|------|---------|
| POV_PY_ | | 3279 | CHAR(1) |
| POVLEVCY | Poverty threshold for this CU in the Current year. | 4182 | NUM(8) |
| POVL_VCY | Flag | 4190 | CHAR(1) |
| POVLEVPY | Poverty threshold for this CU in the previous year. | 4191 | NUM(8) |
| POVL_VPY | Flag | 4199 | CHAR(1) |
| CUINCOME | Total CU Income CODED 2 Loss 02 Under \$3,000 03 \$3,000 to \$5,999 04 \$6,000 to \$7,499 05 \$7,500 to \$9,999 06 \$10,000 to \$12,999 07 \$13,000 to \$14,999 08 \$15,000 to \$19,999 09 \$20,000 to \$24,999 10 \$25,000 to \$29,999 11 \$30,000 to \$34,999 12 \$35,000 to \$49,999 13 \$50,000 to \$74,999 14 \$75,000+ 15 Refused S24 1 | 3435 | CHAR(2) |
| CUIN_OME | | 3437 | CHAR(1) |
| RECORDS | In answering questions about expenses, did the respondent consult bills, receipts, check stubs, expense books, tax returns, or other records? CODED 1 Always 2 Almost always 3 Mostly 4 Occasionally 5 Almost never 6 Never S01A 8c | 3438 | CHAR(1) |
| RECORDS_ | | 3439 | CHAR(1) |
| TYPEREC1 | If any bills, receipts, or records were used, which ones did the respondent(s) use to give cost information? CODED 1 Bills S01A 8d | 3440 | CHAR(1) |
| TYPE_EC1 | | 3441 | CHAR(1) |

| | | | |
|----------|---|------|---------|
| TYPEREC2 | See TYPEREC1 for question and source. CODED 2 Checkbook ledger or stubs | 3442 | CHAR(1) |
| TYPE_EC2 | | 3443 | CHAR(1) |
| TYPEREC3 | See TYPEREC1 for question and source. CODED 3 Canceled checks | 3444 | CHAR(1) |
| TYPE_EC3 | | 3445 | CHAR(1) |
| TYPEREC4 | See TYPEREC1 for question and source. CODED 4 Receipts of purchase (sales slip) | 3446 | CHAR(1) |
| TYPE_EC4 | | 3447 | CHAR(1) |
| TYPEREC5 | See TYPEREC1 for question and source. CODED 5 Home file (provided by Census Bureau) | 3448 | CHAR(1) |
| TYPE_EC5 | | 3449 | CHAR(1) |
| TYPEREC6 | See TYPEREC1 for question and source. CODED 6 Contracts or agreements | 3450 | CHAR(1) |
| TYPE_EC6 | | 3451 | CHAR(1) |
| TYPEREC7 | See TYPEREC1 for question and source. CODED 7 Bank statements | 3452 | CHAR(1) |
| TYPE_EC7 | | 3453 | CHAR(1) |
| TYPEREC8 | See TYPEREC1 for question and source. CODED 8 Other | 3454 | CHAR(1) |
| TYPE_EC8 | | 3455 | CHAR(1) |

c. CHARACTERISTICS OF REFERENCE PERSON AND SPOUSE

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|-------------------------|-----------------------|---------------|
| AGE_REF | Age of reference person | 11 | NUM(2) |
| | BLS derived | | |
| AGE_REF_ | | 13 | CHAR(1) |

| | | | |
|----------|--|-----|---------|
| REF_RACE | Race of reference person CODED 1 White 2 Black 3 American Indian, Aleut, or Eskimo 4 Asian or Pacific Islander BLS derived | 671 | CHAR(1) |
| REF__ACE | | 672 | CHAR(1) |
| SEX_REF | Sex of reference person CODED 1 Male 2 Female BLS derived | 738 | CHAR(1) |
| SEX_REF_ | | 739 | CHAR(1) |
| MARITAL1 | Marital status of reference person CODED 1 Married 2 Widowed 3 Divorced 4 Separated 5 Never married BLS derived | 536 | CHAR(1) |
| MARI_AL1 | | 537 | CHAR(1) |

| | | | |
|----------|--|-----|---------|
| ORIGIN1 | Origin or ancestry of reference person CODED | 599 | CHAR(1) |
| | <ul style="list-style-type: none"> 1 European: <ul style="list-style-type: none"> German Italian Irish French Polish Russian English Scottish Dutch Swedish Hungarian 2 Spanish: <ul style="list-style-type: none"> Mexican American Chicano Mexican Puerto Rican Cuban Central or South American Other Spanish 3 Afro-American (Black or Negro) 4 Another group not listed / Don't know | | |
| | BLS derived | | |
| ORIGIN1_ | | 600 | CHAR(1) |
| EDUC_REF | Education of reference person CODED | 233 | CHAR(2) |
| | <ul style="list-style-type: none"> 00 Never attended school 10 First through eighth grade 11 Ninth through twelfth grade (no H.S. diploma) 12 High school graduate 13 Some college, less than college graduate 14 Associate's degree (occupational/vocational or academic) 15 Bachelor's degree 16 Master's degree 17 Professional/Doctorate degree | | |
| | BLS derived | | |
| EDUC0REF | | 235 | CHAR(1) |
| AGE2 | Age of spouse | 14 | NUM(2) |
| | BLS derived | | |
| AGE2_ | | 16 | CHAR(1) |

| | | | |
|----------|--|-----|---------|
| RACE2 | Race of spouse CODED – same as REF_RACE BLS derived | 669 | CHAR(1) |
| RACE2_ | | 670 | CHAR(1) |
| SEX2 | Sex of spouse CODED – same as SEX_REF BLS derived | 740 | CHAR(1) |
| SEX2_ | | 741 | CHAR(1) |
| ORIGIN2 | Origin or ancestry of spouse CODED – same as ORIGIN1 BLS derived | 601 | CHAR(1) |
| ORIGIN2_ | | 602 | CHAR(1) |
| EDUCA2 | Education of spouse CODED – same as EDUC_REF BLS derived | 236 | CHAR(2) |
| EDUCA2_ | | 238 | CHAR(1) |

d. WORK EXPERIENCE OF REFERENCE PERSON AND SPOUSE

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|--|-----------------------|---------------|
| INCWEEK1 | Number of weeks worked by reference person full or part time in last 12 months, including paid vacation and paid sick leave BLS derived | 482 | NUM(2) |
| INCW_EK1 | | 484 | CHAR(1) |
| INC_HRS1 | Number of hours usually worked per week by reference person BLS derived | 427 | NUM(3) |
| INC_RS1 | | 430 | CHAR(1) |

| | | | |
|----------|--|-----|---------|
| OCCUCOD1 | The job in which reference person received the most earnings during the past 12 months best fits the following category. CODED Manager, professional 01 Administrator, manager 02 Teacher 03 Professional Administrative support, technical, sales 04 Administrative support, including clerical 05 Sales, retail 06 Sales, business goods and services 07 Technician Service 08 Protective service 09 Private household service 10 Other service Operator, assembler, laborer 11 Machine operator, assembler, inspector 12 Transportation operator 13 Handler, helper, laborer Precision production, craft, repair 14 Mechanic, repairer, precision production 15 Construction, mining Farming, forestry, fishing 16 Farming 17 Forestry, fishing, groundskeeping Armed forces 3 Armed forces | 593 | CHAR(2) |
| OCCU_OD1 | BLS derived | 595 | CHAR(1) |
| INCOMEY1 | Employer from which reference person received the most earnings in past 12 months CODED 1 Private company, business or individual 2 Federal government 3 State government 4 Local government 5 Self-employed in own business, professional practice or farm 6 Family business or farm, working without pay BLS derived | 478 | CHAR(1) |
| INCO_EY1 | | 479 | CHAR(1) |

| | | | |
|----------|--|-----|---------|
| INCNONW1 | Reason reference person did not work during the past 12 months CODED 1 Retired 2 Taking care of home/CU 3 Going to school 4 Ill, disabled, unable to work 5 Unable to find work 6 Doing something else BLS derived | 474 | CHAR(1) |
| INCN_NW1 | | 475 | CHAR(1) |
| INCWEEK2 | Number of weeks worked by spouse full or part time in last 12 months, including paid vacation and paid sick leave BLS derived | 485 | NUM(2) |
| INCW_EK2 | | 487 | CHAR(1) |
| INC_HRS2 | Number of hours usually worked per week by spouse BLS derived | 431 | NUM(3) |
| INC__RS2 | | 434 | CHAR(1) |
| OCCUCOD2 | Job in which spouse received the most earnings during the past 12 months CODED – same as OCCUCOD1 BLS derived | 596 | CHAR(2) |
| OCCU_OD2 | | 598 | CHAR(1) |
| INCOMEY2 | Employer from which spouse received most earnings during the past 12 months CODED – same as INCOMEY1 BLS derived | 480 | CHAR(1) |
| INCO_EY2 | | 481 | CHAR(1) |
| INCNONW2 | Reason spouse did not work during the past 12 months CODED – same as INCNONW1 BLS derived | 476 | CHAR(1) |
| INCN_NW2 | | 477 | CHAR(1) |

e. INCOME

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|----------|--|----------------|---------|
| FINCBTAX | Amount of CU income before taxes in past 12 months (FSALARYX + FNONFRMX + FFRMINCX + FRRETIRX + FSSIX + UNEMPLX + COMPENSX + WELFAREX + INTEARNX + FININCX + PENSIONX + INCLOSSA + INCLOSSB + ALIOTHX + CHDOTHX + OTHRINCX + COMPNSBX + UNEMPLBX + WELFREBX + INTERNBX + FININCBX + INCLSABX + PNSIONBX + INCLSBBX + CHDOTHBX + ALIOTHBX + OTRINCBX + FOODSMPX + FOODSPBX) *L BLS derived | 303 | NUM(9) |
| FINCBT_X | | 312 | CHAR(1) |
| FINCATAX | Amount of CU income after taxes in past 12 months (FINCBTAX – TOTTXPDX) *L BLS derived | 293 | NUM(9) |
| FINCAT_X | | 302 | CHAR(1) |
| EARNINCX | Amount of earned income before taxes by CU in past 12 months (FSALARYX + FNONFRMX + FFRMINCX) *L BLS derived | 223 | NUM(9) |
| EARN_NCX | | 232 | CHAR(1) |
| NO_EARNX | Amount of CU income other than earnings before taxes in past 12 months (FRRETIRX + FSSIX + UNEMPLX + COMPENSX + WELFAREX + INTEARNX + FININCX + PENSIONX + INCLOSSA + INCLOSSB + ALIOTHX + CHDOTHX + OTHRINCX + UNEMPLBX + COMPNSBX + WELFREBX + INTERNBX + FININCBX + PNSIONBX + INCLSABX + INCLSBBX + ALIOTHBX + CHDOTHBX + OTRINCBX + FOODSMPX + FOODSPBX). *L BLS derived | 559 | NUM(9) |
| NO_E_RNX | | 568 | CHAR(1) |
| FSALARYX | Amount of wage and salary income before deductions received by all CU members in past 12 months (sum SALARYX + SALARYBX from MEMB file for all CU members) BLS derived | 388 | NUM(8) |

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|----------|--|-----|---------|
| FSAL_RYX | | 396 | CHAR(1) |
| FNONFRMX | Amount of income or loss from nonfarm business, partnership or professional practice received by all CU members in past 12 months (sum NONFARMX + NONFRMBX from MEMB file for all CU members) *L BLS derived | 351 | NUM(9) |
| FNON_RMX | | 360 | CHAR(1) |
| FFRMINCX | Amount of income or loss from own farm received by all CU members in past 12 months (sum FARMINCX + FRMINCBX from MEMB file for all CU members) *L BLS derived | 274 | NUM(9) |
| FFRM_NCX | | 283 | CHAR(1) |
| FRRETIRX | Amount of Social Security and Railroad Retirement income prior to deductions for medical insurance and Medicare received by all CU members in past 12 months (sum SOCRRX from MEMB file for all CU members) BLS derived | 379 | NUM(8) |
| FRRE_IRX | | 387 | CHAR(1) |
| FSSIX | Amount of Supplemental Security Income from all sources received by all CU members in past 12 months (sum SSIX + SSIBX from MEMB file for all members) BLS derived | 406 | NUM(8) |
| FSSIX_ | | 414 | CHAR(1) |
| UNEMPLX | During the past 12 months, what was the total amount of income from unemployment compensation received by ALL CU members? S 22B 4b | 791 | NUM(8) |
| UNEMPLX_ | | 799 | CHAR(1) |

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|----------|---|------|---------|
| UNEMPLB | Bracketed variable for UNEMPLX | 4644 | CHAR(2) |
| | CODED | | |
| | 01 \$0 - \$999 | | |
| | 02 \$1,000 - \$1,999 | | |
| | 03 \$2,000 - \$2,999 | | |
| | 04 \$3,000 - \$3,999 | | |
| | 05 \$4,000 - \$4,999 | | |
| | 06 \$5,000 - \$9,999 | | |
| | 07 \$10,000 - \$14,999 | | |
| | 08 \$15,000 - \$19,999 | | |
| | 09 \$20,000 - \$29,999 | | |
| | 10 \$30,000 - \$39,999 | | |
| | 11 \$40,000 - \$49,999 | | |
| | 12 \$50,000 and over | | |
| | S 22B 4c | | |
| UNEMPLB_ | | 4646 | CHAR(1) |
| UNEMPLBX | Median of bracket range of UNEMPLB | 4647 | NUM(6) |
| | BLS derived | | |
| UNEM_LBX | | 4653 | CHAR(1) |
| COMPENSX | During the past 12 months, what was the total amount of income from workers' compensation or veterans' benefits, including education benefits, but excluding military retirement, received by ALL CU members? | 165 | NUM(8) |
| | S 22B 5b | | |
| COMP_NSX | | 173 | CHAR(1) |
| COMPENSB | Bracketed variable for COMPENSX | 4654 | CHAR(2) |
| | CODED | | |
| | 01 \$0 - \$999 | | |
| | 02 \$1,000 - \$1,999 | | |
| | 03 \$2,000 - \$2,999 | | |
| | 04 \$3,000 - \$3,999 | | |
| | 05 \$4,000 - \$4,999 | | |
| | 06 \$5,000 - \$9,999 | | |
| | 07 \$10,000 - \$14,999 | | |
| | 08 \$15,000 - \$19,999 | | |
| | 09 \$20,000 - \$29,999 | | |
| | 10 \$30,000 - \$39,999 | | |
| | 11 \$40,000 - \$49,999 | | |
| | 12 \$50,000 and over | | |
| | S 22B 5c | | |
| COMP_NSB | | 4656 | CHAR(1) |

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|----------|--|------|---------|
| COMPNSBX | Median of bracket range of COMPENSB BLS derived | 4657 | NUM(6) |
| COMP_SBX | | 4663 | CHAR(1) |
| WELFAREX | During the past 12 months, what was the total amount of income from public assistance or welfare including money received from job training grants such as Job Corps received by ALL CU members? S 22B 6b | 832 | NUM(8) |
| WELF_REX | | 840 | CHAR(1) |
| WELFAREB | Bracketed variable for WELFAREX CODED 01 \$0 - \$999 02 \$1,000 - \$1,999 03 \$2,000 - \$2,999 04 \$3,000 - \$3,999 05 \$4,000 - \$4,999 06 \$5,000 - \$9,999 07 \$10,000 - \$14,999 08 \$15,000 - \$19,999 09 \$20,000 - \$29,999 10 \$30,000 - \$39,999 11 \$40,000 - \$49,999 12 \$50,000 and over S 22B 6c | 4664 | CHAR(2) |
| WELF_REB | | 4666 | CHAR(1) |
| WELFREBX | Median of bracket range of WELFAREB BLS derived | 4667 | NUM(6) |
| WELF_EBX | | 4673 | CHAR(1) |
| INTEARNX | During the past 12 months, what was the total amount of income from interest on savings accounts or bonds received by ALL CU members? S 22B 1b | 497 | NUM(8) |
| INTE_RNX | | 505 | CHAR(1) |

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|----------|--|------|---------|
| INTEARNB | Bracketed variable for INTEARNX | 4614 | CHAR(2) |
| | CODED | | |
| | 01 \$0 - \$999 | | |
| | 02 \$1,000 - \$1,999 | | |
| | 03 \$2,000 - \$2,999 | | |
| | 04 \$3,000 - \$3,999 | | |
| | 05 \$4,000 - \$4,999 | | |
| | 06 \$5,000 - \$9,999 | | |
| | 07 \$10,000 - \$14,999 | | |
| | 08 \$15,000 - \$19,999 | | |
| | 09 \$20,000 - \$29,999 | | |
| | 10 \$30,000 - \$39,999 | | |
| | 11 \$40,000 - \$49,999 | | |
| | 12 \$50,000 and over | | |
| | S 22B 1c | | |
| INTE_RNB | | 4616 | CHAR(1) |
| INTERNBX | Median of bracket range of INTEARNB | 4617 | NUM(6) |
| | BLS derived | | |
| INTE_NBX | | 4623 | CHAR(1) |
| FININCX | During the past 12 months, what was the total amount of regular income from dividends, royalties, estates, or trusts received by ALL CU members? | 322 | NUM(8) |
| | S 22B 2b | | |
| FININCX_ | | 330 | CHAR(1) |
| FININCB | Bracketed variable for FININCX | 4624 | CHAR(2) |
| | CODED | | |
| | 01 \$0 - \$999 | | |
| | 02 \$1,000 - \$1,999 | | |
| | 03 \$2,000 - \$2,999 | | |
| | 04 \$3,000 - \$3,999 | | |
| | 05 \$4,000 - \$4,999 | | |
| | 06 \$5,000 - \$9,999 | | |
| | 07 \$10,000 - \$14,999 | | |
| | 08 \$15,000 - \$19,999 | | |
| | 09 \$20,000 - \$29,999 | | |
| | 10 \$30,000 - \$39,999 | | |
| | 11 \$40,000 - \$49,999 | | |
| | 12 \$50,000 and over | | |
| | S 22B 2c | | |
| FININCB_ | | 4626 | CHAR(1) |

| | | | |
|----------|--|------|---------|
| FININCBX | Median of bracket range of FININCB BLS derived | 4627 | NUM(6) |
| FINI_CBX | | 4633 | CHAR(1) |
| PENSIONX | During the past 12 months, what was the total amount of income from pensions or annuities from private companies, military, Government, IRA, or Keogh received by ALL CU members? S 22B 3b | 624 | NUM(8) |
| PENS_ONX | | 632 | CHAR(1) |
| PENSIONB | Bracketed variable for PENSIONX CODED 01 \$0 - \$999 02 \$1,000 - \$1,999 03 \$2,000 - \$2,999 04 \$3,000 - \$3,999 05 \$4,000 - \$4,999 06 \$5,000 - \$9,999 07 \$10,000 - \$14,999 08 \$15,000 - \$19,999 09 \$20,000 - \$29,999 10 \$30,000 - \$39,999 11 \$40,000 - \$49,999 12 \$50,000 and over S 22B 3c | 4634 | CHAR(2) |
| PENS_ONB | | 4636 | CHAR(1) |
| PNSIONBX | Median of bracket range of PENSIONB BLS derived | 4637 | NUM(6) |
| PNSI_NBX | | 4643 | CHAR(1) |
| INCLOSSA | During the past 12 months, how much net income or loss was received from roomers or boarders? *L S 22B 8a | 456 | NUM(8) |
| INCL_SSA | | 464 | CHAR(1) |

| | | | |
|----------|--|------|---------|
| INCLOSAB | Bracketed variable for INCLOSSA | 4694 | CHAR(2) |
| | CODED | | |
| | 00 Loss | | |
| | 01 \$0 - \$999 | | |
| | 02 \$1,000 - \$1,999 | | |
| | 03 \$2,000 - \$2,999 | | |
| | 04 \$3,000 - \$3,999 | | |
| | 05 \$4,000 - \$4,999 | | |
| | 06 \$5,000 - \$9,999 | | |
| | 07 \$10,000 - \$14,999 | | |
| | 08 \$15,000 - \$19,999 | | |
| | 09 \$20,000 - \$29,999 | | |
| | 10 \$30,000 - \$39,999 | | |
| | 11 \$40,000 - \$49,999 | | |
| | 12 \$50,000 and over | | |
| | S 22B 8b | | |
| INCL_SAB | | 4696 | CHAR(1) |
| INCLSABX | Median of bracket range of INCLOSAB | 4697 | NUM(6) |
| | *L | | |
| | BLS derived | | |
| INCL_ABX | | 4703 | CHAR(1) |
| INCLOSSB | During the past 12 months, how much net income or loss was received from payments from other rental units? | 465 | NUM(8) |
| | *L | | |
| | S 22B 8c | | |
| INCL_SSB | | 473 | CHAR(1) |
| INCLOSBB | Bracketed variable for INCLOSSB | 4704 | CHAR(2) |
| | CODED | | |
| | 00 Loss | | |
| | 01 \$0 - \$999 | | |
| | 02 \$1,000 - \$1,999 | | |
| | 03 \$2,000 - \$2,999 | | |
| | 04 \$3,000 - \$3,999 | | |
| | 05 \$4,000 - \$4,999 | | |
| | 06 \$5,000 - \$9,999 | | |
| | 07 \$10,000 - \$14,999 | | |
| | 08 \$15,000 - \$19,999 | | |
| | 09 \$20,000 - \$29,999 | | |
| | 10 \$30,000 - \$39,999 | | |
| | 11 \$40,000 - \$49,999 | | |
| | 12 \$50,000 and over | | |
| | S 22B 8d | | |
| INCL_SBB | | 4706 | CHAR(1) |

| | | | |
|----------|---|------|---------|
| INCLSBBX | Median of bracket range of INCLOSBB *L BLS derived | 4707 | NUM(6) |
| INCL_BBX | | 4713 | CHAR(1) |
| CHDOTHX | During the past 12 months, what was the total amount of income from child support payments in other than a lump sum amount received by ALL CU members? S 22B 9d | 3329 | NUM(8) |
| CHDOTHX_ | | 3337 | CHAR(1) |
| CHDOTHB | Bracketed variable for CHDOTHX CODED 01 \$0 - \$999 02 \$1,000 - \$1,999 03 \$2,000 - \$2,999 04 \$3,000 - \$3,999 05 \$4,000 - \$4,999 06 \$5,000 - \$9,999 07 \$10,000 - \$14,999 08 \$15,000 - \$19,999 09 \$20,000 - \$29,999 10 \$30,000 - \$39,999 11 \$40,000 - \$49,999 12 \$50,000 and over S 22B 9e | 4724 | CHAR(2) |
| CHDOTHB_ | | 4726 | CHAR(1) |
| CHDOTHBX | Median of bracket range of CHDOTHB BLS derived | 4727 | NUM(6) |
| CHDO_HBX | | 4733 | CHAR(1) |
| ALIOTHX | During the past 12 months, what was the total amount of income from regular contributions from alimony and other sources such as from persons outside the CU received by ALL CU members? S 22B 9h | 3338 | NUM(8) |
| ALIOTHX_ | | 3346 | CHAR(1) |

| | | | |
|----------|--|------|---------|
| ALIOTHB | Bracketed variable for ALIOTHX | 4734 | CHAR(2) |
| | CODED | | |
| | 01 \$0 - \$999 | | |
| | 02 \$1,000 - \$1,999 | | |
| | 03 \$2,000 - \$2,999 | | |
| | 04 \$3,000 - \$3,999 | | |
| | 05 \$4,000 - \$4,999 | | |
| | 06 \$5,000 - \$9,999 | | |
| | 07 \$10,000 - \$14,999 | | |
| | 08 \$15,000 - \$19,999 | | |
| | 09 \$20,000 - \$29,999 | | |
| | 10 \$30,000 - \$39,999 | | |
| | 11 \$40,000 - \$49,999 | | |
| | 12 \$50,000 and over | | |
| | S 22B 9i | | |
| ALIOTHB_ | | 4736 | CHAR(1) |
| ALIOTHBX | Median of bracket range of ALIOTHB | 4737 | NUM(6) |
| | BLS derived | | |
| ALIO_HBX | | 4743 | CHAR(1) |
| OTHRINCX | During the past 12 months, what was the total amount of other money income including money received from cash scholarships and fellowships, stipends not based on working, or from the care of foster children received by ALL CU members? | 615 | NUM(8) |
| | S 22B 12b | | |
| OTHR_NCX | | 623 | CHAR(1) |
| OTHRINCB | Bracketed variable for OTHRINCX | 4764 | CHAR(2) |
| | CODED | | |
| | 01 \$0 - \$999 | | |
| | 02 \$1,000 - \$1,999 | | |
| | 03 \$2,000 - \$2,999 | | |
| | 04 \$3,000 - \$3,999 | | |
| | 05 \$4,000 - \$4,999 | | |
| | 06 \$5,000 - \$9,999 | | |
| | 07 \$10,000 - \$14,999 | | |
| | 08 \$15,000 - \$19,999 | | |
| | 09 \$20,000 - \$29,999 | | |
| | 10 \$30,000 - \$39,999 | | |
| | 11 \$40,000 - \$49,999 | | |
| | 12 \$50,000 and over | | |
| | S 22B 12c | | |
| OTHR_NCB | | 4766 | CHAR(1) |

| | | | |
|----------|--|------|---------|
| OTRINCBX | Median of bracket range of OTHRINCB BLS derived | 4767 | NUM(6) |
| OTRI_CBX | | 4773 | CHAR(1) |
| FOODSMPQ | Number of months, during the last 12 months, food stamps received S 22B 7b | 4674 | NUM(2) |
| FOOD_MPQ | | 4676 | CHAR(1) |
| FOODSMPX | Value of all food stamps and electronic benefits received S 22B 7c | 4677 | NUM(6) |
| FOOD_MPX | | 4683 | CHAR(1) |
| FOODSMPB | Bracketed variable for FOODSMPX CODED 01 \$0 - \$999 02 \$1,000 - \$1,999 03 \$2,000 - \$2,999 04 \$3,000 - \$3,999 05 \$4,000 - \$4,999 06 \$5,000 - \$9,999 07 \$10,000 - \$14,999 08 \$15,000 - \$19,999 09 \$20,000 - \$29,999 10 \$30,000 - \$39,999 11 \$40,000 - \$49,999 12 \$50,000 and over S 22B 7d | 4684 | CHAR(2) |
| FOOD_MPB | | 4686 | CHAR(1) |
| FOODSPBX | Median of bracket range of FOODSMPB BLS derived | 4687 | NUM(6) |
| FOOD_PBX | | 4693 | CHAR(1) |

f. OTHER MONEY RECEIPTS

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|----------|---|----------------|---------|
| NONINCMX | Amount of other money receipts excluded from CU income before taxes received by CU in past 12 months (LUMPSUMX + LMPSUMBX + SALEINCX + SALINCXBX + SSOVERPX + INSRFNDX + PTAXRFDX + CHDLMPX + CHDLMBX) BLS derived | 572 | NUM(8) |
| NONI_CMX | | 580 | CHAR(1) |
| LUMPSUMX | During the past 12 months, what was the total amount received from lump sum payments from estates, trusts, royalties, alimony, prizes, games of chance, or from persons outside of the CU by ALL CU members? S 22B 10b | 527 | NUM(8) |
| LUMP_UMX | | 535 | CHAR(1) |
| LUMPSUMB | Bracketed variable for LUMPSUMX CODED 01 \$0 - \$999 02 \$1,000 - \$1,999 03 \$2,000 - \$2,999 04 \$3,000 - \$3,999 05 \$4,000 - \$4,999 06 \$5,000 - \$9,999 07 \$10,000 - \$14,999 08 \$15,000 - \$19,999 09 \$20,000 - \$29,999 10 \$30,000 - \$39,999 11 \$40,000 - \$49,999 12 \$50,000 and over S 22B 10c | 4744 | CHAR(2) |
| LUMP_UMB | | 4746 | CHAR(1) |
| LMPSUMBX | Median of bracket range of LUMPSUMB BLS derived | 4747 | NUM(6) |
| LMPS_MBX | | 4753 | CHAR(1) |
| CHDLMPX | During the past 12 months, what was the total amount received from a one time lump sum payment for child support by ALL CU members? S 22B 9b | 3347 | NUM(8) |

| | | | |
|----------|---|------|---------|
| CHDLMPX_ | | 3355 | CHAR(1) |
| CHDLMPB | Bracketed variable for CHDLMPX | 4714 | CHAR(2) |
| | CODED | | |
| | 01 \$0 - \$999 | | |
| | 02 \$1,000 - \$1,999 | | |
| | 03 \$2,000 - \$2,999 | | |
| | 04 \$3,000 - \$3,999 | | |
| | 05 \$4,000 - \$4,999 | | |
| | 06 \$5,000 - \$9,999 | | |
| | 07 \$10,000 - \$14,999 | | |
| | 08 \$15,000 - \$19,999 | | |
| | 09 \$20,000 - \$29,999 | | |
| | 10 \$30,000 - \$39,999 | | |
| | 11 \$40,000 - \$49,999 | | |
| | 12 \$50,000 and over | | |
| | S 22B 9c | | |
| CHDLMPB_ | | 4716 | CHAR(1) |
| CHDLMPBX | Median of bracket range of CHDLMPB | 4717 | NUM(6) |
| | BLS derived | | |
| CHDL_PBX | | 4723 | CHAR(1) |
| SALEINCX | During the past 12 months, what was the total amount received from the sale of household furnishings, equipment, clothing, jewelry, pets or other belongings, excluding the sale of vehicles or property by ALL CU members? | 687 | NUM(8) |
| | S 22B 11b | | |
| SALE_NCX | | 695 | CHAR(1) |
| SALEINCB | Bracketed variable for SALEINCX | 4754 | CHAR(2) |
| | CODED | | |
| | 01 \$0 - \$999 | | |
| | 02 \$1,000 - \$1,999 | | |
| | 03 \$2,000 - \$2,999 | | |
| | 04 \$3,000 - \$3,999 | | |
| | 05 \$4,000 - \$4,999 | | |
| | 06 \$5,000 - \$9,999 | | |
| | 07 \$10,000 - \$14,999 | | |
| | 08 \$15,000 - \$19,999 | | |
| | 09 \$20,000 - \$29,999 | | |
| | 10 \$30,000 - \$39,999 | | |
| | 11 \$40,000 - \$49,999 | | |
| | 12 \$50,000 and over | | |
| | S 22B 11c | | |

| | | | |
|----------|--|------|---------|
| SALE_NCB | | 4756 | CHAR(1) |
| SALINCBX | Median of bracket range of SALEINCB | 4757 | NUM(6) |
| | BLS derived | | |
| SALI_CBX | | 4763 | CHAR(1) |
| SSOVERPX | During the past 12 months, what was the total amount of refund received from overpayment on Social Security by ALL CU members? | 761 | NUM(8) |
| | S 22B 13c | | |
| SSOV_RPX | | 769 | CHAR(1) |
| INSRFNDX | During the past 12 months, what was the total amount of refund received from insurance policies by ALL CU members? | 488 | NUM(8) |
| | S 22B 13d | | |
| INSR_NDX | | 496 | CHAR(1) |
| PTAXRFDX | During the past 12 months, what was the total amount of refund received from property taxes by ALL CU members? | 643 | NUM(8) |
| | S 22B 13e | | |
| PTAX_FDX | | 651 | CHAR(1) |

g. TAXES

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|---|-----------------------|---------------|
| TOTTXPDX | Amount of personal taxes paid by CU in past 12 months (FAMTFEDX + FSLTAXX + FEDTAXX + SLOCTAXX + TAXPROPX + MISCTAXX - (FEDRFNDX + SLRFUNDX + OTHRFNDX)) *L BLS derived | 781 | NUM(9) |
| TOTT_PDX | | 790 | CHAR(1) |
| FAMTFEDX | Amount of Federal income tax deducted from last pay annualized for all CU members (sum ANFEDTX from MEMB file for all CU members) BLS derived | 247 | NUM(8) |
| FAMT_EDX | | 255 | CHAR(1) |

| | | | |
|-----------|---|-----|---------|
| FEDTAXX | During the past 12 months, what was the total amount PAID for Federal income tax, in addition to that withheld from earnings, by ALL CU members? S 22B 14a | 265 | NUM(8) |
| FEDTAXX_ | | 273 | CHAR(1) |
| FEDRFNDX | During the past 12 months, what was the total amount of refund received from Federal income tax by ALL CU members? S 22B 13a | 256 | NUM(8) |
| FEDR_NDX | | 264 | CHAR(1) |
| FSLTAXX | Amount of state and local income taxes deducted from last pay annualized for all CU members (sum ANSLTX from MEMB file for all CU members) BLS derived | 397 | NUM(8) |
| FSLTAXX_ | | 405 | CHAR(1) |
| SLOCTAXX | During the past 12 months, what was the total amount PAID for state and local income taxes, in addition to that withheld from earnings, by ALL CU members? S 22B 14b | 742 | NUM(8) |
| SLOC_AXX | | 750 | CHAR(1) |
| SLRFUNDX | During the past 12 months, what was the total amount of refund received from state and local income tax by ALL CU members? S 22B 13b | 751 | NUM(8) |
| SLRF_NDX | | 759 | CHAR(1) |
| *TAXPROPX | During the past 12 months, what was the total amount PAID for personal property taxes for vehicles by ALL CU members? S 22B 14c | 772 | NUM(8) |
| TAXP_OPX | | 780 | CHAR(1) |
| *MISCTAXX | During the past 12 months, what was the total amount PAID for personal property taxes and other taxes not reported elsewhere by ALL CU members? S 22B 14d | 515 | NUM(8) |
| MISC_AXX | | 523 | CHAR(1) |

| | | | |
|----------|--|-----|---------|
| OTHRFNDX | During the past 12 months, what was the total amount of refund received from other sources, including any other taxes, by ALL CU members? S 22B 13f | 606 | NUM(8) |
| OTHR_NDX | | 614 | CHAR(1) |

h. RETIREMENT AND PENSION DEDUCTIONS

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|--|-----------------------|---------------|
| FJSSDEDX | Estimated amount of income contributed to Social Security by all CU members in past 12 months (sum JSSDEDX from MEMB file for all CU members) BLS derived | 342 | NUM(8) |
| FJSS_EDX | | 350 | CHAR(1) |
| FRRDEDX | Amount of Railroad Retirement deducted from last pay annualized for all CU members (sum ANRRDEDX from MEMB file for all CU members) BLS derived | 370 | NUM(8) |
| FRRDEDX_ | | 378 | CHAR(1) |
| FGOVRETX | Amount of government retirement deducted from last pay annualized for all CU members (sum ANGOVRTX from MEMB file for all CU members) BLS derived | 284 | NUM(8) |
| FGOV_ETX | | 292 | CHAR(1) |
| FPRIPENX | Amount of private pensions deducted from last pay annualized for all CU members (sum ANPRVPNX from MEMB file for all CU members) BLS derived | 361 | NUM(8) |
| FPRI_ENX | | 369 | CHAR(1) |
| FINDRETX | Amount of money placed in an individual retirement plan, such as an IRA or Keogh, by all CU members in past 12 months (sum INDRETX from MEMB file for all CU members) BLS derived | 313 | NUM(8) |
| FIND_ETX | | 321 | CHAR(1) |

j. **FINANCIAL INFORMATION** (only collected in the 5th interview)

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|--|-----------------------|---------------|
| SAVACCTX | On the last day of (<i>last month</i>), what was the total amount your CU had in savings accounts in banks, savings and loans, credit unions, and similar accounts? S22G.S 1a | 696 | NUM(10) |
| SAVA_CTX | | 706 | CHAR(1) |
| COMPSAV | How does the amount your CU had at the end of the last day of (<i>last month</i>) compare with the amount your CU had on the last day of (<i>last month, one year ago</i>) in savings accounts? CODED 1 Same 2 More 3 Less S22G.S 2a | 185 | CHAR(1) |
| COMPSAV_ | | 186 | CHAR(1) |
| COMPSAVX | How much more (less) in savings accounts? *L S22G.S 2a | 187 | NUM(8) |
| COMP_AVX | | 195 | CHAR(1) |
| CKBKACTX | On the last day of (<i>last month</i>), what was the total amount your CU had in checking accounts, brokerage accounts and other similar accounts? S22G.S 1b | 85 | NUM(10) |
| CKBK_CTX | | 95 | CHAR(1) |
| COMPCKG | How does the amount your CU had at the end of the last day of (<i>last month</i>) compare with the amount your CU had on the last day of (<i>last month, one year ago</i>) in checking accounts? CODED 1 Same 2 More 3 Less S22G.S 2b | 154 | CHAR(1) |
| COMPCKG_ | | 155 | CHAR(1) |

| | | | |
|----------|---|-----|---------|
| COMPCKGX | How much more (less) in checking accounts? *L S22G.S 2b | 156 | NUM(8) |
| COMP_KGX | | 164 | CHAR(1) |
| USBNDX | On the last day of (<i>last month</i>), what was the total amount your CU had in U.S. Savings bonds? S22G.S 1c | 800 | NUM(8) |
| USBNDX_ | | 808 | CHAR(1) |
| COMPBND | How does the amount your CU had at the end of the last day of (<i>last month</i>) compare with the amount your CU had on the last day of (<i>last month, one year ago</i>) in U.S. Savings bonds? CODED 1 Same 2 More 3 Less S22G.S 2c | 143 | CHAR(1) |
| COMPBND_ | | 144 | CHAR(1) |
| COMPBNDX | How much more (less) in U.S. Savings bonds? *L S22G.S 2c | 145 | NUM(8) |
| COMP_NDX | | 153 | CHAR(1) |
| SECESTX | What was the estimated value of securities, such as stocks, mutual funds, private bonds, government bonds or Treasury notes owned by you (or any members of your CU) on the last day of (<i>last month</i>)? S22G.S 3b | 707 | NUM(10) |
| SECESTX_ | | 717 | CHAR(1) |
| COMPSEC | How does this compare with the value of such securities your CU held on the last day of (<i>last month, one year ago</i>)? CODED 1 Same 2 More 3 Less S22G.S 3c | 196 | CHAR(1) |
| COMPSEC_ | | 197 | CHAR(1) |

| | | | |
|----------|---|-----|---------|
| COMPSECX | How much more (less) is the estimated value of such securities? *L | 198 | NUM(8) |
| | S22G.S 3c | | |
| COMP_ECX | | 206 | CHAR(1) |
| PURSSECX | During the past 12 months, what was the purchase price including broker fees of any stocks, mutual funds or bonds bought by you (or any members of your CU)? | 654 | NUM(8) |
| | S22G.S 4 | | |
| PURS_ECX | | 662 | CHAR(1) |
| SELLSECX | During the past 12 months, what was the net amount received from sales of any stocks, mutual funds or bonds after subtracting broker fees by you (or any members of your CU)? | 718 | NUM(10) |
| | S22G.S 5 | | |
| SELL_ECX | | 728 | CHAR(1) |
| BSINVSTX | During the past 12 months, how much did you (or any members of your CU) invest in your own business or farm? | 50 | NUM(10) |
| | S22G.S 6 | | |
| BSIN_STX | | 60 | CHAR(1) |
| WDBSASTX | During the past 12 months, what was the value of any assets you (or any members of your CU) withdrew from your own business or farm? | 812 | NUM(10) |
| | S22G.S 7 | | |
| WDBS_STX | | 822 | CHAR(1) |
| WDBSGDSX | During the past 12 months, what was the value of any goods or services you (or any members of your CU) withdrew from your own farm or business for personal use? | 823 | NUM(8) |
| | S22G.S 8b | | |
| WDBS_DSX | | 831 | CHAR(1) |
| MONYOWDX | How much was owed by anyone outside of your CU to you or any member of your CU on the last day of (<i>last month, one year ago</i>)? | 547 | NUM(8) |
| | S22G.S 10 | | |
| MONY_WDX | | 555 | CHAR(1) |

| | | | |
|----------|---|-----|---------|
| COMPOWD | How does the amount owed to your CU on the last day of (<i>last month</i>) compare with the amount owed to your CU by persons outside your CU on the last day of (<i>last month, one year ago</i>)? CODED 1 Same 2 More 3 Less S22G.S 9b | 174 | CHAR(1) |
| COMPOWD_ | | 175 | CHAR(1) |
| COMPOWDX | How much more (less) is owed to your CU by persons outside your CU? *L S22G.S 9b | 176 | NUM(8) |
| COMP_WDX | | 184 | CHAR(1) |
| SETLINSX | During the past 12 months, how much did you (or any members of your CU) receive in settlement on surrender of any insurance policies (life or annuity)? S22G.S 11 | 729 | NUM(8) |
| SETL_NSX | | 737 | CHAR(1) |

k. HOUSING STRUCTURE

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|----------|--|----------------|---------|
| BUILDING | Which best describes this building? CODED 01 Single family detached (detached structure with only one primary residence; however, the structure could include a rental unit(s) in the basement, attic, etc.) 02 Row or townhouse inner unit (2, 3 or 4 story structure with 2 walls in common with other units and a private ground level entrance; it may have a rental unit as part of structure) 03 End row or end townhouse (one common wall) 04 Duplex (detached two unit structure with one common wall between the units) 05 3-plex or 4-plex (3 or 4 unit structure with all units occupying the same level or levels) 06 Garden (a multi-unit structure, usually wider than it is high, having 2, 3, or possibly 4 floors; characteristically the units not only have common walls but are also stacked on top of one another) 07 High-rise (a multi-unit structure which has 4 or more floors) 08 Apartment or flat (a unit not described above; could be located in the basement, attic, second floor or over the garage of one of the units described above) 09 Mobile home or trailer 10 College dormitory 11 Other S01B 3 | 61 | CHAR(2) |
| BUIL_ING | | 63 | CHAR(1) |
| UNISTRQ | How many housing units, both occupied and vacant, are in this structure? Coded: 01 Only OTHER units 02 Mobile home or trailer 03 One, detached 04 One, attached 05 2 06 3-4 07 5-9 08 10-19 09 20-49 10 50 or more Control Card 15 | 4606 | CHAR(2) |
| UNISTRQ_ | | 4608 | CHAR(1) |

| | | | |
|----------|--|------|---------|
| LOT_SIZE | What is the approximate size of the lot on which this unit is located? CODED 01 1 acre or less 02 2 acres 03 3 to 5 acres 04 6 to 10 acres 05 greater than 10 acres 06 No lot S01B 4 | 524 | CHAR(2) |
| LOT__IZE | | 526 | CHAR(1) |
| YRBUILT | About when was this building originally built? S 01B 10 | 4609 | CHAR(4) |
| YRBUILT_ | | 4613 | CHAR(1) |
| ST_HOUS | Are these living quarters presently used as student housing by a college or university? CODED 1 Yes 2 No S01B 2 | 770 | CHAR(1) |
| ST_HOUS_ | | 771 | CHAR(1) |
| PUBLHOUS | Is this house in a public housing project, that is, is it owned by a local housing authority or other local public agency? CODED 1 Yes 2 No S01B 1a | 652 | CHAR(1) |
| PUBL_OUS | | 653 | CHAR(1) |
| GOVTCOST | Are your housing costs lower because the Federal, State, or local government is paying part of the cost? (PUBLHOUS = 2) CODED 1 Yes 2 No S01B 1b | 421 | CHAR(1) |
| GOVT_OST | | 422 | CHAR(1) |

| | | | |
|----------|---|------|---------|
| DIRACC | Access to living quarters CODED 1 Direct access to living quarters 2 Access through another housing unit Control Card 14b | 9 | CHAR(1) |
| DIRACC_ | | 10 | CHAR(1) |
| ROOMSQ | How many rooms are there in this unit, including finished living areas and excluding all baths? S01B 5 | 683 | NUM(3) |
| ROOMSQ_ | | 686 | CHAR(1) |
| BEDROOMQ | How many bedrooms are there in this unit? S01B 6 | 45 | NUM(3) |
| BEDR_OMQ | | 48 | CHAR(1) |
| BATHRMQ | How many complete bathrooms are there in this unit? S01B 7a | 41 | NUM(3) |
| BATHRMQ_ | | 44 | CHAR(1) |
| HLFBATHQ | How many half bathrooms are there in this unit? S01B 7b | 423 | NUM(3) |
| HLFB_THQ | | 426 | CHAR(1) |
| HEATFUEL | What fuel is used most for heating this unit? CODED 01 Gas (underground pipes) 02 Electricity 03 Fuel oil 04 Other 05 No fuel used S01B 8a | 3292 | CHAR(2) |
| HEAT_UEL | | 3294 | CHAR(1) |

| | | | |
|----------|---|------|---------|
| WATERHT | What fuel is used for heating water in this unit? | 3307 | CHAR(2) |
| | CODED | | |
| | 01 Gas (underground pipes) | | |
| | 06 Electricity | | |
| | 07 Fuel oil | | |
| | 08 Other | | |
| | 09 No fuel used | | |
| | S01B 8b | | |
| WATERHT_ | | 3309 | CHAR(1) |
| COOKING | What fuel is used most for cooking? | 4200 | CHAR(2) |
| | CODED | | |
| | 01 Gas (underground piping) | | |
| | 02 Electricity | | |
| | 03 Fuel oil | | |
| | 04 Other fuel | | |
| | 05 No fuel used | | |
| | S01B 8a | | |
| COOKING_ | | 4202 | CHAR(1) |
| SWIMPOOL | Does this unit have any of the following? | 3298 | CHAR(2) |
| | CODED | | |
| | 01 Swimming pool | | |
| | S01B 9 | | |
| SWIM_OOL | | 3300 | CHAR(1) |
| PORCH | Does this unit have any of the following? | 4203 | CHAR(2) |
| | CODED | | |
| | 03 Porch, terrace, patio, or balcony | | |
| | S01B 9 | | |
| PORCH_ | | 4205 | CHAR(1) |
| APTMENT | See SWIMPOOL for question and source. | 3310 | CHAR(2) |
| | CODED | | |
| | 04 Apartment or guest house | | |
| APTMENT_ | | 3312 | CHAR(1) |
| OFSTPARK | See SWIMPOOL for question and source. | 3313 | CHAR(2) |
| | CODED | | |
| | 02 Off street parking | | |
| OFST_ARK | | 3315 | CHAR(1) |

| | | | |
|----------|---|------|---------|
| WINDOWAC | See SWIMPOOL for question and source. CODED 06 Window air conditioning | 3316 | CHAR(2) |
| WIND_WAC | | 3318 | CHAR(1) |
| CNTRALAC | See SWIMPOOL for question and source. CODED 05 Central air conditioning | 3319 | CHAR(2) |
| CNTR_LAC | | 3321 | CHAR(1) |
| RENTEQVX | If someone were to rent your home today, how much do you think it would rent for monthly, unfurnished and without utilities? S03I 13 | 674 | NUM(6) |
| RENT_QVX | | 680 | CHAR(1) |

I. WEIGHTS

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|---|-----------------------|---------------|
| FINLWT21 | CU replicate weight #45 (total sample) BLS derived | 331 | NUM(11,3) |

The following are the 44 half sample replicate weights WTREP01 through WTREP44 which are used for variance computations. They are all BLS derived variables.

| | | | |
|---------|--------------------------|-----|-----------|
| WTREP01 | CU replicate weight # 01 | 841 | NUM(11,3) |
| WTREP02 | CU replicate weight # 02 | 852 | NUM(11,3) |
| WTREP03 | CU replicate weight # 03 | 863 | NUM(11,3) |
| WTREP04 | CU replicate weight # 04 | 874 | NUM(11,3) |
| WTREP05 | CU replicate weight # 05 | 885 | NUM(11,3) |
| WTREP06 | CU replicate weight # 06 | 896 | NUM(11,3) |
| WTREP07 | CU replicate weight # 07 | 907 | NUM(11,3) |
| WTREP08 | CU replicate weight # 08 | 918 | NUM(11,3) |
| WTREP09 | CU replicate weight # 09 | 929 | NUM(11,3) |
| WTREP10 | CU replicate weight # 10 | 940 | NUM(11,3) |
| WTREP11 | CU replicate weight # 11 | 951 | NUM(11,3) |

| | | | |
|---------|--------------------------|------|-----------|
| WTREP12 | CU replicate weight # 12 | 962 | NUM(11,3) |
| WTREP13 | CU replicate weight # 13 | 973 | NUM(11,3) |
| WTREP14 | CU replicate weight # 14 | 984 | NUM(11,3) |
| WTREP15 | CU replicate weight # 15 | 995 | NUM(11,3) |
| WTREP16 | CU replicate weight # 16 | 1006 | NUM(11,3) |
| WTREP17 | CU replicate weight # 17 | 1017 | NUM(11,3) |
| WTREP18 | CU replicate weight # 18 | 1028 | NUM(11,3) |
| WTREP19 | CU replicate weight # 19 | 1039 | NUM(11,3) |
| WTREP20 | CU replicate weight # 20 | 1050 | NUM(11,3) |
| WTREP21 | CU replicate weight # 21 | 1061 | NUM(11,3) |
| WTREP22 | CU replicate weight # 22 | 1072 | NUM(11,3) |
| WTREP23 | CU replicate weight # 23 | 1083 | NUM(11,3) |
| WTREP24 | CU replicate weight # 24 | 1094 | NUM(11,3) |
| WTREP25 | CU replicate weight # 25 | 1105 | NUM(11,3) |
| WTREP26 | CU replicate weight # 26 | 1116 | NUM(11,3) |
| WTREP27 | CU replicate weight # 27 | 1127 | NUM(11,3) |
| WTREP28 | CU replicate weight # 28 | 1138 | NUM(11,3) |
| WTREP29 | CU replicate weight # 29 | 1149 | NUM(11,3) |
| WTREP30 | CU replicate weight # 30 | 1160 | NUM(11,3) |
| WTREP31 | CU replicate weight # 31 | 1171 | NUM(11,3) |
| WTREP32 | CU replicate weight # 32 | 1182 | NUM(11,3) |
| WTREP33 | CU replicate weight # 33 | 1193 | NUM(11,3) |
| WTREP34 | CU replicate weight # 34 | 1204 | NUM(11,3) |
| WTREP35 | CU replicate weight # 35 | 1215 | NUM(11,3) |
| WTREP36 | CU replicate weight # 36 | 1226 | NUM(11,3) |
| WTREP37 | CU replicate weight # 37 | 1237 | NUM(11,3) |
| WTREP38 | CU replicate weight # 38 | 1248 | NUM(11,3) |
| WTREP39 | CU replicate weight # 39 | 1259 | NUM(11,3) |

| | | | |
|---------|--------------------------|------|-----------|
| WTREP40 | CU replicate weight # 40 | 1270 | NUM(11,3) |
| WTREP41 | CU replicate weight # 41 | 1281 | NUM(11,3) |
| WTREP42 | CU replicate weight # 42 | 1292 | NUM(11,3) |
| WTREP43 | CU replicate weight # 43 | 1303 | NUM(11,3) |
| WTREP44 | CU replicate weight # 44 | 1314 | NUM(11,3) |

m. SUMMARY EXPENDITURE DATA

Main Summary Level Expenditure Variables

For each summary expenditure category listed below there are two variables. They apportion expenditures reported for the three-month reference period of the interview to the calendar quarters, relative to the month of interview, in which the expenditures occurred. The first variable contains expenditures made by the CU in the calendar quarter previous to the month of interview. These "previous quarter" expenditure variables are identified by "PQ" placed as the last two letters of the variable name. The second variable contains expenditures made in the calendar quarter of the month of interview (last 2 letters of the variable name 'CQ'). So if CUs were interviewed in May (when they reported their February, March, and April expenditures), the "PQ" variable would contain their February and March expenditures since the previous calendar quarter to a May interview is from January to March. The "CQ" variable for these CUs would contain only their April expenditures. The variables are set up this way to facilitate analysis by calendar time period. For example, to calculate an expenditure category mean for a given calendar quarter, expenditures from the "CQ" variable for interviews conducted during the quarter of interest are added to amounts from the "PQ" variable for interviews conducted during the subsequent quarter prior to dividing by the number of observations. To derive expenditure statistics by collection period, i.e., for interviews conducted during a specific period, it is necessary to obtain all expenditures reported during each interview by summing the "PQ" and "CQ" variables of the desired expenditure category. See Section V.A.1.b. CALENDAR PERIOD VERSUS COLLECTION PERIOD for a detailed explanation of calendar and collection periods.

All of the following summary level variables are BLS derived. The composition of each summary expenditure variable is given below the variable description. An underlined UCC represents either a new UCC or a deleted UCC. Please note that new UCCs may not be represented in all quarters. The quarter in which the addition (deletion) to the summary expenditure variable occurs is denoted by a leading superscript directly prior to the UCC code. For example, ^{N021}<UCC> or ^{D021}<UCC> identifies an addition or deletion of a given UCC to the summary expenditure variable beginning in Q021.

PLEASE NOTE THE FOLLOWING:

MISC2PQ(CQ) contains UCCs that are a subset of those included in MISCPQ(CQ) – miscellaneous expenditures. Component UCCs in MISCPQ(CQ) have been separated according to collection method. UCCs for which the values are obtained from questions asked in interviews 2 through 5 are now in MISC1PQ(CQ), while MISC2PQ(CQ) contains those UCCs from questions asked only in the fifth interview. To obtain population or sample estimates, the summary variable MISCX4PQ(CQ) has been created. It is comprised of MISC1PQ(CQ) expenditures and MISC2PQ(CQ) expenditures that have been multiplied by four, in order to account for families not in their fifth interviews. Similarly, TOTEX4PQ(CQ) reflects the adjustments for "non-fifth interview" families in MISC2PQ(CQ) and CASHCOPQ(CQ). Please be aware that for 2001Q1 MISCX4CQ(PQ) and TOTEX4PQ(CQ) overestimate

the values of CASHCOPQ(CQ) and a portion of MISC2PQ(CQ) for “fifth interview” CUs and should only be used for population estimates.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|--|--|----------------|-----------|
| TOTEXPPQ | Total expenditures last quarter (FOODPQ + ALCBEVPQ + HOUSPQ + APPARPQ + TRANSPQ + HEALTHPQ + ENTERTPQ + PERSCAPQ + READPQ + EDUCAPQ + TOBACCPQ + MISCPQ + CASHCOPQ + PERINSPQ) | 1325 | NUM(12,4) |
| TOTEXPCQ | Total expenditures this quarter same composition as above | 1337 | NUM(12,4) |
| TOTEX4PQ | Adjusted total expenditures last quarter <i>(To be used for population estimates - see information under Summary Expenditure Data heading.)</i> TOTEXPPQ - MISCPQ + MISC1PQ + 4*(MISC2PQ) | 3387 | NUM(12,4) |
| TOTEX4CQ | Adjusted total expenditures this quarter collected in Interview Survey <i>(To be used for population estimates - see information under Summary Expenditure Data heading.)</i> same composition as above | 3399 | NUM(12,4) |
| <p><i>NOTE: *TOTEXPPQ, *TOTEXPCQ, *TOTEX4PQ, and *TOTEX4CQ, totals exclude items which are only collected in the Diary Survey. See Section VIII for a further explanation.</i></p> | | | |
| FOODPQ | Total food last quarter FDHOMEPQ + FDAWAYPQ | 1349 | NUM(12,4) |
| FOODCQ | Total food this quarter same composition as above | 1361 | NUM(12,4) |
| FDHOMEPQ | Food at home last quarter 190904 790220 790230 | 1373 | NUM(12,4) |
| FDHOMECPQ | Food at home this quarter same UCCs as above | 1385 | NUM(12,4) |
| FDAWAYPQ | Food away from home last quarter FDXMAPPQ + FDMAPPQ | 1397 | NUM(12,4) |
| FDAWAYCQ | Food away from home this quarter same composition as above | 1409 | NUM(12,4) |
| FDXMAPPQ | Food away excluding meals as pay last quarter 190901 190902 190903 790410 790430 | 1421 | NUM(12,4) |

| | | | |
|----------|--|------|-----------|
| FDXMAPCQ | Food away excluding meals as pay this quarter same UCCs as above | 1433 | NUM(12,4) |
| FDMAPPQ | Meals as pay last quarter 800700 | 1445 | NUM(12,4) |
| FDMAPCQ | Meals as pay this quarter same UCC as above | 1457 | NUM(12,4) |
| ALCBEVPQ | Alcoholic beverages last quarter 200900 790310 790320 790420 | 1469 | NUM(12,4) |
| ALCBEVCQ | Alcoholic beverages this quarter same UCCs as above | 1481 | NUM(12,4) |
| HOUSPQ | Housing last quarter SHELTPQ + UTILPQ + HOUSOPPQ + HOUSEQPQ | 1493 | NUM(12,4) |
| HOUSCQ | Housing this quarter same composition as above | 1505 | NUM(12,4) |
| SHELTPQ | Shelter last quarter OWNDWEPQ + RENDWEPQ + OTHLODPQ | 1517 | NUM(12,4) |
| SHELTCQ | Shelter this quarter same composition as above | 1529 | NUM(12,4) |
| OWNDWEPQ | Owned dwellings last quarter MRTINTPQ + PROPTXPQ + MRPINSPQ | 1541 | NUM(12,4) |
| OWNDWECQ | Owned dwellings this quarter same composition as above | 1553 | NUM(12,4) |
| MRTINTPQ | Mortgage interest last quarter 220311 220313 220321 880110 | 1565 | NUM(12,4) |
| MRTINTCQ | Mortgage interest this quarter same UCCs as above | 1577 | NUM(12,4) |
| PROPTXPQ | Property taxes last quarter 220211 | 1589 | NUM(12,4) |
| PROPTXCQ | Property taxes this quarter same UCC as above | 1601 | NUM(12,4) |
| MRPINSPQ | Maintenance, repairs, insurance, and other expenses last quarter 210901 220121 220901 230112 230113 230114 230115 230122 230142 230151 230901 240112 240122 240212 240213 240222 240312 240322 320612 320622 320632 340911 990930 | 1613 | NUM(12,4) |
| MRPINSCQ | Maintenance, repairs, insurance, and other expenses this quarter same UCCs as above | 1625 | NUM(12,4) |

| | | | |
|----------|--|------|-----------|
| RENDWEPQ | Rented dwelling last quarter RNTXRPPQ + RNTAPYPQ | 1637 | NUM(12,4) |
| RENDWECQ | Rented dwellings this quarter same composition as above | 1649 | NUM(12,4) |
| RNTXRPPQ | Rent excluding rent as pay last quarter 210110 230121 230141 230150 240111 240121 240211 240221 240311 240321 320611 320621 320631 350110 790690 990920 | 1661 | NUM(12,4) |
| RNTXRPCQ | Rent excluding rent as pay this quarter same UCCs as above | 1673 | NUM(12,4) |
| RNTAPYPQ | Rent as pay last quarter 800710 | 1685 | NUM(12,4) |
| RNTAPYCQ | Rent as pay this quarter same UCC as above | 1697 | NUM(12,4) |
| OTHLODPQ | Other lodging last quarter 210210 210310 210902 220122 220212 220312 220314 220322 220902 230123 230152 230902 240113 240123 240214 240223 240313 240323 320613 320623 320633 340912 880310 990940 | 1709 | NUM(12,4) |
| OTHLODCQ | Other lodging this quarter same UCCs as above | 1721 | NUM(12,4) |
| UTILPQ | Utilities, fuels and public services last quarter NTLGASPQ + ELCTRCPQ + ALLFULPQ + TELEPHPQ + WATRPSPQ | 1733 | NUM(12,4) |
| UTILCQ | Utilities, fuels and public services this quarter same composition as above | 1745 | NUM(12,4) |
| NTLGASPQ | Natural gas last quarter 260211 260212 260213 260214 | 1757 | NUM(12,4) |
| NTLGASCQ | Natural gas this quarter same UCCs as above | 1769 | NUM(12,4) |
| ELCTRCPQ | Electricity last quarter 260111 260112 260113 260114 | 1781 | NUM(12,4) |
| ELCTRCCQ | Electricity this quarter same UCCs as above | 1793 | NUM(12,4) |
| ALLFULPQ | Fuel oil and other fuels last quarter FULOILPQ + OTHFLSPQ | 1805 | NUM(12,4) |
| ALLFULCQ | Fuel oil and other fuels this quarter same composition as above | 1817 | NUM(12,4) |

| | | | |
|-----------|--|------|-----------|
| FULOILPQ | Fuel oil last quarter 250111 250112 250113 250114 | 1829 | NUM(12,4) |
| FULOILCQ | Fuel oil this quarter same UCCs as above | 1841 | NUM(12,4) |
| OTHFLSPQ | Other fuels last quarter 250211 250212 250213 250214 250221 250222 250223 250224 250901 250902 250903 250904 | 1853 | NUM(12,4) |
| OTHFLSCQ | Other fuels this quarter same UCCs as above | 1865 | NUM(12,4) |
| TELEPHPQ | Telephone services last quarter 270101 270102 270103 270104 | 1877 | NUM(12,4) |
| TELEPHCQ | Telephone services this quarter same UCCs as above | 1889 | NUM(12,4) |
| WATRPSPQ | Water and other public services last quarter 270211 270212 270213 270214 270411 270412 270413 270414 270901 270902 270903 270904 | 1901 | NUM(12,4) |
| WATRPSCQ | Water and other public services this quarter same UCCs as above | 1913 | NUM(12,4) |
| HOUSOPPQ | Household operations last quarter DOMSRVPQ + OTHHEXPQ | 1925 | NUM(12,4) |
| HOUSOPCQ | Household operations this quarter same composition as above | 1937 | NUM(12,4) |
| DOMSRVPQ | Domestic services last quarter DMSXCCPQ + BBYDAYPQ | 1949 | NUM(12,4) |
| DOMSRVCQ | Domestic services this quarter same composition as above | 1961 | NUM(12,4) |
| *DMSXCCPQ | Domestic services excluding child care last quarter 340310 340410 340420 340520 340530 340903 340906 340910 340914 ^{N021} <u>340915</u> | 1973 | NUM(12,4) |
| DMSXCCCQ | Domestic services excluding child care this quarter same UCCs as above | 1985 | NUM(12,4) |
| BBYDAYPQ | Babysitting and child day care last quarter 340211 340212 670310 | 1997 | NUM(12,4) |
| BBYDAYCQ | Babysitting and child day care this quarter same UCCs as above | 2009 | NUM(12,4) |
| *OTHHEXPQ | Other household expenses last quarter 330511 340510 340620 340630 340901 340907 340908 690113 690114 990900 ^{D021} <u>340915</u> | 2021 | NUM(12,4) |

| | | | |
|----------|--|------|-----------|
| OTHHEXCQ | Other household expenses this quarter same UCCs as above | 2033 | NUM(12,4) |
| HOUSEQPQ | Housefurnishings and equipment last quarter TEXTILPQ + FURNTRPQ + FLRCVRPQ + MAJAPPPQ + SMLAPPPQ + MISCEQPQ | 2045 | NUM(12,4) |
| HOUSEQCQ | Housefurnishings and equipment this quarter same composition as above | 2057 | NUM(12,4) |
| TEXTILPQ | Household textiles last quarter 280110 280120 280130 280210 280220 280230 280900 | 2069 | NUM(12,4) |
| TEXTILCQ | Household textiles this quarter same UCCs as above | 2081 | NUM(12,4) |
| FURNTRPQ | Furniture last quarter 290110 290120 290210 290310 290320 290410 290420 290430 290440 | 2093 | NUM(12,4) |
| FURNTRCQ | Furniture this quarter same UCCs as above | 2105 | NUM(12,4) |
| FLRCVRPQ | Floor coverings last quarter 230133 230134 320111 320163 | 2117 | NUM(12,4) |
| FLRCVRCQ | Floor coverings this quarter same UCCs as above | 2129 | NUM(12,4) |
| MAJAPPPQ | Major appliances last quarter 230117 230118 300111 300112 300211 300212 300221 300222 300311 300312 300321 300322 300331 300332 300411 300412 320511 320512 | 2141 | NUM(12,4) |
| MAJAPPCQ | Major appliances this quarter same UCCs as above | 2153 | NUM(12,4) |
| SMLAPPPQ | Small appliances, miscellaneous housewares last quarter 320310 320320 320330 320340 320350 320360 320370 320521 320522 | 2165 | NUM(12,4) |
| SMLAPPCQ | Small appliances, miscellaneous housewares this quarter same UCCs as above | 2177 | NUM(12,4) |
| MISCEQPQ | Miscellaneous household equipment last quarter 320120 320130 320150 320210 320220 320231 320232 320410 320420 320901 320902 320903 320904 340904 430130 690111 690112 690210 690220 690230 690241 690242 690243 690244 690245 | 2189 | NUM(12,4) |
| MISCEQCQ | Miscellaneous household equipment this quarter | 2201 | NUM(12,4) |

| | | | |
|----------|---|------|-----------|
| | same UCCs as above | | |
| APPARPQ | Apparel and services last quarter MENBOYPQ + WOMGRLPQ + CHLDRNPQ + FOOTWRPQ + OTHAPLPQ | 2213 | NUM(12,4) |
| APPARCQ | Apparel and services this quarter Same composition as above | 2225 | NUM(12,4) |
| MENBOYPQ | Clothing for men and boys last quarter MENSIXPQ + BOYFIFPQ | 2237 | NUM(12,4) |
| MENBOYCQ | Clothing for men and boys this quarter same composition as above | 2249 | NUM(12,4) |
| MENSIXPQ | Clothing for men, 16 and over last quarter 360110 360120 360210 360311 360312 360320 360330 360340 360350 360410 360511 360512 360901 360902 | 2261 | NUM(12,4) |
| MENSIXCQ | Clothing for men, 16 and over this quarter same UCCs as above | 2273 | NUM(12,4) |
| BOYFIFPQ | Clothing for boys, 2 to 15 last quarter 370110 370120 370130 370211 370212 370213 370220 370311 370312 370313 370902 370903 370904 | 2285 | NUM(12,4) |
| BOYFIFCQ | Clothing for boys, 2 to 15 this quarter same UCCs as above | 2297 | NUM(12,4) |
| WOMGRLPQ | Clothing for women and girls last quarter WOMSIXPQ + GRLFIFPQ | 2309 | NUM(12,4) |
| WOMGRLCQ | Clothing for women and girls this quarter same composition as above | 2321 | NUM(12,4) |
| WOMSIXPQ | Clothing for women, 16 and over last quarter 380110 380210 380311 380312 380313 380320 380331 380332 380340 380410 380420 380430 380510 380901 380902 380903 | 2333 | NUM(12,4) |
| WOMSIXCQ | Clothing for women, 16 and over this quarter same UCCs as above | 2345 | NUM(12,4) |
| GRLFIFPQ | Clothing for girls, 2 to 15 last quarter 390110 390120 390210 390221 390222 390230 390310 390321 390322 390901 390902 | 2357 | NUM(12,4) |
| GRLFIFCQ | Clothing for girls, 2 to 15 this quarter same UCCs as above | 2369 | NUM(12,4) |
| CHLDRNPQ | Clothing for children under 2 last quarter 410110 410120 410130 410140 410901 | 2381 | NUM(12,4) |
| CHLDRNCQ | Clothing for children under 2 this quarter | 2393 | NUM(12,4) |

| | | | |
|----------|---|------|-----------|
| | same UCCs as above | | |
| FOOTWRPQ | Footwear last quarter 400110 400210 400220 400310 | 2405 | NUM(12,4) |
| FOOTWRCQ | Footwear this quarter same UCCs as above | 2417 | NUM(12,4) |
| OTHAPLPQ | Other apparel products and services last quarter 420110 420120 430110 430120 440110 440120 440130 440140 440150 440210 440900 | 2429 | NUM(12,4) |
| OTHAPLCQ | Other apparel products and services this quarter same UCCs as above | 2441 | NUM(12,4) |
| TRANSPQ | Transportation last quarter CARTKNPQ + CARTKUPQ + OTHVEHPQ + GASMOPQ + VEHFNPQ + MAINRPPQ + VEHINSPQ + VRNTLOPQ + PUBTRAPQ | 2453 | NUM(12,4) |
| TRANSCQ | Transportation this quarter same composition as above | 2465 | NUM(12,4) |
| CARTKNPQ | Cars and trucks, new (net outlay) last quarter 450110 450210 | 2477 | NUM(12,4) |
| CARTKNCQ | Cars and trucks, new (net outlay) this quarter same UCCs as above | 2489 | NUM(12,4) |
| CARTKUPQ | Cars and trucks, used (net outlay) last quarter 460110 460901 | 2501 | NUM(12,4) |
| CARTKUCQ | Cars and trucks, used (net outlay) this quarter same UCCs as above | 2513 | NUM(12,4) |
| OTHVEHPQ | Other vehicles last quarter 450220 460902 | 2525 | NUM(12,4) |
| OTHVEHCQ | Other vehicles this quarter same UCCs as above | 2537 | NUM(12,4) |
| GASMOPQ | Gasoline and motor oil last quarter 470111 470112 470113 470211 470212 | 2549 | NUM(12,4) |
| GASMOCQ | Gasoline and motor oil this quarter same UCCs as above | 2561 | NUM(12,4) |
| VEHFNPQ | Vehicle finance charges last quarter 510110 510901 510902 850300 | 2573 | NUM(12,4) |
| VEHFNCQ | Vehicle finance charges this quarter same UCCs as above | 2585 | NUM(12,4) |
| MAINRPPQ | Maintenance and repairs last quarter 470220 480110 480213 480214 490110 490211 | 2597 | NUM(12,4) |

| | | | |
|----------|---|------|-----------|
| | 490212 490221 490231 490232 490311 490312 490313 490314 490318 490319 490411 490412 490413 490501 490502 490900 | | |
| MAINRPCQ | Maintenance and repairs this quarter same UCCs as above | 2609 | NUM(12,4) |
| VEHINSPQ | Vehicle insurance last quarter 500110 | 2621 | NUM(12,4) |
| VEHINSCQ | Vehicle insurance this quarter same UCC as above | 2633 | NUM(12,4) |
| VRNTLOPQ | Vehicle rental, leases, licenses, and other charges last quarter 450310 450313 450314 450410 450413 450414 520111 520112 520310 520410 520511 520512 520521 520522 520531 520532 520542 520550 520902 520903 520905 520906 620113 | 2645 | NUM(12,4) |
| VRNTLOCQ | Vehicle rental, leases, licenses, and other charges this quarter same UCCs as above | 2657 | NUM(12,4) |
| PUBTRAPQ | Public transportation last quarter TRNTRPPQ + TRNOTHPQ | 2669 | NUM(12,4) |
| PUBTRACQ | Public transportation this quarter same composition as above | 2681 | NUM(12,4) |
| TRNTRPPQ | Public transportation on trips last quarter 530110 530210 530312 530411 530510 530901 | 2693 | NUM(12,4) |
| TRNTRPCQ | Public transportation on trips this quarter same UCCs as above | 2705 | NUM(12,4) |
| TRNOTHPQ | Local public transportation, excluding on trips last quarter 530311 530412 530902 | 2717 | NUM(12,4) |
| TRNOTHCQ | Local public transportation, excluding on trips this quarter same UCCs as above | 2729 | NUM(12,4) |
| HEALTHPQ | Health care last quarter HLTHINPQ + MEDSRVPQ + PREDRGPQ + MEDSUPPQ | 2741 | NUM(12,4) |
| HEALTHCQ | Health care this quarter same composition as above | 2753 | NUM(12,4) |
| HLTHINPQ | Health insurance last quarter 580111 580112 580113 580114 580311 580312 580901 580903 580904 580905 580906 | 2765 | NUM(12,4) |
| HLTHINCQ | Health insurance this quarter same UCCs as above | 2777 | NUM(12,4) |
| MEDSRVPQ | Medical services last quarter 560110 560210 560310 560330 560400 570110 | 2789 | NUM(12,4) |

| | 570210 | 570220 | 570230 | 570240 | | |
|-----------|---|--------|--------|--------|------|-----------|
| MEDSRVCQ | Medical services this quarter same UCCs as above | | | | 2801 | NUM(12,4) |
| PREDRGPQ | Prescription drugs last quarter 540000 | | | | 2813 | NUM(12,4) |
| PREDRGCQ | Prescription drugs this quarter same UCC as above | | | | 2825 | NUM(12,4) |
| MEDSUPPQ | Medical supplies last quarter 550110 550320 550330 550340 570901 570903 | | | | 2837 | NUM(12,4) |
| MEDSUPCQ | Medical supplies this quarter same UCCs as above | | | | 2849 | NUM(12,4) |
| ENTERTPQ | Entertainment last quarter FEEADMPQ + TVRDIOPQ + OTHEQPPQ | | | | 2861 | NUM(12,4) |
| ENTERTCQ | Entertainment this quarter same composition as above | | | | 2873 | NUM(12,4) |
| FEEADMPQ | Fees and admissions last quarter 610900 620111 620121 620122 620211 620212 620221 620222 620310 620903 | | | | 2885 | NUM(12,4) |
| FEEADMCPQ | Fees and admissions this quarter same UCCs as above | | | | 2897 | NUM(12,4) |
| TVRDIOPQ | Televisions, radios, and sound equipment last quarter 270310 310110 310120 310130 310210 310220 310230 310311 310313 310320 310333 310334 310341 310342 340610 340902 340905 610130 620904 620912 | | | | 2909 | NUM(12,4) |
| TVRDIOCQ | Televisions, radios, and sound equipment this quarter same UCCs as above | | | | 2921 | NUM(12,4) |
| OTHEQPPQ | Other equipment and services last quarter PETTOYPQ + OTHENTPQ | | | | 2933 | NUM(12,4) |
| OTHEQPCQ | Other equipment and services this quarter same composition as above | | | | 2945 | NUM(12,4) |
| PETTOYPQ | Pets, toys, and playground equipment last quarter 610110 610120 610320 620410 620420 | | | | 2957 | NUM(12,4) |
| PETTOYCQ | Pets, toys, and playground equipment this quarter same UCCs as above | | | | 2969 | NUM(12,4) |
| OTHENTPQ | Other entertainment last quarter 520901 520904 520907 600110 600121 600122 600132 600141 600142 600210 600310 600410 600420 600430 600901 600902 610210 610230 | | | | 2981 | NUM(12,4) |

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|----------|---|------|-----------|
| | 620330 620905 620906 620908 620909 620919 620921 620922 620320 | | |
| OTHENTCQ | Other entertainment this quarter same UCCs as above | 2993 | NUM(12,4) |
| PERSCAPQ | Personal care last quarter 640130 640420 650310 | 3005 | NUM(12,4) |
| PERSCACQ | Personal care this quarter same UCCs as above | 3017 | NUM(12,4) |
| READPQ | Reading last quarter 590111 590112 590211 590212 590220 590230 660310 | 3029 | NUM(12,4) |
| READCQ | Reading this quarter same UCCs as above | 3041 | NUM(12,4) |
| EDUCAPQ | Education last quarter 660110 660210 660900 670110 670210 670901 670902 | 3053 | NUM(12,4) |
| EDUCACQ | Education this quarter same UCCs as above | 3065 | NUM(12,4) |
| TOBACCPQ | Tobacco and smoking supplies last quarter 630110 630210 | 3077 | NUM(12,4) |
| TOBACCCQ | Tobacco and smoking supplies this quarter same UCCs as above | 3089 | NUM(12,4) |
| MISCPQ | Miscellaneous expenditures last quarter MISC1PQ + MISC2PQ | 3101 | NUM(12,4) |
| MISCCQ | Miscellaneous expenditures this quarter same composition as above | 3113 | NUM(12,4) |
| MISCX4PQ | Adjusted miscellaneous expenditures last quarter <i>(To be used for population estimates - see information under Summary Expenditure Data heading.)</i> MISC1PQ + (4*MISC2PQ) | 3411 | NUM(12,4) |
| MISCX4CQ | Adjusted miscellaneous expenditures this quarter <i>(To be used for population estimates - see information under Summary Expenditure Data heading.)</i> same composition as above | 3423 | NUM(12,4) |
| MISC1PQ | Miscellaneous expenditures last quarter (data collected in all interviews) 620112 620115 620926 680110 680140 680210 680220 680901 680902 790600 880210 900002 | 3125 | NUM(12,4) |

| | | | |
|--|--|------|-----------|
| MISC1CQ | Miscellaneous expenditures this quarter (data collected in all interviews) same UCCs as above | 3137 | NUM(12,4) |
| MISC2PQ | Miscellaneous expenditures last quarter (data collected only in fifth interview) 710110 | 3149 | NUM(12,4) |
| MISC2CQ | Miscellaneous expenditures this quarter (data collected only in fifth interview) same UCCs as above | 3161 | NUM(12,4) |
| <i>NOTE: See important information about the miscellaneous expenditure variables under the SUMMARY EXPENDITURE DATA heading prior to this list of variables.</i> | | | |
| CASHCOPQ | Cash contributions last quarter 800111 800121 800804 800811 800821 800831 800841 800851 800861 | 3173 | NUM(12,4) |
| CASHCOCQ | Cash contributions this quarter same UCCs as above | 3185 | NUM(12,4) |
| <i>NOTE: See important information about the cash contributions variables under the SUMMARY EXPENDITURE DATA heading prior to this list of variables.</i> | | | |
| PERINSPQ | Personal insurance and pensions last quarter LIFINSPQ + RETPENPQ | 3197 | NUM(12,4) |
| PERINSCQ | Personal insurance and pensions this quarter same composition as above | 3209 | NUM(12,4) |
| LIFINSPQ | Life and other personal insurance last quarter 002120 700110 | 3221 | NUM(12,4) |
| LIFINSCQ | Life and other personal insurance this quarter same UCCs as above | 3233 | NUM(12,4) |
| RETPENPQ | Retirement, pensions, Social Security last quarter 800910 800920 800931 800932 800940 | 3245 | NUM(12,4) |
| RETPENCQ | Retirement, pensions, Social Security this quarter same UCCs as above | 3257 | NUM(12,4) |

Travel related summary expenditure variables

The following summary level “travel” expenditure variables (T-variables) describe expenditures by consumer units on out-of-town trips. These variables have been constructed to facilitate research on travel related spending. Because the UCCs describing these items are scattered across several categories, they are collected in one format for the convenience of the user. As is the convention with the main summary level expenditure variables above, each of the T-variable categories are sorted by expenditures that took place during the previous calendar quarter and current calendar quarter. However for the T-variables, the previous quarter expenditure variables are appended with “P” and the current quarter expenditure variables are appended with “C”.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|--|-----------------------|---------------|
| TTOTALP | Total of all trip expenditures last quarter (TFOODTOP+TALCBEVP+TOTHROP+TTRANPRP+TENTRMNP) | 3462 | NUM(10,3) |
| TTOTALC | Total of all trip expenditures this quarter Same composition as above | 3472 | NUM(10,3) |
| TFOODTOP | Total trip expenditures on food last quarter including both restaurant food and food prepared by CU (TFOODAWP+TFOODHOP) | 3482 | NUM(10,3) |
| TFOODTOC | Total trip expenditures on food this quarter including both restaurant food and food prepared by CU Same composition as above | 3492 | NUM(10,3) |
| TFOODAWP | Food and non-alcoholic beverages last quarter at restaurants, cafes, and fast food places during out-of-town trips 190903 | 3502 | NUM(10,3) |
| TFOODAWC | Food and non-alcoholic beverages this quarter at restaurants, cafes, and fast food places during out-of-town trips same UCC as above | 3512 | NUM(10,3) |
| TFOODHOP | Food and beverages purchased and prepared by CU last quarter during out-of-town trips 190904 | 3522 | NUM(10,3) |
| TFOODHOC | Food and beverages purchased and prepared by CU this quarter during out-of-town trips same UCC as above | 3532 | NUM(10,3) |
| TALCBEVP | Total trip expenditures last quarter on alcoholic beverages at restaurants, cafes, and bars 200900 | 3542 | NUM(10,3) |
| TALCBEVC | Total trip expenditures this quarter on alcoholic beverages at restaurants, cafes, and bars same UCC as above | 3552 | NUM(10,3) |
| TOTHROP | Total trip expenditures on lodging last quarter including rent for vacation home, and motels 210210 | 3562 | NUM(10,3) |

| | | | |
|----------|---|------|-----------|
| TOTHRLOC | Total trip expenditures on lodging this quarter including rent for vacation home, and motels same UCC as above | 3572 | NUM(10,3) |
| TTRANPRP | Total trip expenditures on transportation last quarter including airfare, local transportation, tolls and parking fees, and car rentals (TGASMOTP+TVRENTLP+TTRNTRIP) | 3582 | NUM(10,3) |
| TTRANPRC | Total trip expenditures on transportation this quarter including airfare, local transportation, tolls and parking fees, and car rentals same composition as above | 3592 | NUM(10,3) |
| TGASMOTP | Trip expenditures on gas and oil last quarter 470113 470212 | 3602 | NUM(10,3) |
| TGASMOTC | Trip expenditures on gas and oil this quarter same UCCs as above | 3612 | NUM(10,3) |
| TVRENTLP | Trip expenditures on vehicle rentals and other fees last quarter (TCARTRKP+TOTHVHRP+TOTHTREP) | 3622 | NUM(10,3) |
| TVRENTLC | Trip expenditures on vehicle rentals and other fees this quarter same composition as above | 3632 | NUM(10,3) |
| TCARTRKP | Trip expenditures on car or truck rental last quarter 520512 520522 | 3642 | NUM(10,3) |
| TCARTRKC | Trip expenditures on car or truck rental this quarter same UCCs as above | 3652 | NUM(10,3) |
| TOTHVHRP | Trip expenditures on car or truck rental last quarter 520905 520906 | 3662 | NUM(10,3) |
| TOTHVHRC | Trip expenditures on car or truck rental this quarter same UCCS as above | 3672 | NUM(10,3) |
| TOTHTREP | Trip expenditures last quarter for other transportation expenses including parking fees, and tolls 520532 520542 | 3682 | NUM(10,3) |
| TOTHTREC | Trip expenditures this quarter for other transportation expenses including parking fees, and tolls same UCCs as above | 3692 | NUM(10,3) |
| TTRNTRIP | Trip expenditures last quarter for public transportation, including airfares (TFAREP+TLOCALTP) | 3702 | NUM(10,3) |
| TTRNTRIC | Trip expenditures this quarter for public transportation, including airfares same composition as above | 3712 | NUM(10,3) |

| | | | |
|----------|---|------|-----------|
| TFAREP | Trip expenditures last quarter on transportation fares including airfare, intercity bus, train, and ship fare (TAIRFARP+TOTHFARP) | 3722 | NUM(10,3) |
| TFAREC | Trip expenditures this quarter on transportation fares including airfare, intercity bus, train, and ship fare same composition as above | 3732 | NUM(10,3) |
| TAIRFARP | Trip expenditures on airfare last quarter 530110 | 3742 | NUM(10,3) |
| TAIRFARC | Trip expenditures on airfare this quarter same UCC as above | 3752 | NUM(10,3) |
| TOTHFARP | Tip expenditures last quarter on other transportation fares including intercity bus and train fare, and ship fare 530210 530510 530901 | 3762 | NUM(10,3) |
| TOTHFARC | Tip expenditures this quarter on other transportation fares including intercity bus and train fare, and ship fare same UCCs as above | 3772 | NUM(10,3) |
| TLOCALTP | Trip expenditures last quarter on local transportation including taxis, buses etc. 530312 530411 | 3782 | NUM(10,3) |
| TLOCALTC | Trip expenditures this quarter on local transportation including taxis, buses etc. same UCCs as above | 3792 | NUM(10,3) |
| TENTRMNP | Total trip expenditures on entertainment last quarter including sporting events, movies, and recreational vehicle rentals TFEESADP+TOTHENTP | 3802 | NUM(10,3) |
| TENTRMNC | Total trip expenditures on entertainment this quarter including sporting events, movies, and recreational vehicle rentals same composition as above | 3812 | NUM(10,3) |
| TFEESADP | Trip expenditures on miscellaneous entertainment last quarter including recreation expenses, participation sport fees, and admission fees to sporting events and movies 610900 620122 620212 620222 620903 | 3822 | NUM(10,3) |
| TFEESADC | Trip expenditures on miscellaneous entertainment this quarter including recreation expenses, participation sport fees, and admission fees to sporting events and movies same UCCs as above | 3832 | NUM(10,3) |
| TOTHENTP | Trip expenditures on recreational vehicle rentals last quarter including campers, boats, and other vehicles 520907 620909 620919 | 3842 | NUM(10,3) |
| TOTHENTC | Trip expenditures on recreational vehicle rentals this quarter including campers, boats, and other vehicles same UCCs as above | 3852 | NUM(10,3) |

The following variables include expenditures related to vacation homes. Because these types of expenditures are not directly related to travel, they are not included in TOTALP(C) and hence the names of these variables do not start with a "T". While principal and interest payments for owned vacation homes are included in the variables below, please be aware that rent paid for vacation homes is included in TOTHRLOP(C).

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|---|-----------------------|---------------|
| OWNVACP | Expenditures on owned vacation homes last quarter including mortgage interest, insurance, taxes, maintenance, and miscellaneous household equipment VOTHRLOP+VMISCHEP | 3862 | NUM(10,3) |
| OWNVACC | Expenditures on owned vacation homes this quarter including mortgage interest, insurance, taxes, maintenance, and miscellaneous household equipment same composition as above | 3872 | NUM(10,3) |
| VOTHRLOP | Expenditures on owned vacation homes last quarter including mortgage interest, insurance, taxes, and maintenance 210902 220122 220212 220312 220314 220322 220902 230119 230123 230152 230902 240113 240123 240214 240223 240313 240323 320613 320623 320633 340912 880310 990940 | 3882 | NUM(10,3) |
| VOTHRLOC | Expenditures on owned vacation homes this quarter including mortgage interest, insurance, taxes, and maintenance same UCCs as above | 3892 | NUM(10,3) |
| VMISCHEP | Expenditures on miscellaneous household equipment for owned vacation homes last quarter 690243 | 3902 | NUM(10,3) |
| VMISCHEC | Expenditures on miscellaneous household equipment for owned vacation homes this quarter same UCC as above | 3912 | NUM(10,3) |
| UTILOWNP | Expenditures on owned vacation home utilities last quarter including water, trash, electricity, and fuels VFUELOIP+VOTHRFLP+VELECTRP+VNATLGAP +VWATERPP | 3922 | NUM(10,3) |
| UTILOWNC | Expenditures on owned vacation home utilities this quarter including water, trash, electricity, and fuels same composition as above | 3932 | NUM(10,3) |
| VFUELOIP | Expenditures on electricity for owned vacation homes last quarter 250113 | 3942 | NUM(10,3) |

| | | | |
|----------|--|------|-----------|
| VFUELOIC | Expenditures on electricity for owned vacation homes this quarter Same UCC as above | 3952 | NUM(10,3) |
| VOTHRFLP | Expenditures on other fuels for owned vacation homes last quarter 250213 250223 250903 | 3962 | NUM(10,3) |
| VOTHRFLC | Expenditures on other fuels for owned vacation homes this quarter same UCCs as above | 3972 | NUM(10,3) |
| VELECTRP | Expenditures on electricity for owned vacation homes last quarter 260113 | 3982 | NUM(10,3) |
| VELECTRC | Expenditures on electricity for owned vacation homes this quarter same UCC as above | 3992 | NUM(10,3) |
| VNATLGAP | Expenditures on natural gas for owned vacation homes last quarter 260213 | 4002 | NUM(10,3) |
| VNATLGAC | Expenditures on natural gas for owned vacation homes this quarter same UCC as above | 4112 | NUM(10,3) |
| VWATERPP | Expenditures on water and public services for owned vacation homes last quarter 270213 270413 270903 | 4122 | NUM(10,3) |
| VWATERPC | Expenditures on water and public services for owned vacation homes this quarter Same UCCs as above | 4132 | NUM(10,3) |
| MRTPRNOP | Outlays on owned vacation home mortgage principle last quarter 830102 830202 830204 880320 | 4142 | NUM(10,3) |
| MRTPRNOC | Outlays on owned vacation home mortgage principle this quarter same UCCs as above | 4152 | NUM(10,3) |
| UTILRNTP | Expenditures on rented vacation home utilities last quarter including water, trash, electricity, and fuels RFUELOIP+ROTHRFLP+RELECTRP+RNATLGAP +RWATERPP | 4162 | NUM(10,3) |
| UTILRNTP | Expenditures on rented vacation home utilities this quarter including water, trash, electricity, and fuels same composition as above | 4172 | NUM(10,3) |
| RFUELOIP | Expenditures on fuel oil for rented vacation homes last quarter 250114 | 4082 | NUM(10,3) |

| | | | |
|----------|--|------|-----------|
| RFUELOIC | Expenditures on fuel oil for rented vacation homes this quarter same UCC as above | 4092 | NUM(10,3) |
| ROTHRFLP | Expenditures on other fuels for rented vacation homes last quarter 250214 250224 250904 | 4102 | NUM(10,3) |
| ROTHRFLC | Expenditures on other fuels for rented vacation homes this quarter same UCCs as above | 4112 | NUM(10,3) |
| RELECTRP | Expenditures on electricity for rented vacation homes last quarter 260114 | 4222 | NUM(10,3) |
| RELECTRC | Expenditures on electricity for rented vacation homes this quarter same UCC as above | 4232 | NUM(10,3) |
| RNATLGAP | Expenditures on natural gas for rented vacation homes last quarter 260214 | 4242 | NUM(10,3) |
| RNATLGAC | Expenditures on natural gas for rented vacation homes this quarter same UCC as above | 4252 | NUM(10,3) |
| RWATERPP | Expenditures on water and public services for rented vacation homes last quarter 270214 270414 270904 | 4262 | NUM(10,3) |
| RWATERPC | Expenditures on water and public services for rented vacation homes this quarter same UCCs as above | 4272 | NUM(10,3) |

Expenditure Outlays Summary Variables

Expenditure outlay summary level variables (EVARS) are used to provide a measurement of all expenditure outlays. These variables are constructed similarly to the main summary level expenditure variables in that they contain interest payments for home mortgage and vehicles when financed. The difference with the EVARS are that they also include payments on principle for home mortgages and vehicles. Note: main summary level expenditure variables are components of the higher aggregated EVARS. The EVARS follow the same naming convention as the main summary level expenditure variables. Expenditures within the collection quarter are sorted by whether they occurred in the previous calendar quarter or in the current calendar quarter. As in the Travel related summary variables, the EVARS are appended with a "P" for previous or "C" for current.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|---|-----------------------|---------------|
| ETOTALP | Total outlays last quarter, sum of outlays from all major expenditure categories. FOODPQ + ALCBEVPQ + EHOUSNGP + APPARPQ + ETRANPTP + HEALTHPQ + EENTRMTP + PERSCAPQ + READPQ + EDUCAPQ + TOBACCPQ + EMISCELP + CASHCOPQ + PERINSPQ | 4206 | NUM(10,3) |
| ETOTALC | Total outlays this quarter, sum of outlays from all major expenditure categories. Same composition as above | 4216 | NUM(10,3) |
| ETOTAPX4 | Adjusted total outlays last quarter, sum of outlays from all major expenditure categories. FOODPQ + ALCBEVPQ + EHOUSNGP + APPARPQ + ETRANPTP + HEALTHPQ + EENTRMTP + PERSCAPQ + READPQ + EDUCAPQ + TOBACCPQ + MISC1PQ + MISC2PQ * (4) + EMISCMTP + PERINSPQ | 4226 | NUM(10,3) |
| ETOTACX4 | Adjusted total outlays this quarter, sum of outlays from all major expenditure categories. Same composition as above | 4236 | NUM(10,3) |
| EHOUSNGP | Total housing outlays last quarter including maintenance, fuels, public services, household operations, house furnishings, and mortgage (lump sum home equity loan or line of credit home equity loan) principle and interest. ESHELTRP + UTILPQ + HOUSOPPQ + HOUSEQPQ | 4246 | NUM(10,3) |
| EHOUSNGC | Total housing outlays this quarter including maintenance, fuels, public services, household operations, house furnishings, and mortgage (lump sum home equity loan or line of credit home equity loan) principle and interest. Same composition as above | 4256 | NUM(10,3) |
| ESHELTRP | Shelter outlays last quarter including mortgage principle and interest for owned home and/or vacation home, rents, insurance, taxes, and maintenance. EOWNDWLP + RENDWEPQ + EOTHLODP | 4266 | NUM(10,3) |
| ESHELTRC | Shelter outlays this quarter including mortgage principle and | 4276 | NUM(10,3) |

| | | | |
|----------|--|------|-----------|
| | interest for owned home and/or vacation home, rents, insurance, taxes, and maintenance. Same composition as above | | |
| EOWNDWLP | Owned home outlays last quarter including mortgage principal and interest, property taxes, maintenance, insurance, and other expenses. OWNDWEPQ + EMRTPNOP | 4286 | NUM(10,3) |
| EOWNDWLC | Owned home outlays this quarter including mortgage principal and interest, property taxes, maintenance, insurance, and other expenses. Same composition as above | 4296 | NUM(10,3) |
| EOTHLODP | Outlays for other lodging last quarter such as owned vacation home, including mortgage principal and interest, property taxes, maintenance, insurance, and other expenses. OTHLODPQ, EMRTPNVP | 4306 | NUM(10,3) |
| EOTHLODC | Outlays for other lodging this quarter such as owned vacation home, including mortgage principal and interest, property taxes, maintenance, insurance, and other expenses. Same composition as above | 4316 | NUM(10,3) |
| EMRTPNOP | Mortgage principal outlays last quarter for owned home. 830201, 830203, 880120 Since the value of the cost variable for these UCCs are always negative, the absolute value of the MTAB costs are used to convert the values of this family file variable to positive values. | 4326 | NUM(10,3) |
| EMRTPNOC | Mortgage principal outlays this quarter for owned home. Same composition as above | 4336 | NUM(10,3) |
| EMRTPNVP | Mortgage principal outlays last quarter for owned vacation home. 830202, 830204, 880320 Since the value of the cost variable for these UCCs are always negative, the absolute value of the MTAB costs are used to convert the values of this family file variable to positive values. | 4346 | NUM(10,3) |
| EMRTPNVC | Mortgage principal outlays this quarter for owned vacation home. Same composition as above | 4356 | NUM(10,3) |
| ETRANPTP | Total outlays for transportation this quarter including down payment, principal and finance charges paid on loans, gasoline and motor oil, maintenance and repairs, insurance, public transportation, and vehicle rental licenses and other charges. EVEHPURP + GASMOPQ + MAINRPPQ + VEHINSPQ + VRNTLOPQ + PUBTRAPQ | 4366 | NUM(10,3) |

| | | | |
|----------|---|------|-----------|
| ETRANPTC | Total outlays for transportation last quarter including down payment, principal and finance charges paid on loans, gasoline and motor oil, maintenance and repairs, insurance, public transportation, and vehicle rental licenses and other charges. Same composition as above | 4376 | NUM(10,3) |
| EVEHPURP | Outlays for vehicle purchases this quarter including down payment, principal and interest paid on loans, or if not financed, purchase amount. ECARTKNP + ECARTKUP + EOTHVEHP | 4386 | NUM(10,3) |
| EVEHPURC | Outlays for vehicle purchases last quarter including down payment, principal and interest paid on loans, or if not financed, purchase amount. Same composition as above | 4396 | NUM(10,3) |
| ECARTKNP | Outlays for new vehicle purchases this quarter including down payment, principal and interest paid on loans, or if not financed, purchase amount. 870101, 870102, 870103, 870104 | 4406 | NUM(10,3) |
| ECARTKNC | Outlays for new vehicle purchases last quarter including down payment, principal and interest paid on loans, or if not financed, purchase amount. Same composition as above | 4416 | NUM(10,3) |
| ECARTKUP | Outlays for used vehicle purchases this quarter including down payment, principal and interest paid on loans, or if not financed, purchase amount. 870201, 870202, 870203, 870204 | 4426 | NUM(10,3) |
| ECARTKUC | Outlays for used vehicle purchases last quarter including down payment, principal and interest paid on loans, or if not financed, purchase amount. Same composition as above | 4436 | NUM(10,3) |
| EOTHVEHP | Outlays for other vehicle purchases this quarter such as motorcycles and airplanes including down payment, principal and interest paid on loans, or if not financed, purchase amount. 870301, 870302, 870303, 870304 | 4446 | NUM(10,3) |
| EOTHVEHC | Outlays for other vehicle purchases last quarter such as motorcycles and airplanes including down payment, principal and interest paid on loans, or if not financed, purchase amount. Same composition as above | 4456 | NUM(10,3) |
| EENTRMTP | Total entertainment outlays this quarter including sound systems, sports equipment, toys, cameras, and down payments on boats and campers. FEEADMPQ, TVRDIOPQ, PETTOYPQ, EOTHENTP | 4466 | NUM(10,3) |
| EENTRMTC | Total entertainment outlays last quarter including sound systems, sports equipment, toys, cameras, and down | 4476 | NUM(10,3) |

| | | | |
|----------|--|------|-----------|
| | payments on boats and campers. Same composition as above | | |
| EOTHENTP | Outlays for other entertainment supplies this quarter, equipment, and services including down payments on boats and campers. ENOMOTRP + EMOTRVHP + EENTMSCP | 4486 | NUM(10,3) |
| EOTHENTC | Outlays for other entertainment supplies last quarter, equipment, and services including down payments on boats and campers. Same composition as above | 4496 | NUM(10,3) |
| ENOMOTRP | Outlays for non-motored recreational vehicles this quarter. 870401, 870402, 870403, 870404, 870501, 870502, 870503, 870504 | 4506 | NUM(10,3) |
| ENOMOTRC | Outlays for non-motored recreational vehicles last quarter. Same composition as above | 4516 | NUM(10,3) |
| EMOTRVHP | Outlays for motored recreational vehicles this quarter. 870605, 870606, 870607, 870608, 870701, 870702, 870703, 870704, 870801, 870802, 870803, 870804 | 4526 | NUM(10,3) |
| EMOTRVHC | Outlays for motored recreational vehicles last quarter. Same composition as above | 4536 | NUM(10,3) |
| EENTMSCP | Miscellaneous entertainment outlays this quarter including photographic and sports equipment, and boat and RV rentals. 520901, 520904, 520907, 600110, 600210, 600310, 600410, 600420, 600430, 600901, 600902, 610210, 610230, 620320, 620330, 620905, 620906, 620908, 620909, 620919, 620921, 620922 | 4546 | NUM(10,3) |
| EENTMSCC | Miscellaneous entertainment outlays last quarter including photographic and sports equipment, and boat and RV rentals. Same composition as above | 4556 | NUM(10,3) |
| EMISCELP | Miscellaneous outlays this quarter including reduction of mortgage principal (lump sum home equity loan) on other property. MISCPQ + EMISCMTP | 4566 | NUM(10,3) |
| EMISCELC | Miscellaneous outlays last quarter including reduction of mortgage principal (lump sum home equity loan) on other property. Same composition as above | 4576 | NUM(10,3) |
| EMISCMTP | Mortgage principal outlays this quarter for other property. 790920, 790940, 880220 | 4586 | NUM(10,3) |

Since the value of the cost variable for these UCCs are always negative, the absolute value of the MTAB costs are used to convert the values of this family file variable to positive values.

| | | | |
|----------|--|------|-----------|
| EMISCMTC | Mortgage principal outlays last quarter for other property. Same composition as above | 4596 | NUM(10,3) |
|----------|--|------|-----------|

2. MEMBER CHARACTERISTICS AND INCOME (MEMB) FILE

The "MEMB" file, also referred to as the "Member Characteristics and Income" file, contains selected characteristics for each CU member, including identification of relationship to reference person. Characteristics for the reference person and spouse appear on both the MEMB file and FMLY file.

Demographic characteristic data, such as age of CU member, refer to the member status on the date of the interview. Characteristic information may change between interviews. Income data are collected in the second and fifth interviews for all CU members over 13 years of age and in the third and fourth interviews for members over 13 who are new to the CU or who previously reported not working and are now working. Member income data from the second interview are carried over to the third and fourth interviews subject to the above conditions. Income variables contain annual values for the 12 months prior to the interview month. Income taxes withheld and pension and retirement contributions are shown both annually and as deductions from the member's last paycheck. When there is a valid nonresponse, or where nonresponse occurs and there is no imputation, there will be missing values. The type of nonresponse is explained by associated data flag variables described in Section III.C. DATA FLAGS.

a. CU AND MEMBER IDENTIFIERS

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|----------|--|----------------|--------|
| NEWID | CU identification number. Digits 1-7 (CU sequence number, 1 through 9999999) uniquely identify the CU. Digit 8 is the interview number, 2 through 5. It is possible for a CU to skip an interview. For example, a CU could have a 2nd, 3rd and 5th interview but no 4th interview. BLS derived | 1 | NUM(8) |
| MEMBNO | Person line number Control Card 16 | 151 | NUM(2) |

b. CHARACTERISTICS OF MEMBER

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|----------|---|----------------|---------|
| CU_CODE | What is the member's relationship to (<i>reference person</i>)? CODED 1 Reference person 2 Spouse 3 Child or adopted child 4 Grandchild 5 In-law 6 Brother or sister 7 Mother or father 8 Other related person 9 Unrelated person 0 Blank, or illegible entry Control Card 19 | 68 | CHAR(1) |
| CU_CODE_ | | 69 | CHAR(1) |
| AGE | What is the member's date of birth? (Age is verified.) Control Card 24 | 9 | NUM(2) |
| AGE_ | | 11 | CHAR(1) |
| RACE | What is the race of each person in this CU? CODED 1 White 2 Black 3 American Indian, Aleut, or Eskimo 4 Asian or Pacific Islander Control Card 25 | 183 | CHAR(1) |
| RACE_ | | 184 | CHAR(1) |
| SEX | Is the member male or female? CODED 1 Male 2 Female Control Card 21 | 221 | CHAR(1) |
| SEX_ | | 222 | CHAR(1) |
| MARITAL | Is the member now . . . ? (Marital status) CODED 1 Married 2 Widowed 3 Divorced 4 Separated 5 Never married | 147 | CHAR(1) |

Control Card 27

MARITAL_ 148 CHAR(1)

ORIGINR What is the member's ethnic origin or ancestry? 169 CHAR(1)
CODED

- 1 European:
 - German
 - Italian
 - Irish
 - French
 - Polish
 - Russian
 - English
 - Scottish
 - Dutch
 - Swedish
 - Hungarian
- 2 Spanish:
 - Mexican American
 - Chicano
 - Mexican
 - Puerto Rican
 - Cuban
 - Central or South American
 - Other Spanish
- 3 Afro-American (Black or Negro)
- 4 Another group not listed / Don't know

Control Card 26

EDUCA What is the highest level of school the member has completed or 74 CHAR(2)
the highest degree the member has received?

- CODED
- 00 Never attended school
 - 01-11 1st grade through 11th grade
 - 38 Twelfth grade – no degree
 - 39 High school graduate
 - 40 Some college – no degree
 - 41 Associate's degree (occupational/vocational)
 - 42 Associate's degree (academic)
 - 43 Bachelor's degree
 - 44 Master's degree
 - 45 Professional degree
 - 46 Doctorate degree

Control Card 28a

EDUCA_ 76 CHAR(1)

IN_COLL Is the member currently enrolled in a college or university 112 CHAR(1)
either . . . ?

- CODED
- 1 Full time

- 2 Part time
- 3 Not at all

Control Card 28b

| | | | |
|----------|---|-----|---------|
| IN_COLL_ | | 113 | CHAR(1) |
| ARM_FORC | Is the member now in the armed forces? CODED | 66 | CHAR(1) |
| | 1 Yes | | |
| | 2 No | | |

Control Card 29

| | | | |
|----------|------------------------------------|----|---------|
| ARM__ORC | | 67 | CHAR(1) |
| EARNER | Does member earn income? CODED | 70 | CHAR(1) |
| | 1 Yes, member earns income. | | |
| | 2 No, member does not earn income. | | |

BLS derived

| | | | |
|----------|---|----|---------|
| EARNER_ | | 71 | CHAR(1) |
| EARNTYPE | Type of earner CODED | 72 | CHAR(1) |
| | 1 Member worked full time for a full year. | | |
| | 2 Member worked part time for a full year. | | |
| | 3 Member worked full time for part of year. | | |
| | 4 Member worked part time for part of year. | | |

BLS derived

| | | | |
|----------|--|-----|---------|
| EARN_YPE | | 73 | CHAR(1) |
| SCHMLWKQ | How many weeks did the member purchase meals at school? S 20A 9b.d | 214 | NUM(2) |
| SCHM_WKQ | | 216 | CHAR(1) |
| SCHMLWKX | What is the usual WEEKLY expense for the meals the member purchased at school? S 20A 9b.c | 217 | NUM(3) |
| SCHM_WKX | | 220 | CHAR(1) |

c. WORK EXPERIENCE OF MEMBER

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|----------|---|----------------|---------|
| INCWEEKQ | In the last 12 months, how many weeks did the member work either full or part time not counting work around the house? Include paid vacation and paid sick leave. S22A-E 2 | 126 | NUM(2) |
| INCW_EKQ | | 128 | CHAR(1) |
| INC_HRSQ | In the weeks that the member worked, how many hours did the member usually work per week? S22A-E 3 | 114 | NUM(3) |
| INC__RSQ | | 117 | CHAR(1) |
| OCCUCODE | The job in which the member received the most earnings during the past 12 months fits best in the following category: CODED Manager, professional 01 Administrator, manager 02 Teacher 03 Professional Administrative support, technical, sales 04 Administrative support, including clerical 05 Sales, retail 06 Sales, business goods and services 07 Technician Service 08 Protective service 09 Private household service 10 Other service Operator, assembler, laborer 11 Machine operator, assembler, inspector 12 Transportation operator 13 Handler, helper, laborer Precision production, craft, repair 14 Mechanic, repairer, precision production 15 Construction, mining Farming, forestry, fishing 16 Farming 17 Forestry, fishing, groundskeeping Armed forces 18 Armed forces S22A-E 4a | 166 | CHAR(2) |
| OCCU_ODE | | 168 | CHAR(1) |
| INCOMEY | Was the member . . . ? (Type of employee) Refers to job where member received the most earnings in the past 12 months. CODED | 122 | CHAR(1) |

- 1 An employee of a PRIVATE company, business, or individual working for wages or salary
- 2 A Federal government employee
- 3 A State government employee
- 4 A local government employee
- 5 Self-employed in OWN business, professional practice or farm
- 6 Working WITHOUT PAY in family business or farm,

S22A-E 4b

INCOMEY_ 123 CHAR(1)

INCORP Is the business incorporated? (For members who are self-employed in own business or professional practice, excluding farms.) Refers to job where member received the most earnings in the past 12 months. 124 CHAR(1)

CODED

- 1 Yes
- 2 No

S22A-E 4b

INCORP_ 125 CHAR(1)

PWRKSTAT Work status of member in past 12 months (Refers to job where member received the most earnings in the past 12 months.) 181 CHAR(1)

CODED

- 1 Salaried
- 2 Self-employed
- 3 Working without pay

BLS derived

PWRK_TAT 182 CHAR(1)

INCNONWK What was the main reason the member did not work during the past 12 months? Was the member . . .? 120 CHAR(1)

CODED

- 1 Retired
- 2 Taking care of home/family
- 3 Going to school
- 4 Ill, disabled, unable to work
- 5 Unable to find work
- 6 Doing something else

S22A-E 5

INCN_NWK 121 CHAR(1)

d. INCOME

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|----------|--|----------------|---------|
| SALARYX | During the past 12 months, what was the amount of wages or salary income received before any deductions? S22A-E 6a | 203 | NUM(10) |
| SALARYX_ | | 213 | CHAR(1) |
| SALARYB | Bracketed variable for SALARYX CODED 01 \$0 - \$4,999 02 \$5,000 - \$9,999 03 \$10,000 - \$14,999 04 \$15,000 - \$19,999 05 \$20,000 - \$29,999 06 \$30,000 - \$39,999 07 \$40,000 - \$49,999 08 \$50,000 - \$69,999 09 \$70,000 - \$89,999 10 \$90,000 - \$119,999 11 \$120,000 and over S 22A E6b | 262 | CHAR(2) |
| SALARYB_ | | 264 | CHAR(1) |
| SALARYBX | Median of bracket range of SALARYB BLS derived | 265 | NUM(6) |
| SALA_YBX | | 271 | CHAR(1) |
| GROSPAYX | What was the gross amount of the member's last pay? S 22A E6c | 101 | NUM(10) |
| GROS_AYX | | 111 | CHAR(1) |
| PAYPERD | What period of time did this last gross pay cover? CODED 1 One week 2 Two weeks 3 Month 4 Quarter 5 Year 6 Other 7 Twice a month S 22A E6d | 170 | CHAR(1) |
| PAYPERD_ | | 171 | CHAR(1) |

| | | | |
|----------|--|-----|---------|
| NONFARMX | During the past 12 months, what was the amount of income or loss from the member's own nonfarm business, partnership or professional practice after expenses? *L S 22A E7a | 155 | NUM(10) |
| NONF_RMX | | 165 | CHAR(1) |
| NONFARMB | Bracketed variable for NONFARMX CODED 00 Loss 01 \$0 - \$4,999 02 \$5,000 - \$9,999 03 \$10,000 - \$14,999 04 \$15,000 - \$19,999 05 \$20,000 - \$29,999 06 \$30,000 - \$39,999 07 \$40,000 - \$49,999 08 \$50,000 - \$69,999 09 \$70,000 - \$89,999 10 \$90,000 - \$119,999 11 \$120,000 and over S 22A E7b | 272 | CHAR(2) |
| NONF_RMB | | 274 | CHAR(1) |
| NONFRMBX | Median of bracket range of NONFARMB *L BLS derived | 275 | NUM(6) |
| NONF_MBX | | 281 | CHAR(1) |
| NFRMLOSS | Was there a loss from the member's own nonfarm business, partnership, or professional practice? CODED 3 Loss S 22A E7b | 153 | CHAR(1) |
| NFRM_OSS | | 154 | CHAR(1) |
| FARMINCX | During the past 12 months, what was the amount of income or loss from the member's own farm after expenses? *L S 22A E7d | 79 | NUM(10) |
| FARM_NCX | | 89 | CHAR(1) |
| FARMINCB | Bracketed variable for FARMINCX | 282 | CHAR(2) |

CODED

- 00 Loss
- 01 \$0 - \$4,999
- 02 \$5,000 - \$9,999
- 03 \$10,000 - \$14,999
- 04 \$15,000 - \$19,999
- 05 \$20,000 - \$29,999
- 06 \$30,000 - \$39,999
- 07 \$40,000 - \$49,999
- 08 \$50,000 - \$69,999
- 09 \$70,000 - \$89,999
- 10 \$90,000 - \$119,999
- 11 \$120,000 and over

S 22A E7e

| | | | |
|----------|---|-----|---------|
| FARM_NCB | | 284 | CHAR(1) |
| FRMINCBX | Median of bracket range of FARMINCB *L | 285 | NUM(6) |
| | BLS derived | | |
| FRMI_CBX | | 291 | CHAR(1) |
| FARMLOSS | Was there a loss from the member's own farm? CODED | 90 | CHAR(1) |
| | 3 Loss | | |

S 22A E7d

| | | | |
|----------|---|-----|---------|
| FARM_OSS | | 91 | CHAR(1) |
| SOCRRX | Amount of Social Security and Railroad Retirement income received by member in past 12 months | 239 | NUM(8) |
| | BLS derived | | |
| SOCRRX_ | | 247 | CHAR(1) |
| RRRETIRX | What was the amount of the last Social Security or Railroad Retirement payment received? (In past 12 months) | 194 | NUM(8) |

S 22A E9d

| | | | |
|----------|---------------------------------|-----|---------|
| RRRE_IRX | | 202 | CHAR(1) |
| RRRETIRB | Bracketed variable for RRRETIRX | 292 | CHAR(2) |

CODED

- 01 Less than \$300
- 02 \$300 - \$399
- 03 \$400 - \$499
- 04 \$500 - \$599
- 05 \$600 - \$699
- 06 \$700 - \$799

- 07 \$800 - \$899
- 08 \$900 - \$999
- 09 \$1000 - \$1499
- 10 \$1500 and over

S 22A E9e

| | | | |
|----------|-------------------------------------|-----|---------|
| RRRE_IRB | | 294 | CHAR(1) |
| RRRETRBX | Median of bracket range of RRRETIRB | 295 | NUM(6) |

BLS derived

| | | | |
|----------|---|-----|---------|
| RRRE_RBX | | 301 | CHAR(1) |
| INCMEDCR | Is the amount of the last Social Security or Railroad Retirement payment received AFTER the deduction for a Medicare premium? | 118 | CHAR(1) |

CODED

- 1 Yes
- 2 No

S 22A E9f

| | | | |
|----------|---|-----|---------|
| INCM_DCR | | 119 | CHAR(1) |
| SS_RRQ | During the past 12 months, how many Social Security or Railroad Retirement payments did the member receive? | 248 | NUM(2) |

S 22A E9g

| | | | |
|---------|--|-----|---------|
| SS_RRQ_ | | 250 | CHAR(1) |
| SSIX | During the past 12 months, how much did the member receive in Supplemental Security Income checks altogether? (From U.S. Government and State or local Government) | 251 | NUM(8) |

S 22A E10c

| | | | |
|-------|-----------------------------|-----|---------|
| SSIX_ | | 259 | CHAR(1) |
| SSIB | Bracketed variable for SSIX | 302 | CHAR(2) |

CODED

- 01 \$0 - \$999
- 02 \$1,000 - \$1,999
- 03 \$2,000 - \$2,999
- 04 \$3,000 - \$3,999
- 05 \$4,000 - \$4,999
- 06 \$5,000 - \$9,999
- 07 \$10,000 - \$14,999
- 08 \$15,000 - \$19,999
- 09 \$20,000 - \$29,999
- 10 \$30,000 - \$39,999
- 11 \$40,000 - \$49,999
- 12 \$50,000 and over

S 22A E10d

| | | | |
|--------|---------------------------------|-----|---------|
| SSIB_ | | 304 | CHAR(1) |
| SSIBX | Median of bracket range of SSIB | 305 | NUM(6) |
| | BLS derived | | |
| SSIBX_ | | 311 | CHAR(1) |

e. TAXES

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|---|-----------------------|---------------|
| ANFEDTX | Annualized amount of Federal income tax deducted from last pay ((AMTFED/GROSPAYX) x SALARYX) | 21 | NUM(8) |
| | BLS derived | | |
| ANFEDTX_ | | 29 | CHAR(1) |
| AMTFED | How much was deducted from the member's last pay for Federal income tax? | 12 | NUM(8) |
| | S 22A E6e.1 | | |
| AMTFED_ | | 20 | CHAR(1) |
| ANSLTX | Annualized amount of state and local income taxes deducted from last pay ((SLTAXX/GROSPAYX x SALARYX) | 57 | NUM(8) |
| | BLS derived | | |
| ANSLTX_ | | 65 | CHAR(1) |
| SLTAXX | How much was deducted from the member's last pay for state and local income tax? | 230 | NUM(8) |
| | S 22A E6e.2 | | |
| SLTAXX_ | | 238 | CHAR(1) |

f. RETIREMENT AND PENSION DEDUCTIONS

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|---|-----------------------|---------------|
| SSNORM | Are Social Security payments normally deducted from your paycheck? CODED | 260 | CHAR(1) |

| | | | |
|----------|---|-----|---------|
| | 1 Yes 2 No | | |
| | S 22A E6f | | |
| SSNORM_ | | 261 | CHAR(1) |
| JSSDEDX | Estimated amount of income contributed to Social Security by member in past 12 months | 140 | NUM(6) |
| | BLS derived | | |
| MEDICOV | Does the money deducted for Social Security cover only the Medicare portion of Social Security? CODED 1 Yes 2 No | 149 | CHAR(1) |
| | S 22A E6g | | |
| MEDICOV_ | | 150 | CHAR(1) |
| SLFEMPSS | Amount of income contributed to Social Security by member if self-employed | 223 | NUM(6) |
| | BLS derived | | |
| SLFE_PSS | | 229 | CHAR(1) |
| ANRRDEDX | Annualized amount of Railroad Retirement deducted from last pay ((RRRDEDX/GROSPAYX x SALARYX) | 48 | NUM(8) |
| | BLS derived | | |
| ANRR_EDX | | 56 | CHAR(1) |
| RRRDEDX | How much was deducted from the member's last pay for Railroad Retirement? | 185 | NUM(8) |
| | S 22A E6e.5 | | |
| RRRDEDX_ | | 193 | CHAR(1) |
| ANGOVRTX | Annualized amount of Government Retirement deducted from last pay ((GOVRETX/GROSPAYX x SALARYX) | 30 | NUM(8) |
| | BLS derived | | |
| ANGO_RTX | | 38 | CHAR(1) |
| GOVRETX | How much was deducted from the member's last pay for Government Retirement? | 92 | NUM(8) |
| | S 22A E6e.4 | | |

| | | | |
|----------|---|-----|---------|
| GOVRETX_ | | 100 | CHAR(1) |
| ANPRVPNX | Annualized amount of private pensions deducted from last pay ((PRIVPENX/GROSPAYX x SALARYX) BLS derived | 39 | NUM(8) |
| ANPR_PNX | | 47 | CHAR(1) |
| PRIVPENX | How much was deducted from the member's last pay for private pension fund? S 22A E6e.3 | 172 | NUM(8) |
| PRIV_ENX | | 180 | CHAR(1) |
| EMPLCONT | Other than Social Security, did any employer or union that the member worked for during the last 12 months contribute to a pension or retirement plan that the member was enrolled in? CODED 1 Yes 2 No S 22A E6h | 77 | CHAR(1) |
| EMPL_ONT | | 78 | CHAR(1) |
| INDRETX | During the past 12 months, how much money did the member place in a retirement plan such as Individual Retirement Account (IRA & Keogh)? (Exclude rollovers) S 22A E8 | 129 | NUM(10) |
| INDRETX_ | | 139 | CHAR(1) |

3. MONTHLY EXPENDITURES (MTAB) FILE

In the MTAB file, each expenditure reported by a CU is identified by UCC, gift/nongift status, and month in which the expenditure occurred. UCCs are six digit codes that identify items or groups of items. (See Section XIII.A for a listing of UCCs.) The expenditure data record purchases that were made during the three month period prior to the month of the interview. There may be more than one record for a UCC in a single month if that is what was reported to the interviewer. There are no missing values in this file. If no expenditure was reported for the item(s) represented by a UCC, then there is no record for the UCC on the file.

The following UCCs are from questions asked only in the 2nd or 5th interviews.

| | |
|--------|--|
| 006001 | Total amount owed to creditors (2nd interview) |
| 006002 | Total amount owed to creditors (5th interview) |
| 710110 | Finance charges, excluding mortgage and vehicles (5th interview) |

NOTE: To be used at the macro level, the above UCCs need to be multiplied by 4 in order to account for those CUs that are not asked these questions.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|----------|--|----------------|-----------|
| NEWID | <p>CU identification number. Digits 1-7 (CU sequence number, 1 through 9999999) uniquely identify the CU. Digit 8 is the interview number, 2 through 5.</p> <p>It is possible for a CU to skip an interview. For example, a CU could have a 2nd, 3rd and 5th interview but no 4th interview.</p> <p>BLS derived</p> | 1 | NUM(8) |
| UCC | <p>Universal Classification Code</p> <p>See Section XIII.A. for a listing of MTAB UCC codes and titles.</p> <p>BLS derived</p> | 9 | CHAR(6) |
| COST | <p>Cost *L</p> <p>BLS derived</p> | 15 | NUM(12,4) |
| COST_ | <p>Cost flag CODED</p> <p>Computation Status of Cost: T Topcoded 0 No change 1 One of the source fields was flagged by Census 2 Manually updated</p> <p>Note: All of the following flags (3-9 & Q-S) indicate the source field data were adjusted by BLS. 3 Imputation 4 Allocation 5 Imputation and allocation 6 Computation 7 Computation and imputation 8 Computation and allocation 9 Computation, imputation and allocation Q Manual imputation R Manual allocation S Special processing of trips and vacations data</p> <p>BLS derived</p> | 27 | CHAR(1) |
| GIFT | <p>Was item bought for someone outside the CU? CODED 1 Yes 2 No</p> <p>BLS derived</p> | 28 | CHAR(1) |

| | | | |
|---------|--|----|---------|
| PUBFLAG | Is cost included in published bulletin? CODED 1 Not published 2 Published in Integrated Bulletin BLS derived | 29 | CHAR(1) |
| REF_MO | Reference month of this expenditure BLS derived | 30 | CHAR(2) |
| REF_YR | Reference year of this expenditure BLS derived | 32 | CHAR(4) |

4. INCOME (ITAB) FILE

The "ITAB" file, also referred to as the "Income" file, contains CU characteristics and income data. This file is created directly from the FMLY file and contains the same annual and point-of-interview data in a monthly format. It was created to facilitate computer processing when linking CU income and characteristics data with MTAB expenditure data. As such, the file structure is similar to MTAB. Each characteristic and income item is identified by UCC (See Section XIII.B. for a listing of UCCs), gift/nongift status, and month. There are no records with missing values in ITAB. If the corresponding FMLY file variable contained a missing value, there is no record for the UCC.

The following UCCs are from questions asked only in the 5th interview. Therefore, there will be no values for these UCCs for CUs in their 2nd through 4th interviews. They have been multiplied by 4 because these data are used as estimated values for those CUs not asked the questions in that particular quarter. Therefore, to be used at the micro level they should be divided by 4. For example, if a CU reports \$50,000 for value of savings account for the past 12 months, the amount of $((\$50,000*4)/12 = \$16666.67)$ is entered as the cost for each of the 3 months of the quarter for UCC 920012. It is multiplied by 4 because only one-fourth of all CUs interviewed in a quarter are asked this question (those in the fifth interview) and it is divided by 12 to make it a monthly figure. To obtain the annual value for the CU, sum the cost for the 3 months, for the following UCCs:

| | |
|--------|--------|
| 001000 | 003000 |
| 001010 | 003100 |
| 001210 | 920010 |
| 001220 | 920020 |
| 002010 | 920030 |
| 002020 | 920040 |
| 002030 | |

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|--|-----------------------|---------------|
| NEWID | CU identification number. Digits 1-7 (CU sequence number, 1 through 9999999) uniquely identify the CU. Digit 8 is the interview number, 2 through 5. It is possible for a CU to skip an interview. For example, a CU could have a 2nd, 3rd and 5th interview but no 4th interview. BLS derived | 1 | NUM(8) |
| REFMO | Reference month BLS derived | 9 | CHAR(2) |
| REFYR | Reference year BLS derived | 11 | CHAR(4) |
| UCC | Universal Classification Code See Section XIII.B. for a listing of ITAB UCC codes and titles. BLS derived | 15 | CHAR(6) |
| PUBFLAG | Is value included in published bulletin? CODED 1 Not published 2 Published in Integrated Bulletin BLS derived | 21 | CHAR(1) |
| VALUE | Value of UCC *L BLS derived | 22 | NUM(12,4) |
| VALUE_ | Value flag CODED T - Topcoded Blank - Not topcoded BLS derived | 34 | CHAR(1) |
| GIFT | Was the item a contribution to someone outside the CU? CODED 1 Yes 2 No BLS derived | 35 | CHAR(1) |

5. DETAILED EXPENDITURES (EXPN) FILES

a. SECTION 1 GENERAL SURVEY INFORMATION (APL)

PART C Major Household Appliances - For New Consumer Units Only

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|--|-----------------------|---------------|
| QYEAR | Quarter and year of the interview, for use in matching to the other files CODED 20011 2001, 1st quarter 20012 2001, 2nd quarter 20013 2001, 3rd quarter 20014 2001, 4th quarter 20021 2002, 1st quarter BLS derived | 1 | CHAR(5) |
| NEWID | CU identification number. Digits 1-7 (CU sequence number, 1 through 9999999) uniquely identify the CU. Digit 8 is the interview number, 2 through 5. It is possible for a CU to skip an interview. For example, a CU could have a 2nd, 3rd and 5th interview but no 4th interview. BLS derived | 6 | NUM(8) |
| SEQNO | Sequence number, uniquely identifies each EXPN record based on order of entries on survey questionnaire BLS derived | 14 | NUM(3) |
| ALCNO | Allocation number, field in common to all rows. Identifies rows that are the result of allocation. If ALCNO is greater than zero then the observation is a result of allocation. ALCNO can be used in conjunction with SEQNO to derive a value which has been allocated and written over with the flag H (see the notes under "ALLOCATION AND RECORD ORIGIN" for instructions). BLS derived | 17 | NUM(3) |
| REC_ORIG | Describes the origin of the record, field in common to all records (see "ALLOCATION AND RECORD ORIGIN" for the codes and their descriptions). CENSUS derived | 20 | CHAR(1) |

This file contains an inventory of major household appliances belonging to the CU. These questions are asked at the first interview and the information is carried forward to subsequent interviews through the inventory update process. Note that the title of this section on the questionnaire each user has received indicates it is asked "For New Consumer Units Only". This is because this questionnaire is used for the second through fifth interviews. The section would only be completed if a new CU had moved to the sample address, replacing an old CU that had previously participated.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|----------|---|----------------|---------|
| MAJCODE | Does your CU have any of the following appliances? CODED 01 Electric stove 02 Gas stove 03 Microwave oven 04 Other cooking stove 05 Refrigerator 06 Home freezer 07 Built-in dishwasher 08 Portable dishwasher 09 Garbage disposal 10 Clothes washer 11 Clothes dryer 12 Color televisions 13 Home computers 14 Sound components, component systems, or compact disc sound systems 15 Video tape recorder, video disc player, or video cassette recorders (VCR's) CODED BLS derived | 21 | CHAR(2) |
| MAJCODE_ | | 23 | CHAR(1) |
| MAJAPPLQ | How many of each appliance? S01C col. B | 24 | NUM(2) |
| MAJA_PLQ | | 26 | CHAR(1) |
| PURCHOWN | Purchase for own use S01C col.c | 29 | CHAR(1) |
| PURC_OWN | | 30 | CHAR(1) |
| INCLOWN | Included with owned home S 01C col.c | 31 | CHAR(1) |
| INCLOWN_ | | 32 | CHAR(1) |
| RECDGIFT | Received as a gift | 33 | CHAR(1) |

| | | | |
|----------|---------------------------|----|---------|
| | S 01C col.c | | |
| RECD_IFT | | 34 | CHAR(1) |
| INCLRENT | Included with rental unit | 35 | CHAR(1) |
| | S 01C col.c | | |
| INCL_ENT | | 36 | CHAR(1) |
| RENTSEP | Rented separately | 37 | CHAR(1) |
| | S 01C col.c | | |
| RENTSEP_ | | 38 | CHAR(1) |

b. SECTION 2 RENTED LIVING QUARTERS (RNT)

PART A CU Tenure, Rental Payments, Facilities, and Services for the Sample Unit

PART B Rental Payments, Facilities, and Services for Other Than Sample Unit

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|--|-----------------------|---------------|
| SAMP_UN | Is this the sample unit? CODED 1 This is the sample unit (=Part A). 2 This is not the sample unit (=Part B). BLS derived | 21 | CHAR(1) |
| SAMP_UN_ | | 22 | CHAR(1) |
| RNTLPRD | What period of time does this rental charge cover? CODED 4 Month 9 Other S02A/B 2b/1b | 23 | CHAR(1) |
| RNTLPRD_ | | 24 | CHAR(1) |
| RTPMTQ | Since the 1st of (<i>month, 3 months ago</i>), how many payments have been made? S02A/B 2c/1c | 25 | NUM(3) |
| RTPMTQ_ | | 28 | CHAR(1) |
| RTPMTRG | Were all the payments for the same amount? CODED | 29 | CHAR(1) |

| | | | |
|----------|---|----|---------|
| | 1 Yes 2 No | | |
| | S02A/B 2d/1d | | |
| RTPMTRG_ | | 30 | CHAR(1) |
| RTCREXP | Were any payments made during the current month? CODED 1 Yes 2 No | 31 | CHAR(1) |
| | S02A/B 2f/1f | | |
| RTCREXP_ | | 32 | CHAR(1) |
| RTELECT | Does the rental payment include the cost of electricity? CODED 1 Yes 2 No | 33 | CHAR(1) |
| | S02A/B 3a/2a | | |
| RTELECT_ | | 34 | CHAR(1) |
| RTGAS | Does the rental payment include the cost of gas? CODED 1 Yes 2 No | 35 | CHAR(1) |
| | S02A/B 3b/2b | | |
| RTGAS_ | | 36 | CHAR(1) |
| RTWATER | Does the rental payment include the cost of piped-in water? CODED 1 Yes 2 No | 37 | CHAR(1) |
| | S02A/B 3c/2c | | |
| RTWATER_ | | 38 | CHAR(1) |
| RTHEAT | Does the rental payment include the cost of heating? CODED 1 Yes 2 No | 39 | CHAR(1) |
| | S02A/B 3d/2d | | |
| RTHEAT_ | | 40 | CHAR(1) |
| RTRASH | Does the rental payment include the cost of trash/garbage collection? CODED 1 Yes | 41 | CHAR(1) |

| | | | |
|----------|---|----|----------|
| | 2 No | | |
| | S02A/B 3e/2e | | |
| RTTRASH_ | | 42 | CHAR(1) |
| RTASPAY | Did you (or any members of your CU) receive free or reduced rent for this unit as a form of pay since the first of (<i>month, 3 months ago</i>)? CODED 1 Yes 2 No | 43 | CHAR(1) |
| | S02A/B 4a/3a | | |
| RTASPAY_ | | 44 | CHAR(1) |
| RTCOMPX | What is the rental charge to another tenant for a similar unit? S02A/B 4b/3b | 45 | NUM(6) |
| | | | |
| RTCOMPX_ | | 51 | CHAR(1) |
| RTCMPPD | What period of time does this charge cover? CODED 4 Month 9 Other | 52 | CHAR(1) |
| | S02A/B 4c/3c | | |
| RTCMPPD_ | | 53 | CHAR(1) |
| RTBSNSZ | What percent of the rental payment is counted as a business expense? S02A/B 5b/4b | 62 | NUM(4,2) |
| | | | |
| RTBSNSZ_ | | 66 | CHAR(1) |
| JRTPAYQV | Quarterly value of rent received as pay BLS derived | 77 | NUM(8) |
| | | | |
| JRTP_YQV | | 85 | CHAR(1) |
| QRT3MCMX | Total rental payments made in reference period, adjusted for business and rooms rented to others. Includes extra charges for garage and parking facilities. Census derived | 86 | NUM(8) |
| | | | |
| QRT3_CMX | | 94 | CHAR(1) |

c. SECTION 3 OWNED LIVING QUARTERS AND OTHER OWNED REAL ESTATE

PART B Detailed Property Description (OPB)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|--|-----------------------|---------------|
| PROP_NOB | Property number S03B 1a | 21 | CHAR(2) |
| PROP0NOB | | 23 | CHAR(1) |
| OWNYB | Property code CODED 100 The home in which you (your CU) currently live(s) 200 A home in which you (your CU) used to live 300 A second home, vacation home or recreational property 400 Unimproved land with no buildings on it 500 Other property S03B 1b | 24 | CHAR(3) |
| OWNYB_ | | 27 | CHAR(1) |
| OBSNSZB | What percent of the expenses are deducted as business, farm or rental expenses? S03B 2b | 28 | NUM(4,2) |
| OBSNSZB_ | | 32 | CHAR(1) |
| PROPTYPE | Is this property a condominium, cooperative, or something else? (Asked if not apparent.) CODED 1 A condominium 2 A cooperative 3 Something else S03B 10 | 33 | CHAR(1) |
| PROP_YPE | | 34 | CHAR(1) |
| ACQUIRMO | In what month did you close or settle on this property? If land contract – In what month did the land contract begin? S03B 3a | 35 | CHAR(2) |
| ACQU_RMO | | 37 | CHAR(1) |
| ACQUIRYR | In what year did you close or settle on this property? (See ACQUIRMO) | 38 | CHAR(4) |

| | | | |
|----------|--|----|---------|
| | S03B 3a | | |
| ACQU_RYR | | 42 | CHAR(1) |
| ACQMETH | How did you (your CU) acquire this property? CODED 1 A purchase, a contract with a builder, or a trade-in 2 A gift or inheritance 3 Other | 43 | CHAR(1) |
| | S03B 4 | | |
| ACQMETH_ | | 44 | CHAR(1) |
| OWN_PURX | Not including closing costs, what was the total price paid for the property? | 45 | NUM(8) |
| | S03B 5 | | |
| OWN__URX | | 53 | CHAR(1) |
| OWNDPMTX | What was the amount of the down payment? | 54 | NUM(8) |
| | S03B 6 | | |
| OWND_MTX | | 62 | CHAR(1) |
| CLOSECST | About how much were the closing costs? (Includes property survey charges, title search, recording fees, transfer taxes, escrow payment, points paid by buyer, deed preparation, lawyer's fees, advertising cost, etc.) | 63 | NUM(8) |
| | S03B 7 | | |
| CLOS_CST | | 71 | CHAR(1) |
| PROPVALX | About how much do you think this property would sell for on today's market? | 72 | NUM(8) |
| | S03B 8 | | |
| PROP_ALX | | 80 | CHAR(1) |
| VSHARED | Do you (Does your CU) share ownership of this property with anyone else outside of your CU? (OWNYB = 300 only) CODED 1 Yes 2 No | 81 | CHAR(1) |
| | S03B 12 | | |
| VSHARED_ | | 82 | CHAR(1) |
| VTIMESH | Do you (Does your CU) share ownership for the entire year or is this a time-sharing arrangement where you have (your CU has) ownership of the property only for a specified time period | 83 | CHAR(1) |

each year? (OWNYB = 300 only)
 CODED
 1 Share ownership for entire year
 2 Time-sharing arrangement

S03B 13

| | | | |
|----------|---|----|---------|
| VTIM_SHR | | 84 | CHAR(1) |
| QADPTAX | Amount of annual property taxes, adjusted for business, farm, and rental expenses | 85 | NUM(10) |
| | Census derived | | |
| QADPTAX_ | | 95 | CHAR(1) |

d. SECTION 3 OWNED LIVING QUARTERS AND OTHER OWNED REAL ESTATE

PART D Disposed of Property (OPD)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|---|-----------------------|---------------|
| PROP_NOD | Property number | 21 | CHAR(2) |
| | S03D 1a | | |
| PROP0NOD | | 23 | CHAR(1) |
| OWNYD | Property code CODED 100 The home in which you (your CU) currently live(s) 200 A home in which you (your CU) used to live 300 A second home, vacation home or recreational property 400 Unimproved land with no buildings on it 500 Other property | 24 | CHAR(3) |
| | S03D 1b | | |
| OWNYD_ | | 27 | CHAR(1) |
| DISPMTHD | Did you (your CU) sell this property, give it to someone else (outside your CU), or do something else with it? CODED 1 Sold the property 2 Gave it to someone else 3 Something else | 28 | CHAR(1) |
| | S03D 2 | | |
| DISP_THD | | 29 | CHAR(1) |

| | | | |
|----------|---|----|---------|
| DISPX | What was the selling price (trade-in value)? S03D 4 | 30 | NUM(8) |
| DISPX_ | | 38 | CHAR(1) |
| DISPEXPX | What were the total expenses in selling (trading) this property? (Include commission to realtor, closing costs, points for financing, mortgage penalties, property inspection, lawyer's fees, advertising costs, deferred mortgage interest payment, etc.) S03D 5 | 39 | NUM(8) |
| DISP_XPX | | 47 | CHAR(1) |
| DISPMO | In what month did you (your CU) dispose of this property? S03D 3 | 57 | CHAR(2) |
| DISPMO_ | | 59 | CHAR(1) |
| DISPYR | In what year did you (your CU) dispose of this property? S03D 3 | 60 | CHAR(4) |
| DISPYR_ | | 64 | CHAR(1) |

e. SECTION 3 OWNED LIVING QUARTERS AND OTHER OWNED REAL ESTATE

PART F Mortgages (MOR)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|--|-----------------------|---------------|
| PROP_NOF | Property number S03F 1a | 21 | CHAR(2) |
| PROP0NOF | | 23 | CHAR(1) |
| OWNYF | Property code CODED 100 The home in which you (your CU) currently live(s) 200 A home in which you (your CU) used to live 300 A second home, vacation home or recreational property 400 Unimproved land with no buildings on it 500 Other property S03F 1b | 24 | CHAR(3) |

| | | | |
|-----------|---|----|----------|
| OWNYF_ | | 27 | CHAR(1) |
| OLDMRRT | What was the rate of interest at the time the mortgage was obtained? S03F 4 | 28 | NUM(5,4) |
| OLDMRRT_ | | 33 | CHAR(1) |
| NEWMRRT | What is the current interest rate on your (your CU's) mortgage? S03F 5 | 34 | NUM(5,4) |
| NEWMRRT_ | | 39 | CHAR(1) |
| ORGMRTX | What was the amount of the mortgage when you (your CU) obtained it, excluding any interest? S03F 8 | 40 | NUM(8) |
| ORGMRTX_ | | 48 | CHAR(1) |
| QMRTERM | Length of mortgage in years BLS derived | 49 | NUM(3) |
| QMRT_ERM | | 52 | CHAR(1) |
| M RTPMTX | On your (your CU's) last regular payment, what was the total amount you paid for those things? (See PAYPROTX for items that were included in payment. BLS mortgage edit converts all payments to monthly basis.) S03F 11 | 53 | NUM(8) |
| M RTPMTX_ | | 61 | CHAR(1) |
| M RTPMPD | How often are (were) mortgage payments due? (See NOTE under MRTPMTX.) CODED 3 Monthly S03F 9 | 62 | CHAR(1) |
| M RTPMPD_ | | 63 | CHAR(1) |
| PAYPROTX | On your (your CU's) last regular payment, which of these things were included? CODED 2 Property taxes S03F 10 | 64 | CHAR(1) |
| PAYP_OTX | | 65 | CHAR(1) |
| PAYPROIN | See PAYPROTX for question and source. | 66 | CHAR(1) |

| | | | |
|----------|---|-----|---------|
| | CODED 3 Property insurance | | |
| PAYP_OIN | | 67 | CHAR(1) |
| PAYLIFIN | See PAYPROTX for question and source. CODED 4 Life insurance | 68 | CHAR(1) |
| PAYL_FIN | | 69 | CHAR(1) |
| PAYMORIN | See PAYPROTX for question and source. CODED 5 Mortgage insurance | 70 | CHAR(1) |
| PAYM_RIN | | 71 | CHAR(1) |
| PAYOTHER | See PAYPROTX for question and source. CODED 6 Any other payments | 72 | CHAR(1) |
| PAYO_HER | | 73 | CHAR(1) |
| QESCROWX | Amount of last regular mortgage payment that went to escrow BLS derived | 74 | NUM(8) |
| QESC_OWX | | 82 | CHAR(1) |
| QPRINM1X | Amount of principal paid during first month of reference period BLS derived | 83 | NUM(8) |
| QPRI_M1X | | 91 | CHAR(1) |
| QPRINM2X | Amount of principal paid during second month of reference period BLS derived | 92 | NUM(8) |
| QPRI_M2X | | 100 | CHAR(1) |
| QPRINM3X | Amount of principal paid during third month of reference period BLS derived | 101 | NUM(8) |
| QPRI_M3X | | 109 | CHAR(1) |
| QADINT1X | Amount of interest paid during first month of reference period, adjusted for business BLS derived | 110 | NUM(8) |
| QADI_T1X | | 118 | CHAR(1) |
| QADINT2X | Amount of interest paid during second month of reference | 119 | NUM(8) |

| | | | |
|----------|--|-----|---------|
| | period, adjusted for business | | |
| | BLS derived | | |
| QADI_T2X | | 127 | CHAR(1) |
| QADINT3X | Amount of interest paid during third month of reference period, adjusted for business | 128 | NUM(8) |
| | BLS derived | | |
| QADI_T3X | | 136 | CHAR(1) |
| QRFINDAT | Month and year mortgage payment changed | 137 | CHAR(6) |
| | Census derived | | |
| QRFI_DAT | | 143 | CHAR(1) |
| FRSTPYMO | In what month did you (your CU) make your (your CU's) first payment on this mortgage? | 144 | CHAR(2) |
| | S03F 2 | | |
| FRST_YMO | | 146 | CHAR(1) |
| FRSTPYR | In what year did you (your CU) make your (your CU's) first payment on this mortgage? | 147 | CHAR(4) |
| | S03F 2 | | |
| FRST_YYR | | 151 | CHAR(1) |
| FIXEDRTE | Is this a fixed rate mortgage? CODED 1 Yes 2 No | 152 | CHAR(1) |
| | S03F 6a | | |
| FIXE_RTE | | 153 | CHAR(1) |
| PAYTYPE | Which one of these mortgages comes closest to yours (your CU's)? (NOTE: Most fixed rate mortgages will be a valid blank.) CODED 1 Fixed rate of interest 2 Variable or adjustable rate of interest 3 Graduated payment 4 Rollover or renegotiable 5 Deferred interest 6 Other | 154 | CHAR(1) |
| | S03F 6b | | |

| | | | |
|----------|--|-----|---------|
| PAYTYPE_ | | 155 | CHAR(1) |
| REFINED | Have you (Has your CU) refinanced or renegotiated this mortgage? CODED 1 Yes 2 No S03F 7 | 156 | CHAR(1) |
| REFINED_ | | 157 | CHAR(1) |
| QNEWDATE | Month and year mortgage payment changed Census derived | 158 | CHAR(6) |
| QNEW_ATE | | 164 | CHAR(1) |
| QBLNCM1X | Principal balance outstanding at beginning of month, three months ago BLS derived | 165 | NUM(8) |
| QBLN_M1X | | 173 | CHAR(1) |
| QBLNCM2X | Principal balance outstanding at beginning of month, two months ago BLS derived | 174 | NUM(8) |
| QBLN_M2X | | 182 | CHAR(1) |
| QBLNCM3X | Principal balance outstanding at beginning of month, one month ago BLS derived | 183 | NUM(8) |
| QBLN_M3X | | 191 | CHAR(1) |
| LOAN_NOF | Loan number S03F 1d | 192 | CHAR(2) |
| LOAN0NOF | | 194 | CHAR(1) |

f. SECTION 3 OWNED LIVING QUARTERS AND OTHER OWNED REAL ESTATE

PART G Lump Sum Home Equity Loans (HEL)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|---|-----------------------|---------------|
| PROP_NOG | Property number S03G 1 | 21 | CHAR(2) |
| PROP0NOG | | 23 | CHAR(1) |
| OWNYG | Property code CODED 100 The home in which you (your CU) currently live(s) 200 A home in which you (your CU) used to live 300 A second home, vacation home or recreational property 400 Unimproved land with no buildings on it 500 Other property S03G 1 | 24 | CHAR(3) |
| OWNYG_ | | 27 | CHAR(1) |
| OLDMRTG | What was the rate of interest at the time the home equity loan was obtained? S03G 4 | 28 | NUM(5,4) |
| OLDMRTG_ | | 33 | CHAR(1) |
| NEWMRTG | What is the current interest rate on your (your CU's) home equity loan? S03G 5 | 34 | NUM(5,4) |
| NEWMRTG_ | | 39 | CHAR(1) |
| ORMRTG | What was the amount of the lump sum home equity loan when you (your CU) obtained it, excluding any interest? S03G 8 | 40 | NUM(8) |
| ORMRTG_ | | 48 | CHAR(1) |
| QMRTRMG | Length of home equity loan in years BLS derived | 49 | NUM(3) |
| QMRT_RMG | | 52 | CHAR(1) |

| | | | |
|-----------|--|----|---------|
| M RTPMTG | On your (your CU's) last regular payment, what was the total amount you (your CU) paid those things? (See PAYPRTXG for items that were included in payment. BLS home equity loan edit converts all payments to monthly basis.) | 53 | NUM(8) |
| | S03G 11 | | |
| M RTPMTG_ | | 61 | CHAR(1) |
| M RTPMPG | How often are loan payments due? (See NOTE under MRTPTMG) CODED 3 Monthly | 62 | CHAR(1) |
| | S03G 9 | | |
| M RTPMPG_ | | 63 | CHAR(1) |
| PAYPRTXG | On your (your CU's) last regular payment, which of these things were included? CODED 2 Property taxes | 64 | CHAR(1) |
| | S03G 10 | | |
| PAYP_TXG | | 65 | CHAR(1) |
| PAYPRING | See PAYPRTXG for question and source. CODED 3 Property insurance | 66 | CHAR(1) |
| PAYP_ING | | 67 | CHAR(1) |
| PAYLFING | See PAYPRTXG for question and source. CODED 4 Life insurance | 68 | CHAR(1) |
| PAYL_ING | | 69 | CHAR(1) |
| PAYMRING | See PAYPRTXG for question and source. CODED 5 Mortgage guarantee insurance | 70 | CHAR(1) |
| PAYM_ING | | 71 | CHAR(1) |
| PAYOTHRG | See PAYPRTXG for question and source. CODED 6 Any other payments | 72 | CHAR(1) |
| PAYO_HRG | | 73 | CHAR(1) |
| QESCROWG | Amount of last regular home equity loan payment that went to escrow | 74 | NUM(8) |
| | BLS derived | | |

| | | | |
|----------|---|-----|---------|
| QESC_OWG | | 82 | CHAR(1) |
| QPRINM1G | Amount of principal paid during first month of reference period BLS derived | 83 | NUM(8) |
| QPRI_M1G | | 91 | CHAR(1) |
| QPRINM2G | Amount of principal paid during second month of reference period BLS derived | 92 | NUM(8) |
| QPRI_M2G | | 100 | CHAR(1) |
| QPRINM3G | Amount of principal paid during third month of reference period BLS derived | 101 | NUM(8) |
| QPRI_M3G | | 109 | CHAR(1) |
| QADINT1G | Amount of interest paid during first month of reference period, adjusted for business BLS derived | 110 | NUM(8) |
| QADI_T1G | | 118 | CHAR(1) |
| QADINT2G | Amount of interest paid during second month of reference period, adjusted for business BLS derived | 119 | NUM(8) |
| QADI_T2G | | 127 | CHAR(1) |
| QADINT3G | Amount of interest paid during third month of reference period, adjusted for business BLS derived | 128 | NUM(8) |
| QADI_T3G | | 136 | CHAR(1) |
| QRFINDTG | Month and year loan payment changed ("Old" loan record) BLS derived | 137 | CHAR(6) |
| QRFI_DTG | | 143 | CHAR(1) |
| FRSTPYMG | In what month did you (your CU) make your (your CU's) first payment on this loan? S03G 2 | 144 | CHAR(2) |
| FRST_YMG | | 146 | CHAR(1) |

| | | | |
|----------|--|-----|---------|
| FRSTPYRG | In what year did you (your CU) make your (your CU's) first payment on this loan? S03G 2 | 147 | CHAR(4) |
| FRST_YRG | | 151 | CHAR(1) |
| FIXDRTEG | Is this a fixed rate home equity loan? CODED 1 Yes 2 No S03G 6a | 152 | CHAR(1) |
| FIXD_TEG | | 153 | CHAR(1) |
| PAYTYPG | Which one of these lump sum home equity loans comes closest to yours (your CU's)? (NOTE: Most fixed rate loans will be a valid blank.) CODED 1 Fixed rate of interest 2 Variable or adjustable rate of interest 3 Graduated payment 4 Rollover or renegotiable 5 Deferred interest 6 Other S03G 6b | 154 | CHAR(1) |
| PAYTYPG_ | | 155 | CHAR(1) |
| REFINDG | Have you (Has your CU) refinanced or renegotiated this lump sum home equity loan? CODED 1 Yes 2 No S03G 7 | 156 | CHAR(1) |
| REFINDG_ | | 157 | CHAR(1) |
| QNEWDATG | Month and year loan payment changed ("New" loan record) Census derived | 158 | CHAR(6) |
| QNEW_ATG | | 164 | CHAR(1) |
| QBLNCM1G | Principal balance outstanding at beginning of month, three months ago BLS derived | 165 | NUM(8) |
| QBLN_M1G | | 173 | CHAR(1) |

| | | | |
|----------|--|-----|---------|
| QBLNCM2G | Principal balance outstanding at beginning of month, two months ago BLS derived | 174 | NUM(8) |
| QBLN_M2G | | 182 | CHAR(1) |
| QBLNCM3G | Principal balance outstanding at beginning of month, one month ago BLS derived | 183 | NUM(8) |
| QBLN_M3G | | 191 | CHAR(1) |
| LOAN_NOG | Loan number S03G 1d | 192 | CHAR(2) |
| LOAN0NOG | | 194 | CHAR(1) |

g. SECTION 3 OWNED LIVING QUARTERS AND OTHER OWNED REAL ESTATE

PART H Line of Credit Home Equity Loans (OPH)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|--|-----------------------|---------------|
| PROP_NOH | Property number S03H 1a | 21 | CHAR(2) |
| PROP0NOH | | 23 | CHAR(1) |
| OWNYH | Property code CODED 100 The home in which you (your CU) currently live(s) 200 A home in which you (your CU) used to live 300 A second home, vacation home or recreational property 400 Unimproved land with no buildings on it 500 Other property S03H 1b | 24 | CHAR(3) |
| OWNYH_ | | 27 | CHAR(1) |
| PAIDLOAN | Since the 1st of (<i>last month</i>), have you made any payments for this line of credit home equity loan? CODED 1 Yes 2 No | 28 | CHAR(1) |

| | | | |
|----------|---|----|----------|
| | S03H 2 | | |
| PAID_OAN | | 29 | CHAR(1) |
| PRINAMTX | Prior to the last payment, what was the total amount owed? | 30 | NUM(8) |
| | S03H 4 | | |
| PRIN_MTX | | 38 | CHAR(1) |
| PRIMPLUS | Interest rate used in calculation of JINTPDX (Equal to prime rate plus 1.5 percentage points) | 39 | NUM(6,4) |
| | BLS derived | | |
| PRIM_LUS | | 45 | CHAR(1) |
| JINTPDX | Estimated amount of interest paid on loan during reference period | 46 | NUM(8) |
| | BLS derived | | |
| JINTPDX_ | | 54 | CHAR(1) |
| JLCPRIX | Estimated amount of principal paid on loan during reference period *L | 55 | NUM(8) |
| | BLS derived | | |
| JLCP_INX | | 63 | CHAR(1) |
| LOAN_NOH | Loan number | 64 | CHAR(2) |
| | S03H 1d | | |
| LOAN0NOH | | 66 | CHAR(1) |

h. SECTION 3 OWNED LIVING QUARTERS AND OTHER OWNED REAL ESTATE

PART I Ownership Costs (OPI)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|-------------------------|-----------------------|---------------|
| PROP_NOI | Property number | 21 | CHAR(2) |
| | S03I 1a | | |
| PROP0NOI | | 23 | CHAR(1) |

| | | | |
|----------|--|----|----------|
| OWNYI | Property code CODED 100 The home in which you (your CU) currently live(s) 200 A home in which you (your CU) used to live 300 A second home, vacation home or recreational property 400 Unimproved land with no buildings on it 500 Other property S03I 1b | 24 | CHAR(3) |
| OWNYI_ | | 27 | CHAR(1) |
| QRENTDDZ | Percentage of owned property expenses after deducting business expenses (1.00 - OBSNSZB) Census derived | 28 | NUM(4,2) |
| QREN_DDZ | | 32 | CHAR(1) |
| QADPENTX | Amount of penalty charges on special or lump sum mortgage payment, adjusted for business Census derived | 33 | NUM(8) |
| QADP_NTX | | 41 | CHAR(1) |
| QLR3MCMX | Amount paid for ground or land rent, adjusted for business Census derived | 42 | NUM(8) |
| QLR3_CMX | | 50 | CHAR(1) |
| JFEETOTX | Amount of regular condo fee for management services, adjusted for business BLS derived | 51 | NUM(8) |
| JFEE_OTX | | 59 | CHAR(1) |
| QSPCLX | Total amount of special payments for management services, adjusted for business Census derived | 60 | NUM(8) |
| QSPCLX_ | | 68 | CHAR(1) |
| TYPEPROP | Property type CODED 1 Condominium 2 Co-op 3 Neither condo nor co-op S03I 5 | 69 | CHAR(1) |
| TYPE_ROP | | 70 | CHAR(1) |

| | | | |
|----------|--|----|---------|
| PAYHOASS | Do you (Does your CU) make regular payments to a homeowner association? (TYPEPROP = 3 only) CODED 1 Yes 2 No S03I 6 | 71 | CHAR(1) |
| PAYH_ASS | | 72 | CHAR(1) |
| PAYCONDO | Are you (Is your CU) required to make regular payments of condominium fees for general maintenance or management services? (TYPEPROP = 1 only) CODED 1 Yes 2 No S03I 7 | 73 | CHAR(1) |
| PAYC_NDO | | 74 | CHAR(1) |
| COOPRG01 | Since the 1st of (<i>month, 3 months ago</i>), for which of these things have you (has your CU) made payments directly to the cooperative for your (your CU's) share of its costs? (TYPEPROP = 2 only) CODED 01 Repayment of loans owed by cooperative S03I 8 | 75 | CHAR(2) |
| COOP_G01 | | 77 | CHAR(1) |
| COOPRG02 | See COOPRG01 for question and source. CODED 02 Property taxes | 78 | CHAR(2) |
| COOP_G02 | | 80 | CHAR(1) |
| COOPRG03 | See COOPRG01 for question and source. CODED 03 Property insurance | 81 | CHAR(2) |
| COOP_G03 | | 83 | CHAR(1) |
| COOPRG04 | See COOPRG01 for question and source. CODED 04 Management | 84 | CHAR(2) |
| COOP_G04 | | 86 | CHAR(1) |
| COOPRG05 | See COOPRG01 for question and source. CODED 05 Repairs and maintenance, including lawn care and snow removal | 87 | CHAR(2) |
| COOP_G05 | | 89 | CHAR(1) |

| | | | |
|----------|--|-----|---------|
| COOPRG06 | See COOPRG01 for question and source. CODED 06 Improvements | 90 | CHAR(2) |
| COOP_G06 | | 92 | CHAR(1) |
| COOPRG07 | See COOPRG01 for question and source. CODED 07 Recreational, including swimming, golf, and tennis facilities | 93 | CHAR(2) |
| COOP_G07 | | 95 | CHAR(1) |
| COOPRG08 | See COOPRG01 for question and source. CODED 08 Security, including guards and alarm systems | 96 | CHAR(2) |
| COOP_G08 | | 98 | CHAR(1) |
| COOPRG09 | See COOPRG01 for question and source. CODED 09 Utilities: such as gas, electricity, water, heat | 99 | CHAR(2) |
| COOP_G09 | | 101 | CHAR(1) |
| COOPRG10 | See COOPRG01 for question and source. CODED 10 Trash collection | 102 | CHAR(2) |
| COOP_G10 | | 104 | CHAR(1) |
| COOPRG11 | See COOPRG01 for question and source. CODED 11 Other | 105 | CHAR(2) |
| COOP_G11 | | 107 | CHAR(1) |
| HOCORG21 | Which of these services and privileges are included in condominium fees or regular payments to a homeowner's association? (TYPEPROP = 1 or 3 only) CODED 21 Management S03I 9 | 108 | CHAR(2) |
| HOCO_G21 | | 110 | CHAR(1) |
| HOCORG22 | See HOCORG21 for question and source. CODED 22 Repairs and maintenance, including lawn care and snow removal | 111 | CHAR(2) |
| HOCO_G22 | | 113 | CHAR(1) |
| HOCORG23 | See HOCORG21 for question and source. | 114 | CHAR(2) |

| | | | |
|----------|---|-----|---------|
| | CODED 23 Improvements | | |
| HOCO_G23 | | 116 | CHAR(1) |
| HOCORG24 | See HOCORG21 for question and source. CODED 24 Utilities: such as gas, electricity, water, heat | 117 | CHAR(2) |
| HOCO_G24 | | 119 | CHAR(1) |
| HOCORG25 | See HOCORG21 for question and source. CODED 25 Parking | 120 | CHAR(2) |
| HOCO_G25 | | 122 | CHAR(1) |
| HOCORG26 | See HOCORG21 for question and source. CODED 26 Recreational, including swimming, golf, and tennis facilities | 123 | CHAR(2) |
| HOCO_G26 | | 125 | CHAR(1) |
| HOCORG27 | See HOCORG21 for question and source. CODED 27 Security, including guards and alarm systems | 126 | CHAR(2) |
| HOCO_G27 | | 128 | CHAR(1) |
| HOCORG28 | See HOCORG21 for question and source. CODED 28 Maid service | 129 | CHAR(2) |
| HOCO_G28 | | 131 | CHAR(1) |
| HOCORG29 | See HOCORG21 for question and source. CODED 29 Medical services | 132 | CHAR(2) |
| HOCO_G29 | | 134 | CHAR(1) |
| HOCORG30 | See HOCORG21 for question and source. CODED 30 Trash collection | 135 | CHAR(2) |
| HOCO_G30 | | 137 | CHAR(1) |
| HOCORG31 | See HOCORG21 for question and source. CODED 31 Other | 138 | CHAR(2) |
| HOCO_G31 | | 140 | CHAR(1) |
| REGFEECR | Type of service or privilege: The first two digits represent the type of service (COOPRGnn or HOCORGnn); the last three | 141 | CHAR(5) |

digits are used for the allocation of utilities data (COOPRG09 or HOCORG24), and the allocation of repairs/maintenance data (COOPRG05,HOCORG22). The 3-digit utility codes can be found in Section 4, Part C under the variable UTILY. The 3-digit repairs/maintenance codes can be found in Section 5, Part B under the variable CRMCODEB. If the type of service is other than utilities or repairs/maintenance, then the last three digits are "000".

BLS derived

| | | | |
|----------|--|-----|---------|
| REGF_ECR | | 146 | CHAR(1) |
| INC_MORT | Are any of these costs included in your (your CU's) mortgage payment? CODED 1 Yes 2 No | 147 | CHAR(1) |
| S03I 10a | | | |
| INC__ORT | | 148 | CHAR(1) |
| COOPSP01 | What services were provided for any SPECIAL payments to a management service? (TYPEPROP = 2 only) CODED 01 Repayment of loans owed by cooperative 02 Property taxes 03 Property insurance 04 Management 05 Repairs and maintenance, including lawn care and snow removal 06 Improvements 07 Recreational, including swimming, golf, and tennis facilities 08 Security, including guards and alarm systems 09 Utilities: such as gas, electricity, water, heat 10 Trash collection 11 Other | 149 | CHAR(2) |
| S03I 11b | | | |
| COOP_P01 | | 151 | CHAR(1) |
| COOPSP02 | See COOPSP01 for question, codes, and source. | 152 | CHAR(2) |
| COOP_P02 | | 154 | CHAR(1) |
| COOPSP03 | See COOPSP01 for question, codes, and source. | 155 | CHAR(2) |
| COOP_P03 | | 157 | CHAR(1) |
| COOPSP04 | See COOPSP01 for question, codes, and source. | 158 | CHAR(2) |
| COOP_P04 | | 160 | CHAR(1) |

| | | | |
|----------|--|-----|---------|
| COOPSP05 | See COOPSP01 for question, codes, and source. | 161 | CHAR(2) |
| COOP_P05 | | 163 | CHAR(1) |
| COOPSP06 | See COOPSP01 for question, codes, and source. | 164 | CHAR(2) |
| COOP_P06 | | 166 | CHAR(1) |
| COOPSP07 | See COOPSP01 for question, codes, and source. | 167 | CHAR(2) |
| COOP_P07 | | 169 | CHAR(1) |
| COOPSP08 | See COOPSP01 for question, codes, and source. | 170 | CHAR(2) |
| COOP_P08 | | 172 | CHAR(1) |
| COOPSP09 | See COOPSP01 for question, codes, and source. | 173 | CHAR(2) |
| COOP_P09 | | 175 | CHAR(1) |
| COOPSP10 | See COOPSP01 for question, codes, and source. | 176 | CHAR(2) |
| COOP_P10 | | 178 | CHAR(1) |
| COOPSP11 | See COOPSP01 for question, codes, and source. | 179 | CHAR(2) |
| COOP_P11 | | 181 | CHAR(1) |
| HOCOSP01 | What services were provided for any SPECIAL payments to a management service? (TYPEPROP = 1 or 3 only) CODED 21 Management 22 Repairs and maintenance, including lawn care and snow removal 23 Improvements 24 Utilities: such as gas, electricity, water, heat 25 Parking 26 Recreational, including swimming, golf, and tennis facilities 27 Security, including guards and alarm systems 28 Maid service 29 Medical services 30 Trash collection 31 Other S03I 11b | 182 | CHAR(2) |
| HOCO_P01 | | 184 | CHAR(1) |
| HOCOSP02 | See HOCOSP01 for question, codes, and source. | 185 | CHAR(2) |
| HOCO_P02 | | 187 | CHAR(1) |
| HOCOSP03 | See HOCOSP01 for question, codes, and source. | 188 | CHAR(2) |
| HOCO_P03 | | 190 | CHAR(1) |

| | | | |
|----------|---|-----|---------|
| HOCOSP04 | See HOCOSP01 for question, codes, and source. | 191 | CHAR(2) |
| HOCO_P04 | | 193 | CHAR(1) |
| HOCOSP05 | See HOCOSP01 for question, codes, and source. | 194 | CHAR(2) |
| HOCO_P05 | | 196 | CHAR(1) |
| HOCOSP06 | See HOCOSP01 for question, codes, and source. | 197 | CHAR(2) |
| HOCO_P06 | | 199 | CHAR(1) |
| HOCOSP07 | See HOCOSP01 for question, codes, and source. | 200 | CHAR(2) |
| HOCO_P07 | | 202 | CHAR(1) |
| HOCOSP08 | See HOCOSP01 for question, codes, and source. | 203 | CHAR(2) |
| HOCO_P08 | | 205 | CHAR(1) |
| HOCOSP09 | See HOCOSP01 for question, codes, and source. | 206 | CHAR(2) |
| HOCO_P09 | | 208 | CHAR(1) |
| HOCOSP10 | See HOCOSP01 for question, codes, and source. | 209 | CHAR(2) |
| HOCO_P10 | | 211 | CHAR(1) |
| HOCOSP11 | See HOCOSP01 for question, codes, and source. | 212 | CHAR(2) |
| HOCO_P11 | | 214 | CHAR(1) |
| SPFEECR | Type of special service or privilege: Derived in same manner as REGFEECR. Type of service based on COOSPnn and HOCOSPnn. BLS derived | 215 | CHAR(5) |
| SPFEECR_ | | 220 | CHAR(1) |
| QLMPSUMX | Amount paid for mortgage in special or lump sum payments during reference period, adjusted for business Census derived | 221 | NUM(8) |
| QLMP_UMX | | 229 | CHAR(1) |
| QPENALTX | Amount of penalty charges for special or lump sum payments, adjusted for business Census derived | 230 | NUM(8) |
| QPEN_LTX | | 238 | CHAR(1) |
| QOTHERFX | Amount of regular HOA/condo fees NOT included in mortgage, adjusted for business | 239 | NUM(8) |

| | | | |
|----------|--|-----|---------|
| | Census derived | | |
| QOTH_RFX | | 247 | CHAR(1) |
| QSPASSX | Amount paid for special assessments for local projects, such as the construction or repair of roads and sidewalks, adjusted for business | 248 | NUM(8) |
| | Census derived | | |
| QSPASSX_ | | 256 | CHAR(1) |
| RNTEQVX | If someone were to rent your home today, how much do you think it would rent for monthly, unfurnished and without utilities? | 257 | NUM(6) |
| | S03I 13 | | |
| RNTEQVX_ | | 263 | CHAR(1) |

i. **SECTION 4 UTILITIES AND FUELS FOR OWNED AND RENTED PROPERTIES**

PART A Telephone Expenses (UTA)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|--|-----------------------|---------------|
| TELMO | In what month was the bill received? S 04A 4b | 24 | CHAR(2) |
| TELMO_ | | 26 | CHAR(1) |
| TELBSNZ | What percentage of the total charge will be deducted as a business expense? S04A 7b | 27 | NUM(4,2) |
| TELBSNZ_ | | 31 | CHAR(1) |
| QADBILLX | Total amount of telephone bill, adjusted for business Census derived | 38 | NUM(6) |
| QADB_LLX | | 44 | CHAR(1) |
| TELRESD | Telephone service items included in bill CODED 1 Residential services S 04A 5 | 45 | CHAR(1) |

| | | | |
|----------|--|----|---------|
| TELRESD_ | | 46 | CHAR(1) |
| TELCELL | See TELRESD for question CODED 2 Mobile/cellular service S 04A 5 | 47 | CHAR(1) |
| TELCELL_ | | 48 | CHAR(1) |
| TELPAGER | See TELRESD for question CODED 3 Pager/beeper service S 04A 5 | 49 | CHAR(1) |
| TELP_GER | | 50 | CHAR(1) |
| TELLOCAL | See TELRESD for question CODED 1 Yes, basic (local) service charge included 2 No, basic (local) service charge not included S 04A 6a.1 | 51 | CHAR(1) |
| TELL_CAL | | 52 | CHAR(1) |
| TELLONGD | See TELRESD for question CODED 1 Yes, domestic long distance charge included 2 No, domestic long distance charge not included S 04A 6a.2 | 53 | CHAR(1) |
| TELL_NGD | | 54 | CHAR(1) |
| TELINTL | See TELRESD for question CODED 1 Yes, international long distance charges included 2 No, international long distance charges not included S 04A 6a.3 | 55 | CHAR(1) |
| TELINTL_ | | 56 | CHAR(1) |
| TELSERV | See TELRESD for question CODED 1 Yes, telephone related services included 2 No, telephone related services not included S 04A 6a.4 | 57 | CHAR(1) |
| TELSERV_ | | 58 | CHAR(1) |
| TELINSL | See TELRESD for question CODED 1 Yes, installation or repair of telephone lines included 2 No, installation or repair of telephone lines not included | 59 | CHAR(1) |

| | | | |
|----------|--|----|---------|
| | S 04A 6a.5 | | |
| TELINSL_ | | 60 | CHAR(1) |
| TELPURCH | See TELRESD for question CODED 1 Yes, telephone or pager purchases or rentals included 2 No, telephone or pager purchases or rental not included | 61 | CHAR(1) |
| | S 04A 6a.6 | | |
| TELP_RCH | | 62 | CHAR(1) |
| TINTNET | See TELRESD for question CODED 1 Yes, internet access or data services included 2 No, internet access or data services not included | 63 | CHAR(1) |
| | S 04A 6a.7 | | |
| TINTNET_ | | 64 | CHAR(1) |
| TCABLE | See TELRESD for question CODED 1 Yes, cable or satellite television services included 2 No, cable or satellite television services not included | 65 | CHAR(1) |
| | S 04A 6a.8 | | |
| TCABLE_ | | 66 | CHAR(1) |
| DSLISDN | See TELRESD for question CODED 1 Yes, DSL or ISDN charges included 2 No, DSL or ISDN charges not included | 67 | CHAR(1) |
| | S 04A 6a.9 | | |
| DSLISDN_ | | 68 | CHAR(1) |
| NTRTPUR | See TELRESD for question CODED 1 Yes, non-telephone related rentals or purchases included 2 No, non-telephone related rentals or purchases not included | 69 | CHAR(1) |
| | S 04A 6a.10 | | |
| NTRTPUR_ | | 70 | CHAR(1) |
| QADINETX | Total expense for internet access or data services, adjusted for business BLS derived | 71 | NUM(6) |
| QADI_ETX | | 77 | CHAR(1) |

| | | | |
|----------|---|-----|---------|
| QADCABLX | Total expense for cable or satellite television service, adjusted for business BLS derived | 78 | NUM(6) |
| QADC_BLX | | 84 | CHAR(1) |
| QADDSLIX | Total expense for DSL or ISDN, adjusted for business BLS derived | 85 | NUM(6) |
| QADD_LIX | | 91 | CHAR(1) |
| QADNTRPX | Total expense for non-telephone related rentals and purchases, adjusted for business BLS derived | 92 | NUM(6) |
| QADN_RPX | | 98 | CHAR(1) |
| QADNTCHX | Total expense for non-telephone related services, adjusted for business BLS derived | 99 | NUM(6) |
| QADN_CHX | | 105 | CHAR(1) |
| TELRESDX | Total expense for residential service, adjusted for business BLS derived | 106 | NUM(6) |
| TELR_SDX | | 112 | CHAR(1) |
| TELCELLX | Total expense for mobile/cellular service, adjusted for business BLS derived | 113 | NUM(6) |
| TELC_LLX | | 119 | CHAR(1) |
| TELPAGRX | Total expense for pager/beeper service, adjusted for business BLS derived | 120 | NUM(6) |
| TELP_GRX | | 126 | CHAR(1) |

j. SECTION 4 UTILITIES AND FUELS FOR OWNED AND RENTED PROPERTIES

PART B Additional Telephone Expenses (UTP)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|--|-----------------------|---------------|
| QFCD3MCX | Reference period total for pre-paid phone cards minus the current month BLS derived | 21 | NUM(6) |
| QFCD_MCX | | 27 | CHAR(1) |

| | | | |
|----------|---|----|---------|
| QPYP3MCX | Reference period total for public pay phone services minus the current month BLS derived | 28 | NUM(6) |
| QPYP_MCX | | 34 | CHAR(1) |

k. SECTION 4 UTILITIES AND FUELS FOR OWNED AND RENTED PROPERTIES

PART C Screening Questions (UTB)

While the questionnaire identifies this part as screening questions, it actually collects expenditure data on utilities for rented vacation properties.

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|--|-----------------------|---------------|
| VACUTLY | Which utility or fuel for a rented vacation property was the charge for? CODED 100 Electricity 110 Natural or utility gas 120 Combined gas and electricity (100-110) 130 Fuel oil 140 Kerosene 150 Bottled or tank gas 160 Wood 170 Coal 180 Other fuels 190 Combined expenses (130-180) 200 Piped-in water 210 Trash/garbage collection 220 Sewerage maintenance 230 Combined trash/garbage/water/sewerage (200 - 220) 240 Combined trash/garbage/water (200, 210) 250 Combined trash/garbage/sewerage (210, 220) 260 Combined water/sewerage (200, 220) 270 Water softening service 280 Septic tank cleaning 290 Cable TV, satellite services or community antenna 300 Internet connection and other computer related data services not already reported 310 Combined electric/water/sewerage S 04C 2b | 21 | CHAR(3) |
| VACUTLY_ | | 24 | CHAR(1) |
| VACUTMO | In what month was the bill received? S 04C 2c | 25 | CHAR(2) |

| | | | |
|----------|---|----|---------|
| VACUTMO_ | | 27 | CHAR(1) |
| VACUTLX | What was the total amount of the charges? S 04C 2d | 28 | NUM(6) |
| VACUTLX_ | | 34 | CHAR(1) |

I. SECTION 4 UTILITIES AND FUELS FOR OWNED AND RENTED PROPERTIES

PART D Detailed Questions (UTC)

While the questionnaire identifies this part as detailed questions, it actually collects expenditure data on utilities for all properties other than rented vacation properties.

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|--|-----------------------|---------------|
| UTILY | Utility code CODED 100 Electricity 110 Natural gas 120 Combined gas and electricity (100, 110) 130 Fuel oil 140 Kerosene 150 Bottled or tank gas 160 Wood 170 Coal 180 Other fuels 190 Combined expenses (130-180) 200 Piped-in water 210 Trash/garbage collection 220 Sewer maintenance 230 Combined trash/garbage/water/sewerage (200-220) 240 Combined trash/garbage/water (200, 210) 250 Combined trash/garbage/sewerage (210, 220) 260 Combined water/sewerage (200, 220) 270 Water softening service 280 Septic tank cleaning 290 Cable TV, satellite services, or community antenna 300 Internet connection and other computer related data services not already reported 310 Combined electric/water/sewerage S 04D 1a | 21 | CHAR(3) |
| UTILY_ | | 24 | CHAR(1) |
| WHATPROP | What property were the charges for? | 25 | CHAR(2) |

CODED

- 01-20 Property number (PROP_NOB from Section 3, Part B)
- 97 Rented sample unit
- 98 Other rented unit
- 99 Property not owned or rented by CU

S 04D 2

WHAT_ROP 27 CHAR(1)

BLPERIOD What period of time was covered by the bill? 28 CHAR(1)

CODED

- 1 Month
- 2 2 months
- 3 Quarter
- 4 Other

S 04D 3

BLPE_IOD 29 CHAR(1)

BILLMO In what month was the bill received? 30 CHAR(2)

S 04D 7a

BILLMO_ 32 CHAR(1)

UTILCON What was the quantity consumed for this bill? 33 NUM(6)

S 04D 7d

UTILCON_ 39 CHAR(1)

UTLUNIT What was the unit-of-measure, such as kilowatt hours, gallons, cubic feet or therms? 40 CHAR(2)

CODED

- 10 Kilowatt hours (KWH)
- 15 Hundreds of KWH
- 20 Thousands of KWH
- 25 Cubic feet
- 30 Hundreds of cubic feet
- 35 Thousands of cubic feet
- 40 Therms
- 45 Gallons
- 50 Hundreds of gallons
- 55 Thousands of gallons
- 60 BTU's
- 65 Hundreds of BTU's
- 70 Thousands of BTU's

S 04D 7c

UTLUNIT_ 42 CHAR(1)

BILUSED Was a bill or other record used or was an estimate given? 43 CHAR(1)
Checks or checkbooks are not considered records.

CODED
 1 Records used
 2 Estimate

S 04D 7g

| | | | |
|----------|---|----|----------|
| BILUSED_ | | 44 | CHAR(1) |
| QFUELADZ | Percent of utility/fuel charge not attributable to business expenses and rooms rented to others | 47 | NUM(4,2) |
| | Census derived | | |
| QFUE_ADZ | | 51 | CHAR(1) |
| QADFULX | Amount of bill, less charges for merchandise, repairs, or other services not part of the cost of the utility, adjusted for business | 52 | NUM(6) |
| | Census derived | | |
| QADFULX_ | | 58 | CHAR(1) |
| UTLPTYPE | Property code CODED 1 The home in which you (your CU) currently live(s) or a home in which you (your CU) used to live 2 A second home, vacation home or recreational property 3 Unimproved land with no buildings on it or other property 4 Rented sample unit or other rented unit 5 Property not owned or rented by CU BLS derived | 59 | CHAR(1) |
| UTLP_YPE | | 60 | CHAR(1) |

m. **SECTION 5 CONSTRUCTION, REPAIRS, ALTERATIONS, AND MAINTENANCE OF PROPERTY**

PART A Screening Questions (CRA)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|--|-----------------------|---------------|
| CRMCODEA | What kind of job will the materials for jobs not yet started be used for? CODED 100 Dwellings under construction including a vacation or second home 110 Building an addition to the house or a new structure including porch, garage or new wing 120 Finishing a basement or an attic or enclosing a porch 130 Remodeling one or more rooms in the house 140 Landscaping the ground or planting new shrubs or trees 150 Building outdoor patios, walks, fences, or other enclosures, driveways, or permanent swimming pools 160 Repairing outdoor patios, walks, fences, driveways, or permanent swimming pools 170 Inside painting or papering 180 Outside painting 190 Plastering or paneling 200 Plumbing or water heating installations and repairs 210 Electrical work 220 Heating or air-conditioning jobs 230 Flooring repair or replacement, including inlaid linoleum or vinyl tile 240 Insulation 260 Roofing, gutters, or downspouts 270 Siding 280 Installation, repair, or replacement of window panes, screens, storm doors, awnings, and the like 290 Masonry, brick or stucco work 300 Other improvements or repairs 310 Combined expenses (100-300) S05A 6b | 21 | CHAR(3) |
| CRMC_DEA | | 24 | CHAR(1) |
| ADVMATX | Since the 1st of (<i>month, three months ago</i>), excluding the current month, what was the total cost of materials and supplies purchased for jobs not yet started? S05A 6c | 25 | NUM(6) |
| ADVMATX_ | | 31 | CHAR(1) |

| | | | |
|----------|---|----|--------|
| MATNSPCX | Since the 1st of (<i>month, three months ago</i>), excluding the current month, what was the total cost of materials and supplies purchased not for any specific job? | 32 | NUM(6) |
|----------|---|----|--------|

S05A 7b

| | | | |
|----------|--|----|---------|
| MATN_PCX | | 38 | CHAR(1) |
|----------|--|----|---------|

n. SECTION 5 CONSTRUCTION, REPAIRS, ALTERATIONS, AND MAINTENANCE OF PROPERTY

PART B Job Description (CRB)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|----------|---|----------------|---------|
| CRMCODEB | Job code for jobs in progress or completed. | 21 | CHAR(3) |
| | CODED | | |
| | 100 Dwellings under construction including a vacation or second home | | |
| | 110 Building an addition to the house or a new structure including porch, garage or new wing | | |
| | 120 Finishing a basement or an attic or enclosing a porch | | |
| | 130 Remodeling one or more rooms in the house | | |
| | 140 Landscaping the ground or planting new shrubs or trees | | |
| | 150 Building outdoor patios, walks, fences, or other enclosures, driveways, or permanent swimming pools | | |
| | 160 Repairing outdoor patios, walks, fences, driveways, or permanent swimming pools | | |
| | 170 Inside painting or papering | | |
| | 180 Outside painting | | |
| | 190 Plastering or paneling | | |
| | 200 Plumbing or water heating installations and repairs | | |
| | 210 Electrical work | | |
| | 220 Heating or air-conditioning jobs | | |
| | 230 Flooring repair or replacement, including inlaid linoleum or vinyl tile | | |
| | 240 Insulation | | |
| | 260 Roofing, gutters, or downspouts | | |
| | 270 Siding | | |
| | 280 Installation, repair, or replacement of window panes, screens, storm doors, awnings, and the like | | |
| | 290 Masonry, brick or stucco work | | |
| | 300 Other improvements or repairs | | |
| | 310 Combined expenses (100-300) | | |
| | S05B 1 | | |
| CRMC_DEB | | 24 | CHAR(1) |
| CRMPROPI | Property number | 25 | CHAR(2) |

CODED
 01-20 Property number (PROP_NOB from Section 3, Part B)
 97 Rented sample unit
 98 Other rented unit
 99 Property not owned or rented by CU

S05B 2b

CRMP_OPI 27 CHAR(1)

CRMTYPE Job classification 28 CHAR(1)

CODED
 1 Addition
 2 Alteration
 3 Replacement
 4 Maintenance and repair
 5 New construction

S05B 3b

CRMTYPE_ 29 CHAR(1)

APPCDE1 Which of these items did the job include? 30 CHAR(3)

CODED
 100 Electric cooking stove, range or oven
 110 Gas cooking stove, range or oven
 120 Microwave oven
 130 Other cooking stove, range or oven including wood, coal,
 or peat burning stoves
 140 Refrigerator
 150 Home freezer
 160 Built-in dishwasher
 170 Portable dishwasher
 180 Garbage disposal
 190 Clothes washer
 200 Clothes dryer
 210 Range hood
 250 Smoke alarms and detectors
 260 Central vacuum
 270 Trash compactor
 340 Window air conditioner
 350 Portable cooling and heating equipment, including
 portable dehumidifiers, humidifiers, fans, and space
 heaters, excluding window air conditioners
 900 Other major home appliances and equipment.
 (The codes originate from the appliance codes in Section 6,
 Parts A and B.)

S05B 7

APPCDE1_ 33 CHAR(1)

APPCDE2 See APPCDE1 for question, codes, and source. 34 CHAR(3)

APPCDE2_ 37 CHAR(1)

| | | | |
|----------|---|----|----------|
| APPCDE3 | See APPCDE1 for question, codes, and source. | 38 | CHAR(3) |
| APPCDE3_ | | 41 | CHAR(1) |
| APPCDE4 | See APPCDE1 for question, codes, and source. | 42 | CHAR(3) |
| APPCDE4_ | | 45 | CHAR(1) |
| APPCDE5 | See APPCDE1 for question, codes, and source. | 46 | CHAR(3) |
| APPCDE5_ | | 49 | CHAR(1) |
| APPCDE6 | See APPCDE1 for question, codes, and source. | 50 | CHAR(3) |
| APPCDE6_ | | 53 | CHAR(1) |
| REIMBRSZ | What percent of the total cost was (will be) reimbursed or paid by someone outside of your CU? S05B 10b | 54 | NUM(4,2) |
| REIM_RSZ | | 58 | CHAR(1) |
| CRMBSNSZ | What percent of these expenses for this job was (will be) deducted as a business expense? S05B 11b | 59 | NUM(4,2) |
| CRMB_NSZ | | 63 | CHAR(1) |
| QADLABX | Cost of labor, materials, appliances, and equipment provided by contractor since first of month, three months ago, adjusted for business and reimbursements Census derived | 64 | NUM(8) |
| QADLABX_ | | 72 | CHAR(1) |
| QADLAB3X | Cost of labor, materials, appliances, and equipment provided by contractor for month, three months ago, adjusted for business and reimbursements Census derived | 73 | NUM(8) |
| QADL_B3X | | 81 | CHAR(1) |
| QADLAB2X | Cost of labor, materials, appliances, and equipment provided by contractor for month, two months ago, adjusted for business and reimbursements Census derived | 82 | NUM(8) |
| QADL_B2X | | 90 | CHAR(1) |

| | | | |
|----------|---|-----|----------|
| QADLAB1X | Cost of labor, materials, appliances, and equipment provided by contractor for month, one month ago, adjusted for business and reimbursements | 91 | NUM(8) |
| | Census derived | | |
| QADL_B1X | | 99 | CHAR(1) |
| QADEQPX1 | Cost of appliance or equipment provided by contractor, referenced by APPCDE1, adjusted for business and reimbursements | 100 | NUM(9,2) |
| | Census derived | | |
| QADE_PX1 | | 109 | CHAR(1) |
| QADEQPX2 | Cost of appliance or equipment provided by contractor, referenced by APPCDE2, adjusted for business and reimbursements | 110 | NUM(9,2) |
| | Census derived | | |
| QADE_PX2 | | 119 | CHAR(1) |
| QADEQPX3 | Cost of appliance or equipment provided by contractor, referenced by APPCDE3, adjusted for business and reimbursements | 120 | NUM(9,2) |
| | Census derived | | |
| QADE_PX3 | | 129 | CHAR(1) |
| QADEQPX4 | Cost of appliance or equipment provided by contractor, referenced by APPCDE4, adjusted for business and reimbursements | 130 | NUM(9,2) |
| | Census derived | | |
| QADE_PX4 | | 139 | CHAR(1) |
| QADEQPX5 | Cost of appliance or equipment provided by contractor, referenced by APPCDE5, adjusted for business and reimbursements | 140 | NUM(9,2) |
| | Census derived | | |
| QADE_PX5 | | 149 | CHAR(1) |
| QADEQPX6 | Cost of appliance or equipment provided by contractor, referenced by APPCDE6, adjusted for business and reimbursements | 150 | NUM(9,2) |
| | Census derived | | |
| QADE_PX6 | | 159 | CHAR(1) |

| | | | |
|----------|---|-----|---------|
| QADPSP3X | Cost of materials, supplies, tools, or equipment purchased by CU in the month, three months ago, adjusted for business and reimbursement Census derived | 160 | NUM(8) |
| QADP_P3X | | 168 | CHAR(1) |
| QADPSP2X | Cost of materials, supplies, tools, or equipment purchased by CU in the month, two months ago, adjusted for business and reimbursement Census derived | 169 | NUM(8) |
| QADP_P2X | | 177 | CHAR(1) |
| QADPSPLX | Cost of materials, supplies, tools, or equipment purchased by CU in the month, one month ago, adjusted for business and reimbursement Census derived | 178 | NUM(8) |
| QADP_PLX | | 186 | CHAR(1) |
| QADRSP3X | Cost of tools or equipment rented by CU in the month, three months ago, adjusted for business and reimbursement Census derived | 187 | NUM(8) |
| QADR_P3X | | 195 | CHAR(1) |
| QADRSP2X | Cost of tools or equipment rented by CU in the month, two months ago, adjusted for business and reimbursement Census derived | 196 | NUM(8) |
| QADR_P2X | | 204 | CHAR(1) |
| QADRSP1X | Cost of tools or equipment rented by CU in the month, one month ago, adjusted for business and reimbursement Census derived | 205 | NUM(8) |
| QADR_PLX | | 213 | CHAR(1) |
| CRMPTYPE | Property code CODED 1 The home in which you (your CU) currently live(s) or a home in which you (your CU) used to live 2 A second home, vacation home or recreational property 3 Unimproved land with no buildings on it or other property 4 Rented sample unit or other rented unit 5 Property not owned or rented by CU BLS derived | 214 | CHAR(1) |

| | | | |
|----------|--------------------|-----|---------|
| CRMP_YPE | | 215 | CHAR(1) |
| CRMCODE | Detailed job codes | 216 | CHAR(3) |

NOTE: This variable did not undergo the Census edit process and therefore a small number of observations may have codes other than those listed below. It is not known to which type of job these codes refer.

CODED

- 101 Bathroom addition
- 102 Kitchen addition
- 103 Addition of other room in house
- 104 Addition of deck or porch
- 105 Addition of attached garage, carport or shed
- 199 Other addition
- 201 New bathroom plumbing fixture
- 202 New kitchen plumbing fixture
- 203 Other new plumbing
- 204 New insulation
- 205 New heating, ventilation and/or air conditioning
- 206 New electrical
- 207 New security system
- 208 New paneling and/or ceiling tile
- 209 New tile, vinyl and/or linoleum flooring
- 210 Other new flooring
- 211 Bathroom remodeling
- 212 Kitchen remodeling
- 213 New kitchen cabinets
- 214 Bathroom and kitchen remodeling
- 215 Finishing unfinished space
- 216 New garage door opener
- 217 New siding
- 218 Other remodeling or interior of the house
- 219 New windows and/or skylights
- 220 New doors
- 299 Other alterations
- 301 Addition of detached garage or carport
- 302 Addition of other detached building
- 303 Addition of patio or terrace
- 304 New sprinkler system, septic tank, or well
- 305 New recreational facilities
- 306 New driveway or walk
- 307 New fence
- 399 Other new outside addition or alteration
- 401 Painting
- 402 Wallpapering
- 403 Plumbing repair
- 404 Repair driveway or walk
- 405 Repair heating, ventilation or air conditioning system
- 406 Electrical repair
- 407 Repair siding
- 408 Repair roofing
- 409 Repair flooring
- 410 Repair windows or skylights

- 411 Repair doors
- 412 Repair recreational facilities
- 498 Purchase materials to have on hand
- 499 Other repairs
- 501 Replacement of plumbing fixtures
- 502 Replacement of water heater, garbage disposal, or laundry tub
- 503 Replacement of septic tank or well
- 504 Replacement of interior pipes
- 505 Replacement of heating, ventilation or air conditioning system
- 506 Replacement of wiring
- 507 Replacement of siding
- 508 Replacement of roof
- 509 Replacement of driveway or walk
- 510 Replacement of windows or skylights
- 511 Replacement of doors
- 599 Other major replacements

BLS derived

CRMCODE_ 219 CHAR(1)

o. SECTION 6 APPLIANCES, HOUSEHOLD EQUIPMENT, AND OTHER SELECTED ITEMS

PART A Purchase of Household Appliances (APA)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|----------|--|----------------|---------|
| MAJAPPLY | Item code CODED | 21 | CHAR(3) |
| | 100 Electric cooking stove, range, or oven | | |
| | 110 Gas cooking stove, range, or oven | | |
| | 120 Microwave oven | | |
| | 130 Other cooking stove, range, or oven including wood, coal, or peat burning stoves | | |
| | 140 Refrigerator | | |
| | 150 Home-freezer | | |
| | 160 Built-in dishwasher | | |
| | 170 Portable dishwasher | | |
| | 180 Garbage disposal | | |
| | 190 Clothes washer | | |
| | 200 Clothes dryer | | |
| | 210 Range hood | | |
| | 220 Combined major appliances (100-210) | | |

S06A col. c

MAJA_PLY 24 CHAR(1)

| | | | |
|----------|--|----|---------|
| GFTC_MAJ | Was this item purchased for own use, rented, or purchased as gift to others? CODED 1 Purchased for own use 2 Rented 3 Purchased for someone outside your CU S06A col. d | 25 | CHAR(1) |
| GFTC0MAJ | | 26 | CHAR(1) |
| MAJ_MO | When did you purchase it? CODED 01-12 January-December S06A col. e | 27 | CHAR(2) |
| MAJ_MO_ | | 29 | CHAR(1) |
| MAJPURX | What was the purchase price after any trade-in allowance? S06A col. f | 30 | NUM(6) |
| MAJPURX_ | | 36 | CHAR(1) |
| MAJRENTX | What was the total rental expense since the 1st of (<i>month, 3 months ago</i>), excluding the current month? (GFTC_MAJ = 2 only) S06A col. h | 39 | NUM(6) |
| MAJR_NTX | | 45 | CHAR(1) |
| MAJINSTX | How much were any extra charges for installation? S06A col. i | 46 | NUM(6) |
| MAJI_STX | | 52 | CHAR(1) |

p. SECTION 6 APPLIANCES, HOUSEHOLD EQUIPMENT, AND OTHER SELECTED ITEMS

PART B Purchase of Household Appliances and Other Selected Items (APB)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|--|-----------------------|---------------|
| MINAPPLY | Item code | 21 | CHAR(3) |
| | CODED | | |
| | 230 Small electrical kitchen appliances | | |
| | 240 Electric personal care appliances | | |
| | 250 Smoke detectors | | |
| | 260 Electric floor cleaning equipment | | |
| | 270 Other household appliances | | |
| | 280 Sewing machines | | |
| | 300 Photographic equipment | | |
| | 310 Lawnmowing machinery and other yard equipment | | |
| | 320 Power tools | | |
| | 330 Non-power tools | | |
| | 340 Window air conditioners | | |
| | 350 Portable cooling and heating equipment | | |
| | 360 Color televisions (portable and table models) | | |
| | 370 Color television consoles and combinations of TV; large screen color TV projection equipment; color monitors and other items | | |
| | 380 Black and white TV's and combinations of TV's with other items | | |
| | 390 VCR, video camera, video disc player, camcorder | | |
| | 400 Radio, all types | | |
| | 420 Tape recorders and players | | |
| | 430 Sound components, component systems, and compact disc sound systems | | |
| | 440 Other sound and video equipment, including accessories (Audio tapes are found in Section 17, Part B) | | |
| | 450 Piano, organ, or keyboard instrument | | |
| | 460 Other musical instruments, supplies, and accessories | | |
| | 470 General sports equipment (including athletic shoes for sports related use) | | |
| | 480 Health and exercise equipment | | |
| | 490 Camping equipment | | |
| | 500 Hunting and fishing equipment | | |
| | 510 Winter sports equipment | | |
| | 520 Water sports equipment | | |
| | 530 Outboard motors | | |
| | 540 Bicycles | | |
| | 550 Tricycles and battery powered riders | | |
| | 560 Playground equipment | | |
| | 570 Other sports and recreation equipment | | |
| | 590 Calculators | | |
| | 610 Telephone answering devices | | |
| | 620 Typewriters and other office machines for non-business use | | |

- 640 Computers, computer systems and related hardware for non-business use
- 650 Computer software and accessories for non-business use.
- 660 Telephones and accessories
- 670 Satellite dishes
- 800 Combined expenses (230-280, 300-350, 590, 610-620, 640-660)
- 810 Combined television, radio, video, and sound equipment expenses (360-440, 670)
- 820 Combined sports, recreation, and exercise equipment expenses (470-570)

S06B col. c

| | | | |
|----------|--|----|---------|
| MINA_PLY | | 24 | CHAR(1) |
| GFTCMIN | Was this item purchased for own use, rented, or purchased as gift to others? | 25 | CHAR(1) |
| | CODED | | |
| | 1 Purchased for own use | | |
| | 2 Rented | | |
| | 3 Purchased for someone outside your CU | | |

S06B col. d

| | | | |
|----------|---------------------------|----|---------|
| GFTCMIN_ | | 26 | CHAR(1) |
| MIN_MO | When did you purchase it? | 27 | CHAR(2) |
| | CODED | | |
| | 01-12 January-December | | |

S06B col. e

| | | | |
|---------|---|----|---------|
| MIN_MO_ | | 29 | CHAR(1) |
| MINPURX | What did this item cost? (Include delivery charges, exclude installation charges) | 30 | NUM(6) |

S06B col. f

| | | | |
|----------|---|----|---------|
| MINPURX_ | | 36 | CHAR(1) |
| MINRENTX | What was the total rental expense since the 1st of (<i>month, 3 months ago</i>), excluding the current month? (GFTCMIN = 2 only)? | 37 | NUM(6) |

S06B col. g

| | | | |
|----------|--|----|---------|
| MINR_NTX | | 43 | CHAR(1) |
|----------|--|----|---------|

q. SECTION 7 HOUSEHOLD EQUIPMENT REPAIRS, SERVICE CONTRACTS, AND FURNITURE REPAIR AND REUPHOLSTERING

PART B Household Equipment Repairs and Service Contracts (EQB)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|--|-----------------------|---------------|
| RPAIR_TYP | Identifier of cost as equipment repair or service contract CODED 1 Equipment repair 2 Service contract S07B col. b | 21 | CHAR(1) |
| RPAI_TYP | | 22 | CHAR(1) |
| APPRPRYB | Equipment repair or service contract code CODED 100 Garbage disposal, range hood, or built-in dishwasher 110 Other household appliances, including washer, refrigerator or range/oven 120 Television, radio, video, and sound equipment except those installed in automobiles or other vehicles 130 Lawn and garden equipment 140 Musical instruments and accessories 150 Hand or power tools 160 Photographic equipment 170 Sport and recreational equipment 190 Termite or pest control treatment 200 Heating or air conditioning equipment 210 Combined expenses for equipment repair (100-180, 220) or service contracts (100-200, 220) 220 Computers, computer systems and related equipment for non-business use S07B col. c | 23 | CHAR(3) |
| APPR_RYB | | 26 | CHAR(1) |
| SRVCMOB | In what month was (repair done/service contract purchased)? S07B col. d | 27 | CHAR(2) |
| SRVCMOB_ | | 29 | CHAR(1) |
| REPAIRX | What was the total cost? S07B col. e | 30 | NUM(6) |
| REPAIRX_ | | 36 | CHAR(1) |

r. **SECTION 8 HOME FURNISHINGS AND RELATED HOUSEHOLD ITEMS**

PART A Purchases (FRA)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|--|-----------------------|---------------|
| FURNPURY | Item code CODED | 21 | CHAR(3) |
| | 100 Sofas | | |
| | 101 Living room chairs | | |
| | 102 Living room tables | | |
| | 103 Modular wall units, shelves or cabinets | | |
| | 104 Ping-pong, pool tables, other similar recreation room items | | |
| | 105 Other living room, family or recreation room furniture including desks | | |
| | 106 Living room furniture combinations (100-103, 105) | | |
| | 110 All dining room and kitchen furniture | | |
| | 120 Mattresses and springs | | |
| | 121 Bedroom furniture other than mattresses and springs | | |
| | 122 Bedroom furniture combinations (120, 121) | | |
| | 130 Infants furniture | | |
| | 131 Infants equipment | | |
| | 140 Patio, porch or outdoor furniture | | |
| | 141 Outdoor equipment | | |
| | 150 All office furniture for home use | | |
| | 160 Combined furniture expenses (100-105, 110, 120, 121, 130, 140, 141, 150) | | |
| | 170 Clocks | | |
| | 171 Lamps, and other lighting fixtures | | |
| | 173 Other household decorative items | | |
| | 180 Storage items | | |
| | 181 Travel items | | |
| | 190 Plastic dinnerware | | |
| | 191 China and other dinnerware | | |
| | 192 Stainless, silver, and other flatware | | |
| | 193 Glassware | | |
| | 195 Serving pieces other than silver | | |
| | 196 Non-electric cookware | | |
| | 197 Combined kitchenware (190-196) | | |
| | 198 Silver serving pieces | | |
| | 200 Bedroom linens | | |
| | 201 Bathroom linens | | |
| | 202 Kitchen and dining room linens | | |
| | 203 Other linens | | |
| | 204 Combined linens (200-203) | | |
| | 205 Slipcovers, decorative pillows and cushions | | |
| | 210 Original wall-to-wall carpeting | | |
| | 211 Replacement wall-to-wall carpeting | | |

- 212 Room-size rugs and other non-permanent floor coverings, including carpet squares
- 214 Curtains and drapes
- 215 Venetian blinds, window shades, other window coverings
- 220 Combined expenses (170, 171, 173, 180, 190-193, 195, 196, 198, 200-203, 205, 210, 211-217)

S08A col. c

| | | | |
|----------|--|----|---------|
| FURN_URY | | 24 | CHAR(1) |
| FURNMO | In what month did you purchase the item? | 25 | CHAR(2) |

S08A col. d

| | | | |
|----------|---|----|---------|
| FURNMO_ | | 27 | CHAR(1) |
| FURNGFTC | Was this purchased for your CU or as a gift to someone outside the CU? CODED 1 For use by the CU 2 Household furnishings purchased for someone outside your CU | 28 | CHAR(1) |

S08A col. e

| | | | |
|----------|------------------------------|----|---------|
| FURN_FTC | | 29 | CHAR(1) |
| FURNPURX | What was the purchase price? | 30 | NUM(6) |

S08A col. f

s. SECTION 8 HOMEFURNISHINGS AND RELATED HOUSEHOLD ITEMS

PART B Rental, Leasing, or Repair of Furniture (FRB)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------|--|----------------|---------|
| *FURNRNTX | What was the total expense for renting or leasing furniture (last 3+ months) S08B 1b D(021) | 21 | NUM(6) |
| *FURN_NTX | D(021) | 27 | CHAR(1) |
| QFRT3MCX | Reference period total for furniture rental expense minus current month BLS derived | 28 | NUM(6) |
| QFRT_MCX | | 34 | CHAR(1) |

| | | | |
|----------|--|----|---------|
| QREP3MCX | Reference period total for furniture repair expense minus current month BLS derived | 35 | NUM(6) |
| QREP_MCX | | 41 | CHAR(1) |

t. SECTION 9 CLOTHING AND SEWING MATERIALS

PART A Clothing (CLA)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|--|-----------------------|---------------|
| CLOTHYA | Item code CODED 100 Coats, jackets, and furs 110 Sport coats and tailored jackets 120 Suits 130 Vests 140 Sweaters and sweater sets 150 Pants, slacks, and jeans 160 Shorts and short sets (excluding athletic shorts) 170 Dresses 180 Skirts 190 Shirts, blouses and tops 200 Undergarments 210 Hosiery 220 Nightwear and loungewear 230 Accessories 240 Active sportswear 250 Uniforms (for which cost is not reimbursed) 260 Costumes 270 Combined clothing (100-260) 280 Footwear (include athletic shoes not specifically purchased for sports) | 21 | CHAR(3) |
| | S09A col. c | | |
| CLOTHQA | How many of this item did you purchase? | 25 | NUM(4) |
| | S09A col. e | | |
| CLOTHQA_ | | 29 | CHAR(1) |
| CLOTHMOA | In what month did you purchase it? | 30 | CHAR(2) |
| | S09A col. f | | |
| CLOT_MOA | | 32 | CHAR(1) |

| | | | |
|----------|---|----|---------|
| CLOTHXA | How much did it cost? S09A col. g | 33 | NUM(6) |
| CLOTHXA_ | | 39 | CHAR(1) |
| AGE_SEXA | Age/sex code of person for whom clothing item was purchased CODED 1 Male, 16 and over 2 Female, 16 and over 3 Male, 2 through 15 4 Female, 2 through 15 5 Infant under 2 years BLS derived | 40 | CHAR(1) |
| AGE__EXA | | 41 | CHAR(1) |
| CLOGFTA | Identifier of purchase as gift or non-gift CODED 1 Gift 2 Non-gift BLS derived | 42 | CHAR(1) |
| CLOGFTA_ | | 43 | CHAR(1) |

u. SECTION 9 CLOTHING AND SEWING MATERIALS

PART B Infants Clothing, Watches, Jewelry and Hairpieces (CLB)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|--|-----------------------|---------------|
| CLOTHYB | Item code CODED 200 Same as Section 8, Part A - Bedroom Linens (may be present if expenditures are allocated from layettes - CLOTHYB = 330) 201 Same as Section 8, Part A - Bathroom Linens (may be present if expenditures are allocated from layettes - CLOTHYB = 330) 290 Infants coats, jackets, or snowsuits 300 Infants dresses and other outerwear 310 Infants' underwear and diapers, including disposable 320 Infants sleeping garments 330 Layettes (Allocated to codes 200, 201, 310, 320, 340) 340 Infants accessories 360 Combined clothing for infants (290-320, 340) 370 Watches 380 Jewelry 390 Hairpieces, wigs or toupees | 21 | CHAR(3) |

| | | | |
|----------|---|----|---------|
| | S09B col. c | | |
| CLOTHYB_ | | 24 | CHAR(1) |
| CLOGFTB | Was this item purchased for your CU or for someone outside of your CU? CODED 1 CU member 2 Non-CU member | 25 | CHAR(1) |
| | S09B col. d | | |
| CLOGFTB_ | | 26 | CHAR(1) |
| CLOTHQB | How many of this item did you purchase? | 27 | NUM(4) |
| | S09B col. e | | |
| CLOTHQB_ | | 31 | CHAR(1) |
| CLOTHMOB | In what month did you purchase it? | 32 | CHAR(2) |
| | S09B col. f | | |
| CLOT_MOB | | 34 | CHAR(1) |
| CLOTHXB | How much did it cost? | 35 | NUM(6) |
| | S09B col. g | | |
| CLOTHXB_ | | 41 | CHAR(1) |
| AGE_SEXB | Age/sex code of person for whom item was purchased CODED 5 Infant under 2 years Blank Purchases of watches, jewelry, hairpieces, wigs, and toupees | 42 | CHAR(1) |
| | BLS derived | | |
| AGE__EXB | | 43 | CHAR(1) |

v. **SECTION 9 CLOTHING AND SEWING MATERIALS**

PART C Sewing Materials (CLC)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|---|-----------------------|---------------|
| SEWINGY | Item code CODED 400 Sewing materials for making slipcovers, curtains, etc., and for handwork in the home including yarn 410 Sewing materials for making clothes 420 Sewing notions 430 Other sewing materials 440 Combined sewing materials (400-430) S09C col. c | 21 | CHAR(3) |
| SEWINGY_ | | 24 | CHAR(1) |
| SEWGFTC | Was this item purchased for your CU or for someone outside your CU? CODED 1 CU member 2 Non-CU member S09C col. d | 25 | CHAR(1) |
| SEWGFTC_ | | 26 | CHAR(1) |
| SEWINGMO | In what month did you purchase it? S09C col. e | 27 | CHAR(2) |
| SEWI_GMO | | 29 | CHAR(1) |
| SEWINGX | How much did it cost? S09C col. f | 30 | NUM(6) |
| SEWINGX_ | | 36 | CHAR(1) |

w. SECTION 9 CLOTHING AND SEWING MATERIALS

PART D. Clothing Services (CLD)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|---|-----------------------|---------------|
| CLOTHYD | Item code CODED 450 Repair, alteration, and tailoring for clothing and accessories 460 Shoe repair and other shoe services 470 Watch or jewelry repair 480 Clothing rental 490 Clothing storage 500 Combined expenses (450-490) S09D col. c | 21 | CHAR(3) |
| CLOTHYD_ | | 24 | CHAR(1) |
| CLSVGFTC | Was this service purchased for your CU or for someone outside your CU? CODED 1 CU member 2 Non-CU member S09D col. d | 25 | CHAR(1) |
| CLSV_FTC | | 26 | CHAR(1) |
| CLOTHMOD | In what month did you purchase it? S09D col. e | 27 | CHAR(2) |
| CLOT_MOD | | 29 | CHAR(1) |
| CLSRVCX | How much did it cost? S09D col. f | 30 | NUM(6) |
| CLSRVCX_ | | 36 | CHAR(1) |

x. SECTION 10 RENTED AND LEASED VEHICLES

PART A.1 Screening Questions (RTV)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|---|-----------------------|---------------|
| RENTCODE | Vehicle code CODED 100 Automobile 110 Truck, including vans 120 Motorized camper-coach 130 Trailer-type camper 140 Other attachable-type camper 150 Motorcycle, motor scooter or moped (motorized bicycle) 160 Boat, with a motor 170 Boat, without a motor 180 Trailer other than camper type, such as for a boat or cycle 190 Private plane 200 Any other vehicle | 21 | CHAR(3) |
| | S10A.1 2b | | |
| RENT_ODE | | 24 | CHAR(1) |
| BSNSPCTZ | What percent of the total rental expenses were (will be) deducted as business expenses, reimbursed, or paid by someone else? | 25 | NUM(3,2) |
| | S10A.1 5a / S10.2 5a | | |
| BSNS_CTZ | | 28 | CHAR(1) |
| QADRENTX | Amount paid for renting vehicle, adjusted for business Census derived | 29 | NUM(8) |
| QADR_NTX | | 37 | CHAR(1) |
| ANYVACAT | Was it rented solely for use on a vacation, overnight trip, or a trip of 75 miles or more one way? CODED 1 Yes 2 No | 47 | CHAR(1) |
| | S10A.1 3 | | |
| ANYV_CAT | | 48 | CHAR(1) |

y. SECTION 10 RENTED AND LEASED VEHICLES

PART B Detailed Questions for Leased Vehicles (LSD)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|--|-----------------------|---------------|
| LSDNUM | Vehicle number S10B 1a | 21 | CHAR(2) |
| LSDNUM_ | | 23 | CHAR(1) |
| LSDCODE | Vehicle code CODED 100 Automobile 110 Truck or van S10B 1b | 24 | CHAR(3) |
| LSDCODE_ | | 27 | CHAR(1) |
| MODELYR | What is the year of the vehicle? S10B 2 | 28 | CHAR(4) |
| MODELYR_ | | 32 | CHAR(1) |
| MODEL | What is the make and model of the vehicle? Census derived | 33 | CHAR(4) |
| MODEL_ | | 37 | CHAR(1) |
| NUMCYL | How many cylinders does it have? (0 if rotary, turbine, or electric) S10B 3 | 38 | NUM(2) |
| NUMCYL_ | | 40 | CHAR(1) |
| ANYAUTO | Does it have automatic transmission? CODED 1 Yes 2 No S10B 4a | 41 | CHAR(1) |
| ANYAUTO_ | | 42 | CHAR(1) |
| ANYSSTEER | Does it have power steering? CODED 1 Yes 2 No | 43 | CHAR(1) |

| | | | |
|----------|--|----|---------|
| | S10B 4b | | |
| ANYS_EER | | 44 | CHAR(1) |
| ANYBRAKE | Does it have power brakes? CODED 1 Yes 2 No | 45 | CHAR(1) |
| | S10B 4c | | |
| ANYB_AKE | | 46 | CHAR(1) |
| ANYAC | Does it have air conditioning? CODED 1 Yes 2 No | 47 | CHAR(1) |
| | S10B 4d | | |
| ANYAC_ | | 48 | CHAR(1) |
| ANYROOF | Does it have a sun roof? CODED 1 Yes 2 No | 49 | CHAR(1) |
| | S10B 4e | | |
| ANYROOF_ | | 50 | CHAR(1) |
| ANYTURBO | Does it have a turbo charged engine? CODED 1 Yes 2 No | 51 | CHAR(1) |
| | S10B 4f | | |
| ANYT_RBO | | 52 | CHAR(1) |
| ANYDIESL | Does it have a diesel engine? CODED 1 Yes 2 No | 53 | CHAR(1) |
| | S10B 4g | | |
| ANYD_ESL | | 54 | CHAR(1) |
| ANYWHEEL | Does it have four wheel drive? CODED 1 Yes 2 No | 55 | CHAR(1) |
| | S10B 4h | | |

| | | | |
|----------|---|----|----------|
| ANYW_EEL | | 56 | CHAR(1) |
| DOORS | How many doors does it have? (LSDCODE = 100 only) | 57 | NUM(1) |
| | S10B 5a | | |
| DOORS_ | | 58 | CHAR(1) |
| TYPEVEH | Is it a . . . ? (LSDCODE = 100 only) | 59 | CHAR(1) |
| | CODED | | |
| | 1 Station wagon | | |
| | 2 Convertible | | |
| | 3 Hatchback | | |
| | 4 Other | | |
| | S10B 5b | | |
| TYPEVEH_ | | 60 | CHAR(1) |
| PRCBSNSZ | What percent of the mileage is counted as a business expense? | 61 | NUM(3,2) |
| | S10B 6b | | |
| PRCB_NSZ | | 64 | CHAR(1) |
| MILESVEH | How many miles are currently on the vehicle? | 65 | NUM(6) |
| | S10B 7 | | |
| MILE_VEH | | 71 | CHAR(1) |
| NEWUSED | Was it new or used when first leased? | 72 | CHAR(1) |
| | CODED | | |
| | 1 New | | |
| | 2 Used | | |
| | S10B 8 | | |
| NEWUSED_ | | 73 | CHAR(1) |
| LSDSOURC | Was this vehicle leased from a . . . ? (Lessor) | 74 | CHAR(1) |
| | CODED | | |
| | 1 New or used vehicle dealer | | |
| | 2 Independent leasing company | | |
| | 3 Bank | | |
| | 4 Someplace else | | |
| | S10B 9 | | |
| LSDS_URC | | 75 | CHAR(1) |
| NUMPAY | What was the number of payments contracted for? | 76 | NUM(3) |
| | S10B 10a | | |

| | | | |
|----------|--|-----|---------|
| NUMPAY_ | | 79 | CHAR(1) |
| PMTMONTH | In what month was the first payment made? S10B 10b | 80 | CHAR(2) |
| PMTM_NTH | | 82 | CHAR(1) |
| PAYEXPX | What is the amount of each payment? S10B 10c | 83 | NUM(4) |
| PAYEXPX_ | | 87 | CHAR(1) |
| PAYTIME | What period is covered by each payment? CODED 1 Week 2 2 weeks 3 Month 4 Quarter 5 Semiannually 6 Annually 7 Other S10B 10d | 88 | CHAR(1) |
| PAYTIME_ | | 89 | CHAR(1) |
| EMPLYEXP | How much of the leasing cost is paid by an employer? S10B 11 | 90 | NUM(8) |
| EMPL_EXP | | 98 | CHAR(1) |
| TRADEEXP | How much was the trade-in allowance received? S10B 12 | 99 | NUM(8) |
| TRAD_EXP | | 107 | CHAR(1) |
| DOWNEXP | How much was the cash down payment made? S10B 13a | 108 | NUM(8) |
| DOWNEXP_ | | 116 | CHAR(1) |
| DNEMPEXP | How much of the cash down payment was paid by an employer? S10B 13b | 117 | NUM(8) |
| DNEM_EXP | | 125 | CHAR(1) |
| LSDENDMO | In what month was the lease terminated? S10B 14b | 126 | CHAR(2) |

| | | | |
|----------|---|-----|---------|
| LSDE_DMO | | 128 | CHAR(1) |
| QADPMT1X | Amount paid for all leasing charges, adjusted for business, first month of reference period | 129 | NUM(8) |
| | Census derived | | |
| QADP_T1X | | 137 | CHAR(1) |
| QADPMT2X | Amount paid for all leasing charges, adjusted for business, second month of reference period | 138 | NUM(8) |
| | Census derived | | |
| QADP_T2X | | 146 | CHAR(1) |
| QADPMT3X | Amount paid for all leasing charges, adjusted for business, third month of reference period | 147 | NUM(8) |
| | Census derived | | |
| QADP_T3X | | 155 | CHAR(1) |
| QEXTRA1X | Amount of charges other than lease amount, such as auto insurance or maintenance, adjusted for business, first month of reference period | 156 | NUM(8) |
| | Census derived | | |
| QEXT_A1X | | 164 | CHAR(1) |
| QEXTRA2X | Amount of charges other than lease amount, such as auto insurance or maintenance, adjusted for business, second month of reference period | 165 | NUM(8) |
| | Census derived | | |
| QEXT_A2X | | 173 | CHAR(1) |
| QEXTRA3X | Amount of charges other than lease amount, such as auto insurance or maintenance, adjusted for business, third month of reference period | 174 | NUM(8) |
| | Census derived | | |
| QEXT_A3X | | 182 | CHAR(1) |
| QADDOWNX | Amount of cash down payment, adjusted for business | 183 | NUM(8) |
| | Census derived | | |
| QADD_WNX | | 191 | CHAR(1) |
| QADFEEX | Amount of fees at termination of loan, adjusted for business | 192 | NUM(8) |
| | Census derived | | |

QADFEEX_

200 CHAR(1)

z. SECTION 11 OWNED VEHICLES

PART B Detailed Questions (OVB)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|--|-----------------------|---------------|
| VEHICYB | Vehicle code CODED 100 Automobile 110 Truck, including vans 120 Motorized camper-coach 130 Trailer-type camper 140 Other attachable-type camper 150 Motorcycle, motor scooter or moped (motorized bicycle) 160 Boat, with a motor 170 Boat, without a motor 180 Trailer other than camper type, such as for a boat or cycle 200 Any other vehicle | 21 | CHAR(3) |
| | S11B 1b | | |
| VEHICYB_ | | 24 | CHAR(1) |
| VEHICYR | What is the year of the vehicle? CODED 01 <= 1969 02 1970-1974 03 1975-1979 04 1980-1982 05 1983-1985 06 1986 07 1987 08 1988 09 1989 10 1990 11 1991 12 1992 13 1993 14 1994 15 1995 16 1996 17 1997 18 1998 19 1999 20 2000 21 2001 | 25 | CHAR(2) |

22 2002

BLS derived

VEHICYR_ 27 CHAR(1)

MKMDLY What is the make and model of the vehicle? 28 CHAR(4)

Census derived

MKMDLY_ 32 CHAR(1)

CYLQ How many cylinders does it have? (0 if rotary, turbine, or electric) 33 NUM(2)

S11B 4

CYLQ_ 35 CHAR(1)

AUTOTRAN Does it have automatic transmission? 36 CHAR(1)
CODED
1 Yes
2 No

S11B 5a

AUTO_RAN 37 CHAR(1)

PWRSTEER Does it have power steering? 38 CHAR(1)
CODED
1 Yes
2 No

S11B 5b

PWRS_EER 39 CHAR(1)

PWRBRAKE Does it have power brakes? 40 CHAR(1)
CODED
1 Yes
2 No

S11B 5c

PWRB_AKE 41 CHAR(1)

AIRCAR Does it have air conditioning? 42 CHAR(1)
CODED
1 Yes
2 No

S11B 5d

AIRCAR_ 43 CHAR(1)

SUNROOF Does it have a sun roof? 44 CHAR(1)

| | | | |
|----------|---|----|----------|
| | CODED 1 Yes 2 No | | |
| | S11B 5e | | |
| SUNROOF_ | | 45 | CHAR(1) |
| TURBOCHG | Does it have a turbo charged engine? CODED 1 Yes 2 No | 46 | CHAR(1) |
| | S11B 5f | | |
| TURB_CHG | | 47 | CHAR(1) |
| DIESEL | Does it have a diesel engine? CODED 1 Yes 2 No | 48 | CHAR(1) |
| | S11B 5g | | |
| DIESEL_ | | 49 | CHAR(1) |
| FRWHLDRV | Does it have four wheel drive? CODED 1 Yes 2 No | 50 | CHAR(1) |
| | S11B 5h | | |
| FRWH_DRV | | 51 | CHAR(1) |
| NUMDOOR | How many doors does it have? (VEHICYB = 100 only) | 52 | NUM(1) |
| | S11B 6a | | |
| NUMDOOR_ | | 53 | CHAR(1) |
| AUTOTYPE | Is it a . . . ? (VEHICYB = 100 only) CODED 1 Station wagon 2 Convertible 3 Hatchback 4 Other | 54 | CHAR(1) |
| | S11B 6b | | |
| AUTO_YPE | | 55 | CHAR(1) |
| VEHBSNZ | What percent of the mileage is counted as a business expense? | 56 | NUM(4,2) |
| | S11B 7b | | |

| | | | |
|----------|---|----|---------|
| VEHBSNZ_ | | 60 | CHAR(1) |
| VEHNEWU | Was it new or used when acquired? CODED 1 New 2 Used | 61 | CHAR(1) |
| | S11B 8 | | |
| VEHNEWU_ | | 62 | CHAR(1) |
| VPURSRCE | Was this vehicle purchased from . . . ? (Seller) CODED 1 Vehicle dealership 2 Private individual 3 Other | 63 | CHAR(1) |
| | S11B 9 | | |
| VPUR_RCE | | 64 | CHAR(1) |
| VEHGFTC | Was this vehicle . . . ? CODED 1 Purchased for own use 2 Purchased as gift to person outside CU 3 Received as gift | 65 | CHAR(1) |
| | S11B 10a | | |
| VEHGFTC_ | | 66 | CHAR(1) |
| VEHPURMO | In what month was it purchased? | 67 | CHAR(2) |
| | S11B 11 | | |
| VEHP_RMO | | 69 | CHAR(1) |
| VEHPURYR | In what year was it purchased? | 70 | CHAR(4) |
| | S11B 11 | | |
| VEHP_RYR | | 74 | CHAR(1) |
| VFINSTAT | On the 1st of (<i>month, 3 months ago</i>), were all loans on this vehicle paid off or were there any remaining payments to be made? CODED 1 Paid off 2 Remaining payments | 75 | CHAR(1) |
| | S11B 12b | | |
| VFIN_TAT | | 76 | CHAR(1) |
| TRADEX | How much was the trade-in allowance received? | 77 | NUM(6) |

| | | | |
|----------|---|-----|---------|
| | S11B 13b | | |
| TRADEX_ | | 83 | CHAR(1) |
| NETPURX | What was the amount paid for it after trade-in allowance and discount? | 84 | NUM(6) |
| | S11B 13c | | |
| NETPURX_ | | 90 | CHAR(1) |
| EMPLEXPX | How much of the amount or price was paid by an employer? | 91 | NUM(6) |
| | S11B 13f | | |
| EMPL_XPX | | 97 | CHAR(1) |
| DNPAYMTX | What was the amount of the cash down payment? (VFINSTAT = 2 only) | 98 | NUM(6) |
| | S11B 14 | | |
| DNPA_MTX | | 104 | CHAR(1) |
| FIN_INST | What was the source of credit? (VFINSTAT = 2 only) CODED 1 Auto dealer 2 Finance company 3 Bank 4 Credit union 5 Insurance company 6 Individual 7 Other | 105 | CHAR(1) |
| | S11B 15a | | |
| FIN__NST | | 106 | CHAR(1) |
| PRINCIPX | How much was borrowed, excluding any interest? | 107 | NUM(6) |
| | S11B 15c | | |
| PRIN_IPX | | 113 | CHAR(1) |
| VEHQPMT | What was the number of payments contracted for? | 114 | NUM(4) |
| | S11B 15d | | |
| VEHQPMT_ | | 118 | CHAR(1) |
| PMT1MO | In what month was the first payment made? | 119 | CHAR(2) |
| | S11B 15e | | |
| PMT1MO_ | | 121 | CHAR(1) |

| | | | |
|----------|---|-----|----------|
| PMT1YR | In what year was the first payment made? S11B 15e | 122 | CHAR(4) |
| PMT1YR_ | | 126 | CHAR(1) |
| PAYMENTX | What is the amount of each payment? S11B 15f | 127 | NUM(4) |
| PAYM_NTX | | 131 | CHAR(1) |
| PMTPERD | What period is covered by each payment? CODED 1 Week 2 2 weeks 3 Month 4 Quarter 5 Semiannually 6 Annually 7 Other S11B 15g | 132 | CHAR(1) |
| PMTPERD_ | | 133 | CHAR(1) |
| EXTRCHGX | How much of the payment is for charges other than principal and interest such as auto insurance or credit life insurance? S11B 15i | 134 | NUM(6) |
| EXTR_HGX | | 140 | CHAR(1) |
| QINTRSTZ | Interest rate, based on the direct ratio formula $QINTRSTZ = \frac{72 * ((VEHQPMT * PAYMENTX) - PRINCIPX)}{(((3 * PRINCIPX) * (VEHQPMT + 1)) + ((VEHQPMT * PAYMENTX) - PRINCIPX) * (VEHQPMT - 1))}$ BLS derived | 141 | NUM(5,4) |
| QINT_STZ | The following is the calculation of the next 12 variables, monthly principal, interest, balance and number of months. Note that i goes from 1 to 3. If $QINTRSTZ > 0$ then $QBALNMiX = [PRINCIPX * (1 + (QINTRSTZ/12))^{(QLOANMiQ-1)}] + [PAYMENTX * ((1 - (1 + (QINTRSTZ/12))^{(QLOANMiQ-1)}) / (QINTRSTZ/12))]$ Else if $QINTRSTZ = 0$ then $QBALNMiX = PRINCIPX - ((QLOANMiQ - 1) * PAYMENTX)$ NOTE: If $QBALNM1X < 0$ then set the following variables to blank: | 146 | CHAR(1) |

QLOANM1-3Q, QBALNM1-3X, QVINTM1-3X, QADITR1-3X,
QINTRSTZ

Else if QBALNM2X < 0 then set the following variables to blank:
QLOANM2-3Q, QBALNM2-3X, QVINTM2-3X, QVPRIM2-3X,
QADITR2-3X

Else if QBALNM3X < 0 then set the following variables to blank:
QLOANM3Q, QBALNM3X, QVINTM3X, QVPRIM3X,
QADITR3X

NOTE: If the loan has not yet begun, the variables will be set to
blank.

$QVINTMiX = QBALNMiX * (QINTRSTZ / 12)$
 $QVPRIMiX = PAYMENTX - QVINTMiX$

| | | | |
|----------|--|-----|---------|
| QLOANM1Q | Number of months since the inception of loan as of first month of reference period | 147 | NUM(4) |
| | BLS derived | | |
| QLOA_M1Q | | 151 | CHAR(1) |
| QBALNM1X | Principal balance outstanding at the beginning of first month of reference period | 152 | NUM(8) |
| | BLS derived | | |
| QBAL_M1X | | 160 | CHAR(1) |
| QVINTM1X | Amount of interest paid during first month of reference period | 161 | NUM(8) |
| | BLS derived | | |
| QVIN_M1X | | 169 | CHAR(1) |
| QVPRIM1X | Amount of principal paid during first month of reference period | 170 | NUM(8) |
| | BLS derived | | |
| QVPR_M1X | | 178 | CHAR(1) |
| QLOANM2Q | Number of months since the inception of loan as of second month of reference period | 179 | NUM(4) |
| | BLS derived | | |
| QLOA_M2Q | | 183 | CHAR(1) |
| QBALNM2X | Principal balance outstanding at the beginning of second month of reference period | 184 | NUM(8) |
| | BLS derived | | |
| QBAL_M2X | | 192 | CHAR(1) |

| | | | |
|----------|---|-----|----------|
| QVINTM2X | Amount of interest paid during second month of reference period BLS derived | 193 | NUM(8) |
| QVIN_M2X | | 201 | CHAR(1) |
| QVPRIM2X | Amount of principal paid during second month of reference period BLS derived | 202 | NUM(8) |
| QVPR_M2X | | 210 | CHAR(1) |
| QLOANM3Q | Number of months since the inception of loan as of third month of reference period BLS derived | 211 | NUM(4) |
| QLOA_M3Q | | 215 | CHAR(1) |
| QBALNM3X | Principal balance outstanding at the beginning of second month of reference period BLS derived | 216 | NUM(8) |
| QBAL_M3X | | 224 | CHAR(1) |
| QVINTM3X | Amount of interest paid during third month of reference period BLS derived | 225 | NUM(8) |
| QVIN_M3X | | 233 | CHAR(1) |
| QVPRIM3X | Amount of principal paid during third month of reference period BLS derived | 234 | NUM(8) |
| QVPR_M3X | | 242 | CHAR(1) |
| QTRADEX | Amount paid for vehicle after trade-in allowance minus amount of cost paid by employer If EMPLEXPX is not an illegal entry code: QTRADEX = NETPURX – EMPLEXPX Else If VEHBSNZ is present: QTRADEX = NETPURX - VEHBSNZ * NETPURX Else QTRADEX = NETPURX - .20 * NETPURX Census derived | 243 | NUM(8) |
| QTRADEX_ | | 251 | CHAR(1) |
| QREIMBRZ | Percent of cost paid by employer after trade-in allowance | 252 | NUM(4,2) |

(EMPLEXPX/NETPURX)

Census derived

QREI_BRZ 256 CHAR(1)

QADITR1X Amount of interest paid during first month of reference period, adjusted for business (QVINTM1X * (1-QREIMBRZ)) 257 NUM(8)

BLS derived

QADI_R1X 265 CHAR(1)

QADITR2X Amount of interest paid during second month of reference period, adjusted for business (QVINTM2X * (1-QREIMBRZ)) 266 NUM(8)

BLS derived

QADI_R2X 274 CHAR(1)

QADITR3X Amount of interest paid during third month of reference period, adjusted for business (QVINTM3X * (1-QREIMBRZ)) 275 NUM(8)

BLS derived

QADI_R3X 283 CHAR(1)

QDNPYMTX Amount of down payment, adjusted for business (DNPAYMTX * (1-QREIMBRZ)) 284 NUM(6)

Census derived

QDNP_MTX 290 CHAR(1)

VEHMILE How many miles are currently on the vehicle? (VEHICYB = 100-120, 150 only) 291 NUM(6)

S11B 10b

VEHMILE_ 297 CHAR(1)

VEHEQTLN Was the source of credit a home equity loan? (FIN_INST = 2, 3, 4 only)
CODED
1 Yes
2 No 298 CHAR(1)

S11B 15b

VEHE_TLN 299 CHAR(1)

| | | | |
|----------|----------------|-----|---------|
| VEHICIB | Vehicle number | 300 | CHAR(2) |
| | S11B 1a | | |
| VEHICIB_ | | 302 | CHAR(1) |

aa. **SECTION 11 OWNED VEHICLES**

PART C Disposal of Vehicles (OVC)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|--|-----------------------|---------------|
| VEHICYC | Vehicle code CODED 100 Automobile 110 Truck, including vans 120 Motorized camper-coach 130 Trailer-type camper 140 Other attachable-type camper 150 Motorcycle, motor scooter or moped (motorized bicycle) 160 Boat, with a motor 170 Boat, without a motor 180 Trailer other than camper type, such as for a boat or cycle 200 Any other vehicle | 21 | CHAR(3) |
| | S11C 1b | | |
| VEHICYC_ | | 24 | CHAR(1) |
| VEHDISP | How did you dispose of the vehicle? CODED 1 Sold 2 Traded in 3 Given away to someone outside the CU, including students away at school 4 Damaged beyond repair 5 Stolen 6 Other | 25 | CHAR(1) |
| | S11C 2a | | |
| VEHDISP_ | | 26 | CHAR(1) |
| VDISPMO | In what month was it disposed of? | 27 | CHAR(2) |
| | S11C 2b | | |
| VDISPMO_ | | 29 | CHAR(1) |

| | | | |
|----------|---|----|---------|
| SALEX | How much did you sell it for? (VEHDISP = 1 only) S11C 3 | 30 | NUM(6) |
| SALEX_ | | 36 | CHAR(1) |
| REIMBURX | How much did you receive for the vehicle? (VEHDISP = 4 or 5 only) S11C 4b | 37 | NUM(6) |
| REIM_URX | | 43 | CHAR(1) |
| EXREIMBX | How much will you receive for the vehicle? (VEHDISP = 4 or 5 only) S11C 4d | 44 | NUM(6) |
| EXRE_MBX | | 50 | CHAR(1) |
| LOANSTAT | Were there any outstanding loans on the vehicle when it was disposed of? CODED 1 Yes 2 No S11C 5a | 51 | CHAR(1) |
| LOAN_TAT | | 52 | CHAR(1) |
| FINPAYMX | How much was the final payment made on any outstanding loan? S11C 5c | 53 | NUM(6) |
| FINP_YMX | | 59 | CHAR(1) |
| VEHICIC | Vehicle number S11C 1a | 60 | CHAR(2) |
| VEHICIC_ | | 62 | CHAR(1) |

bb. SECTION 12 VEHICLE OPERATING EXPENSES

PART A Vehicle Maintenance and Repair, Parts, and Equipment (VEQ)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|---|-----------------------|---------------|
| VOPVEHYA | Which vehicle was the item for? CODED 100 Automobile 110 Truck, including vans 120 Motorized camper-coach 130 Trailer-type camper 140 Other attachable-type camper 150 Motorcycle, motor scooter or moped (motorized bicycle) 160 Boat, with a motor 170 Boat, without a motor 180 Trailer other than camper type, such as for a boat or cycle 200 Any other vehicle | 21 | CHAR(3) |
| | S12A col. e | | |
| VOPV_HYA | | 24 | CHAR(1) |
| VOPMOA | In what month did you have this expense? S12A col. f | 25 | CHAR(2) |
| VOPMOA_ | | 27 | CHAR(1) |
| VOPEXPX | What was the total cost? S12A col. g | 28 | NUM(6) |
| VOPEXPX_ | | 34 | CHAR(1) |
| VOPRMBXA | How much was (will be) reimbursed? S12A col. j | 35 | NUM(6) |
| VOPR_BXA | | 41 | CHAR(1) |

| | | | |
|----------|---|----|---------|
| QVOPEQPX | Amount paid for vehicle equipment or maintenance less reimbursements If VOPRMBXA is present: QVOPEQPX = VOPEXPX - VOPRMBXA Else: If VOPREIMA = 1 then QVOPEQPX = 0 If VOPREIMA = 2 then QVOPEQPX = VOPEXPX * .6 If VOPREIMA = 3 then QVOPEQPX = VOPEXPX * .5 If VOPREIMA = 4 then QVOPEQPX = VOPEXPX Census derived | 42 | NUM(8) |
| QVOP_QPX | | 50 | CHAR(1) |
| VOPSERVY | Item code CODED 100 Oil change, lubrication, and oil filter 110 Motor tune-up 120 Brake work 130 Battery purchase and installation 140 Tire purchases and mounting 150 Tire repair 160 Front end alignment, wheel balancing, and wheel rotation 170 Steering or front end work 180 Electrical system work 190 Engine repair or replacement 200 Air conditioning work 210 Engine cooling system work 300 Exhaust system work 310 Clutch or transmission work 320 Body work and painting 330 Shock absorber replacement 340 Drive shaft or rear-end work 350 Audio equipment and installation 360 Vehicle accessories and customization 370 Other vehicle services, parts, and equipment 500 Combined expenses (100-370) S12A col. c | 51 | CHAR(3) |
| VOPS_RVY | | 54 | CHAR(1) |
| VOPLABOR | Did this expense include labor? CODED 1 Yes 2 No S12A col. d | 55 | CHAR(1) |
| VOPL_BOR | | 56 | CHAR(1) |

VOPREIMB Has (Will) any of this expense been (be) reimbursed? 57 CHAR(1)
 CODED
 1 Yes
 2 No
 S12A col. i

VOPR_IMB 58 CHAR(1)

cc. **SECTION 12 VEHICLE OPERATING EXPENSES**

PART B Licensing, Registration, and Inspection of Vehicles (VLR)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|----------|--|----------------|---------|
| VOPREGY | Item code CODED 400 Driver's license 410 Vehicle inspection 415 State vehicle registration 425 Local vehicle registration 430 Combined expenses (400 - 425) S12B col. c | 21 | CHAR(3) |
| VOPREGY_ | | 24 | CHAR(1) |
| VOPMO_C | In what month did you have this expense? S12B col. d | 25 | CHAR(2) |
| VOPMO_C_ | | 27 | CHAR(1) |
| VOPREGX | What was the total amount of this expense? S12B col. e | 28 | NUM(4) |
| VOPREGX_ | | 32 | CHAR(1) |

dd. SECTION 12 VEHICLE OPERATING EXPENSES

PART C Other Vehicle Operating Expenses (VOT)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|---|-----------------------|---------------|
| VOPFLUDX | Since the 1st of (month, 3 months ago), what was the total cost of purchases of antifreeze, brake fluid, transmission fluid, or additives, except if purchased with a tune-up? Do not include purchases for vehicles used entirely for business. S12C 3b | 21 | NUM(5) |
| VOPF_UDX | | 26 | CHAR(1) |
| VOPPARKX | Since the 1st of (<i>month, 3 months ago</i>), how much was paid, excluding any payments made this month, for parking, including garage rental, metered parking and parking lot fees, except expenses included in property ownership costs? (Do not include parking expenses that are totally reimbursed or paid entirely for business.) S12C 4b | 27 | NUM(5) |
| VOPP_RKX | | 32 | CHAR(1) |
| VOPTOWX | Since the 1st of (<i>month, 3 months ago</i>), how much was paid, excluding any payments made in the current month, for towing charges, excluding contracted or pre-paid charges? S12C 4d | 33 | NUM(5) |
| VOPTOWX_ | | 38 | CHAR(1) |
| VOPDOCKX | Since the 1st of (<i>month, 3 months ago</i>), how much was paid, excluding any payments made in the current month, for docking and landing fees for boats and planes? S12C 4f | 39 | NUM(5) |
| VOPD_CKX | | 44 | CHAR(1) |
| VOPPLCYX | Since the 1st of (<i>month, 3 months ago</i>), excluding (<i>this month</i>), how much were expenses for auto repair service policies? Do not include service policies for vehicles used entirely for business. S12C 5b | 45 | NUM(5) |
| VOPP_CYX | | 50 | CHAR(1) |
| TANKGASX | Since the 1st of (<i>month, 3 months ago</i>), excluding (<i>this month</i>), | 51 | NUM(6) |

how much were expenses for bottled or tank gas for recreational vehicles, including vans, campers, and boats?

S12C 6b

| | | | |
|----------|--|----|----------|
| TANK_ASX | | 57 | CHAR(1) |
| QBSNSEPZ | Percent of expenses for gasoline and other fuels counted as business expense | 58 | NUM(4,2) |
| | Census derived | | |
| QBSN_EPZ | | 62 | CHAR(1) |
| QOIL3MCX | Amount paid for oil, other than oil included with purchase of oil change, during the reference period | 63 | NUM(8) |
| | Census derived | | |
| QOIL_MCX | | 71 | CHAR(1) |
| JGASOXQV | Quarterly expenditure on gasoline and other non-diesel fuels to operate automobiles, trucks, motorcycles, or any other vehicles, adjusted for business | 72 | NUM(8) |
| | BLS derived | | |
| JGAS_XQV | | 80 | CHAR(1) |
| JDIESXQV | Quarterly expenditure on diesel fuel to operate automobiles, trucks, motorcycles, or any other vehicles, adjusted for business | 81 | NUM(8) |
| | BLS derived | | |
| JDIE_XQV | | 89 | CHAR(1) |
| VOPCLUBX | Expense for automobile service clubs | 90 | NUM(5) |
| | S 12C 5d | | |
| VOPC_UBX | | 95 | CHAR(1) |

ee. **SECTION 13 INSURANCE OTHER THAN HEALTH**

PART B Detailed Questions (INB)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|---|-----------------------|---------------|
| POLICYIB | Policy number S13B 1a | 21 | CHAR(2) |
| POLI_YIB | | 23 | CHAR(1) |
| PLCYSTAB | Policy discontinued CODED 1 Discontinued S13B 1b | 24 | CHAR(1) |
| PLCY_TAB | | 25 | CHAR(1) |
| POLICYYB | What type of insurance is (was) it? CODED 100 Life insurance, or other policies which provide benefits in case of death or disability 200 Automobile or other vehicle insurance 300 Homeowner's insurance (Now includes fire and extended coverage insurance, previously collected separately under code 500) 400 Tenant's insurance 500 Other types of non-health insurance S13B 2b | 26 | CHAR(3) |
| POLI_YYB | | 29 | CHAR(1) |
| INSPRPY1 | Property(ies) policy covers? (PROP_NOB from Section 3, Part B) (POLICYYB = 300 or 500 only) S13B 5b | 30 | CHAR(2) |
| INSP_PY1 | | 32 | CHAR(1) |
| INSPRPY2 | See INSPRPY1 for question and source. | 33 | CHAR(2) |
| INSP_PY2 | | 35 | CHAR(1) |
| INSPRPY3 | See INSPRPY1 for question and source. | 36 | CHAR(2) |
| INSP_PY3 | | 38 | CHAR(1) |
| INSPRPY4 | See INSPRPY1 for question and source. | 39 | CHAR(2) |

| | | | |
|----------|---|----|----------|
| INSP_PY4 | | 41 | CHAR(1) |
| INSPRPY5 | See INSPRPY1 for question and source. | 42 | CHAR(2) |
| INSP_PY5 | | 44 | CHAR(1) |
| INSPRPY6 | See INSPRPY1 for question and source. | 45 | CHAR(2) |
| INSP_PY6 | | 47 | CHAR(1) |
| PREMPAID | Are the policy premiums paid . . .? (Payer) CODED 1 Entirely by CU 2 Partially by CU and partially by someone outside the CU 3 Entirely by an employer or union 4 Entirely by another group or persons outside the CU | 48 | CHAR(1) |
| | S13B 6a | | |
| PREM_AID | | 49 | CHAR(1) |
| PAYDEDPR | Are any premiums paid through payroll deductions? (PREMPAID = 1 or 2 only) CODED 1 Yes 2 No | 50 | CHAR(1) |
| | S13B 6b | | |
| PAYD_DPR | | 51 | CHAR(1) |
| PREMPERD | How often are premiums on this policy paid? (PREMPAID = 1 or 2 only) CODED 1 Weekly 2 Biweekly 3 Monthly - directly 4 Monthly - in mortgage payment 5 Quarterly 6 Semiannually 7 Annually 8 Paid-up policy 9 Other | 52 | CHAR(1) |
| | S13B 7 | | |
| PREM_ERD | | 53 | CHAR(1) |
| QINSRDDZ | Percent of vehicle expense paid by CU, adjusted for business, averaged over all owned vehicles (The percentage is derived from a variable in Section 11, Part B.) QINSRDDZ = SUM(1-VEHBSNZ)/n Census derived | 54 | NUM(4,2) |

| | | | |
|----------|--|-----|----------|
| QINS_DDZ | | 58 | CHAR(1) |
| QPROPDDZ | Percent of owned property expense paid by CU, adjusted for business, averaged over all properties. (The percentage is derived from a variable in Section 3, Part B.) | 59 | NUM(4,2) |
| | QPROPDDZ = SUM(1-OBSNSZB)/n | | |
| | Census derived | | |
| QPRO_DDZ | | 63 | CHAR(1) |
| QRTINDDZ | Percent of rented property expense paid by CU, adjusted for business, averaged over all properties. (The percentage is derived from a variable in Section 2.) | 64 | NUM(4,2) |
| | QRTINDDZ = SUM(1-RTBSNSZ)/n | | |
| | Census derived | | |
| QRTI_DDZ | | 68 | CHAR(1) |
| QVH3MCMX | Amount paid in premiums for automobile or other vehicle insurance, adjusted for business, during reference period | 69 | NUM(8) |
| | Census derived | | |
| QVH3_CMX | | 77 | CHAR(1) |
| QPR3MCMX | Amount paid in premiums for homeowner's and fire and extended coverage insurance, adjusted for business, during reference period | 78 | NUM(8) |
| | Census derived | | |
| QPR3_CMX | | 86 | CHAR(1) |
| QTN3MCMX | Amount paid in premiums for tenant's insurance, adjusted for business, during reference period | 87 | NUM(8) |
| | Census derived | | |
| QTN3_CMX | | 95 | CHAR(1) |
| QLIFCMX | Amount paid in premiums for life insurance or other policies which provide benefits in case of death during reference period | 96 | NUM(8) |
| | Census derived | | |
| QLIFCMX_ | | 104 | CHAR(1) |
| QOTHCMX | Amount paid in premiums for other types of non-health insurance during reference period | 105 | NUM(8) |

| | | | |
|----------|--|-----|---------|
| | Census derived | | |
| QOTHCMX_ | | 113 | CHAR(1) |
| INSPTYPE | Property code for insurance CODED | 114 | CHAR(1) |
| | 1 The home in which you (your CU) currently live(s) or a home in which you (your CU) used to live | | |
| | 2 A second home, vacation home or recreational property | | |
| | 3 Unimproved land with no buildings on it or other owned property | | |
| | BLS derived | | |
| INSP_YPE | | 115 | CHAR(1) |

ff. SECTION 14 HOSPITALIZATION AND HEALTH INSURANCE

PART B Detailed Questions (IHB)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|--|---------------------------|---------------|
| HHIPDLIB | Policy number | 21 | CHAR(2) |
| | S14B 1a | | |
| HHIP_LIB | | 23 | CHAR(1) |
| HHISTATB | Policy discontinued CODED | 24 | CHAR(1) |
| | 1 Discontinued | | |
| | S14B 1b | | |
| HHIS_ATB | | 25 | CHAR(1) |
| HHICOVQ | How many CU members are covered by this policy? | 26 | NUM(2) |
| | NOTE: When a CU consisting of two or more persons has reported the existence of a policy, but does not answer this question, the value for this variable defaults to 99. | | |
| | S14B 3 | | |
| HHICOVQ_ | | 28 | CHAR(1) |
| HHIGROUP | Was the policy obtained on an individual or group basis? CODED | 29 | CHAR(1) |
| | 1 Individually obtained | | |
| | 2 Group through place of employment | | |

3 Group through other organization

S14B 5

HHIG_OUP 30 CHAR(1)

HHIPRMPD 31 CHAR(1)
 By whom are the premiums paid?
 CODED
 1 Entirely by CU members
 2 Partially by CU members
 3 Entirely by an employer or union
 4 Entirely by another group or person outside of CU

S14B Q6

HHIP_MPD 32 CHAR(1)

HHIPRDED 33 CHAR(1)
 Are any of the premiums paid through payroll deductions?
 (HHIPRMPD = 1 or 2 only)
 CODED
 1 Yes
 2 No

S14B Q7

HHIP_DED 34 CHAR(1)

HHIRPMPD 35 CHAR(1)
 What period of time is covered by the regular payment?
 (HHIPRMPD = 1 or 2 only)
 CODED
 1 Week
 2 2 weeks
 3 Month
 4 Quarter
 5 6 months
 6 Year
 7 Other

S14B Q8b

HHIR_MPD 36 CHAR(1)

QHI3MCX 37 NUM(8)
 Amount paid for health insurance premiums during the reference
 period

Census derived

QHI3MCX_ 45 CHAR(1)

HHIBCBS 46 CHAR(1)
 What is the name of the insurance company? (This variable
 identifies Blue Cross/Blue Shield plans only.)
 CODED
 1 Blue Cross/Blue Shield

S14B 2

| | | | |
|----------|---|----|---------|
| HHIBCBS_ | | 47 | CHAR(1) |
| HHICODE | What type of insurance plan is it? CODED 1 Health maintenance organization 2 Fee for service plan 3 Commercial Medicare supplement 4 Other special purpose plan S14B 4a | 48 | CHAR(1) |
| HHICODE_ | | 49 | CHAR(1) |
| HHIPOS | If, except in the case of an emergency, you go to a doctor other than one in the group center or your primary care doctor, without a referral, will the plan pay any of your expenses? (HHICODE = 1 only) CODED 1 Yes 2 No S14B 4b | 50 | CHAR(1) |
| HHIPOS_ | | 51 | CHAR(1) |
| HHIFEET | Is this fee for service plan a - ? (HHICODE = 2 only) CODED 1 Traditional Fee for Service Plan 2 Preferred Provider Option Plan S14B 4c | 52 | CHAR(1) |
| HHIFEET_ | | 53 | CHAR(1) |
| HHISPECT | Is this special purpose insurance plan - ? (HHICODE = 4 only) CODED 1 Dental insurance 2 Vision insurance 3 Prescription drug insurance 4 Mental health insurance 5 Dread disease policy 6 Other type of special purpose health insurance S14B 4d | 54 | CHAR(1) |
| HHIS_ECT | | 55 | CHAR(1) |

gg. SECTION 14 HOSPITALIZATION AND HEALTH INSURANCE

PART C Medicare, Medicaid and Other Health Insurance Plans Not Directly Paid For By The CU (IHC)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|----------|---|----------------|---------|
| HHMCRENR | Are you (or any members of your CU) presently enrolled in Medicare or have you (or any members of your CU) been enrolled since the 1st of (<i>month, 3 months ago</i>)? Medicare is the Federal Health Insurance Plan. CODED 1 Yes 2 No S14C 1a | 21 | CHAR(1) |
| HHMC_ENR | | 22 | CHAR(1) |
| HHMCRCOV | How many members of your CU are covered by Medicare? (HHMCRENR = 1 only) S14C 1b | 23 | NUM(2) |
| HHMC_COV | | 25 | CHAR(1) |
| MDCDENR | Is anyone in your CU enrolled in Medicaid or has anyone in your CU been enrolled since the 1st of (<i>month, 3 months ago</i>)?? CODED 1 Yes 2 No S14C 2a | 71 | CHAR(1) |
| MDCDENR_ | | 72 | CHAR(1) |
| MDCDCOV | How many members of your CU are covered by Medicaid? (MDCDENR = 1 ONLY) S14C 2b | 73 | NUM(2) |
| MDCDCOV_ | | 75 | CHAR(1) |
| OTHPLAN | Are you (or any members of CU) covered by any plan other than Medicare or Medicaid which provides free health care such as CHAMPUS, military health care, or TRI-CARE? CODED 1 Yes 2 No S14C 3 | 121 | CHAR(1) |
| OTHPLAN_ | | 122 | CHAR(1) |

| | | | |
|----------|---|-----|----------|
| QCUMED1X | CU's combined Medicare cost in month 1? Census derived | 123 | NUM(9,2) |
| QCUM_D1X | | 132 | CHAR(1) |
| QCUMED2X | CU's combined Medicare cost in month 2? Census derived | 133 | NUM(9,2) |
| QCUM_D2X | | 142 | CHAR(1) |
| QCUMED3X | CU's combined Medicare cost in month 3? Census derived | 143 | NUM(9,2) |
| QCUM_D3X | | 152 | CHAR(1) |

hh. SECTION 15 MEDICAL AND HEALTH EXPENDITURES

PART B Payments For Medical Expenses (MDB)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|---|-----------------------|---------------|
| MEDPCARY | Item code (Payment) CODED | 21 | CHAR(3) |
| | 110 Eye examinations, treatment, or surgery | | |
| | 120 Purchase of eye glasses or contact lenses | | |
| | 130 Combined eye care services (110, 120) | | |
| | 200 Dental care | | |
| | 310 Hospital room | | |
| | 320 Hospital services | | |
| | 330 Combined hospital room and services (310, 320) | | |
| | 410 Services by medical professionals other than physician | | |
| | 420 Physician services | | |
| | 430 Combined hospital care and physicians' services (310, 320, 410, 420) | | |
| | 510 Lab tests or x-rays | | |
| | 520 Care in convalescent or nursing home | | |
| | 530 Other medical care | | |
| | 540 Combined medical care services (510-530) | | |
| | 610 Hearing aids | | |
| | 620 Prescribed medicines or prescribed drugs | | |
| | 630 Rental of supportive or convalescent equipment | | |
| | 640 Purchase of supportive or convalescent equipment | | |
| | 650 Rental of medical or surgical equipment for general use | | |
| | 660 Purchase of medical or surgical equipment for general use | | |
| | 670 Combined medicine and medical supplies (610-660) | | |

| | | | |
|----------|---|----|---------|
| | S15B col. a | | |
| MEDP_ARY | | 24 | CHAR(1) |
| MEDPGFTC | Was the person who received the care a CU member? CODED 1 Yes 2 No | 25 | CHAR(1) |
| | S15B col. b | | |
| MEDP_FTC | | 26 | CHAR(1) |
| MEDPMTMO | In what month was (were) the payment(s) made? | 27 | CHAR(2) |
| | S15B col. c | | |
| MEDP_TMO | | 29 | CHAR(1) |
| MEDPMTX | What was the amount of the payment? | 30 | NUM(8) |
| | S15B col. d | | |
| MEDPMTX_ | | 38 | CHAR(1) |

ii. **SECTION 15 MEDICAL AND HEALTH EXPENDITURES**

PART D Reimbursements For Medical Expenses (MDC)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|---|-----------------------|---------------|
| MEDRCARY | Item code (Reimbursement) CODED 110 Eye examinations, treatment, or surgery 120 Purchase of eye glasses or contact lenses 130 Combined eye care services (110, 120) 200 Dental care 310 Hospital room 320 Hospital services 330 Combined hospital room and services (310,320) 410 Services by medical professionals other than physician 420 Physician services 430 Combined hospital care and physicians' services (310, 320, 410, 420) 510 Lab tests and x-rays 520 Care in convalescent or nursing home 530 Other medical care 540 Combined medical care services (510-530) 610 Hearing aids | 21 | CHAR(3) |

- 620 Prescribed medicines or prescribed drugs
- 630 Rental of supportive or convalescent equipment
- 640 Purchase of supportive or convalescent equipment
- 650 Rental of medical or surgical equipment for general use
- 660 Purchase of medical or surgical equipment for general use
- 670 Combined medicine and medical supplies (610-660)

S15D col. a

| | | | |
|----------|--|----|---------|
| MEDR_ARY | | 24 | CHAR(1) |
| MEDRGFTC | Was the person who received the care a CU member? CODED | 25 | CHAR(1) |
| | 1 Yes | | |
| | 2 No | | |

S15D col. b

| | | | |
|----------|---|----|---------|
| MEDR_FTC | | 26 | CHAR(1) |
| MEDRMBMO | In what month was (were) the reimbursement(s) received? | 27 | CHAR(2) |

S15D col. c

| | | | |
|----------|---|----|---------|
| MEDR_BMO | | 29 | CHAR(1) |
| MEDRMBX | What was the amount of the reimbursement? | 30 | NUM(8) |

S15D col. d

| | | | |
|----------|--|----|----------|
| MEDRMBX_ | | 38 | CHAR (1) |
|----------|--|----|----------|

jj. SECTION 16 EDUCATIONAL EXPENSES (EDA)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|----------|---|----------------|---------|
| EDUC_AY | Item code | 21 | CHAR(3) |
| | CODED | | |
| | 100 Recreational lessons or other instructions for members of this CU or other persons | | |
| | 200 Nursery school or child day care centers for members of this CU or other persons | | |
| | 300 Tuition | | |
| | 310 Housing while attending school | | |
| | 320 Food or board while attending school | | |
| | 330 Combined room and board (310, 320) | | |
| | 340 Private school bus (previously captured in the XPB file under PRIVBUSX) | | |
| | 350 Purchase of any school books, supplies, or equipment which has not already been reported | | |
| | 360 Other school related expenses not already reported. (Now includes rental of any school books or equipment not already reported, previous code 340). | | |
| | 370 Combined expenses for books and tuition (300, 340-350) | | |
| | 380 Other combined educational expenses (not previously reported) (100-320, 340-360) | | |
| | S16 col. b | | |
| EDUC_AY_ | | 24 | CHAR(1) |
| EDUCGFTC | Who was the educational expense for? | 25 | CHAR(2) |
| | CODED | | |
| | 01-98 CU member (MEMBNO from MEMB file) | | |
| | 99 Someone outside CU | | |
| | S16 col. d | | |
| EDUC_FTC | | 27 | CHAR(1) |
| EDSCHL_A | What kind of school was it? | 28 | CHAR(1) |
| | CODED | | |
| | 1 College or university | | |
| | 2 Elementary or high school | | |
| | 3 Child day care center | | |
| | 4 Nursery school or preschool | | |
| | 5 Other school | | |
| | S16 col. e | | |
| EDSC_L_A | | 29 | CHAR(1) |

| | | | |
|----------|---|----|---------|
| EDMONTHA | In what month was the payment made? S16 col. f | 30 | CHAR(2) |
| EDMO_THA | | 32 | CHAR(1) |
| EDREIMBX | How much of the payment was or will be reimbursed? S16 col. i | 33 | NUM(8) |
| EDRE_MBX | | 41 | CHAR(1) |
| JEDUCNET | Net amount paid for educational expenses during reference period BLS derived | 42 | NUM(8) |
| JEDU_NET | | 50 | CHAR(1) |

kk. SECTION 17 SUBSCRIPTIONS, MEMBERSHIPS, BOOKS, AND ENTERTAINMENT EXPENSES

PART A Subscriptions and Memberships (SUB)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|---|-----------------------|---------------|
| S17CODEA | Item code CODED 100 Newspaper delivery 200 Books purchased from a book club 300 Compact discs, tapes, videos, or records purchased from a mail-order club 400 Magazines or periodical subscriptions 500 Theater, concert, opera, or other musical series, season tickets. 600 Season tickets to sporting events 700 Encyclopedias or other sets of reference books 800 Country clubs, health clubs, swimming pools, tennis clubs, social or other recreational organizations 810 Civic, service, or fraternal organizations 820 Credit card membership fees 840 Shopping club membership such as Costco and Sam's 900 Reference books not in sets S17A col. b | 21 | CHAR(3) |
| S17C_DEA | | 24 | CHAR(1) |
| S17GFTCA | Was subscription or membership expense purchased for own use or as a gift? CODED | 25 | CHAR(1) |

- 1 Purchased for CU
- 2 Purchased for someone outside CU

S17A col. d

| | | | |
|----------|---|----|---------|
| S17G_TCA | | 26 | CHAR(1) |
| QSUB3MCX | Amount paid for subscriptions and memberships during reference period | 27 | NUM(8) |
| | Census derived | | |
| QSUB_MCX | | 35 | CHAR(1) |

II. SECTION 17 SUBSCRIPTIONS, MEMBERSHIPS, BOOKS, AND ENTERTAINMENT EXPENSES

PART B Books and Entertainment Expenses (ENT)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|--|-----------------------|---------------|
| QPSF3MCX | Amount paid in fees for participating in sports such as tennis, golf, bowling, or swimming during the reference period | 21 | NUM(8) |
| | Census derived | | |
| QPSF_MCX | | 29 | CHAR(1) |
| QSSF3MCX | Amount paid for single admissions to spectator sporting events such as football, baseball, hockey, or soccer during the reference period | 30 | NUM(8) |
| | Census derived | | |
| QSSF_MCX | | 38 | CHAR(1) |
| QEAD3MCX | Amount paid for single admissions to entertainment activities such as movies, plays, operas, or concerts during the reference period | 39 | NUM(8) |
| | Census derived | | |
| QEAD_MCX | | 47 | CHAR(1) |
| QBK3MCMX | Amount paid for books, including paperbacks, not purchased through a book club during the reference period (excluding encyclopedias or school books) | 48 | NUM(8) |
| | Census derived | | |
| QBK3_CMX | | 56 | CHAR(1) |

| | | | |
|----------|---|-----|---------|
| QMG3MCMX | Amount paid for magazines not included in a subscription during the reference period | 57 | NUM(8) |
| | Census derived | | |
| QMG3_CMX | | 65 | CHAR(1) |
| QNEW3MCX | Amount paid for single copies of newspapers (non-subscription) during the reference period | 66 | NUM(8) |
| | Census derived | | |
| QNEW_MCX | | 74 | CHAR(1) |
| QREC3MCX | Amount paid for compact discs, audio tapes, needles, or records other than through a mail-order club during the reference period | 75 | NUM(8) |
| | Census derived | | |
| QREC_MCX | | 83 | CHAR(1) |
| QFLM3MCX | Amount paid for photographic film during the reference period | 84 | NUM(8) |
| | Census derived | | |
| QFLM_MCX | | 92 | CHAR(1) |
| QFLP3MCX | Amount paid for film processing during the reference period | 93 | NUM(8) |
| | Census derived | | |
| QFLP_MCX | | 101 | CHAR(1) |
| QPVD3MCX | Amount paid for purchase of video cassettes, video tapes, or video discs other than through a mail-order club during the reference period | 102 | NUM(8) |
| | Census derived | | |
| QPVD_MCX | | 110 | CHAR(1) |
| QRVD3MCX | Amount paid for rental of video cassettes, video tapes, or video discs during the reference period | 111 | NUM(8) |
| | Census derived | | |
| QRVD_MCX | | 119 | CHAR(1) |

mm. **SECTION 18 TRIPS AND VACATIONS (TRV)**

PART B Trips Paid Entirely By CU
PART C Partially Reimbursed Trips

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|----------|--|----------------|---------|
| TYPETRIP | Trip type CODED 1 Visit relatives or friends 2 Business 3 Sightseeing, sports, etc. 4 Any other 5 Day trips S18A col. c | 21 | CHAR(1) |
| TYPE_RIP | | 22 | CHAR(1) |
| WHATPART | In what part of Section 18 of the questionnaire were trip expenses recorded? CODED 1 Part B 2 Part C BLS derived | 23 | CHAR(1) |
| WHAT_ART | | 24 | CHAR(1) |
| TRIPIDBC | Trip identification number S18B/C 1a | 25 | NUM(2) |
| TRIP_DBC | | 27 | CHAR(1) |
| NUMSAME | Number of identical trips S18B/C 1c | 28 | NUM(2) |
| NUMSAME_ | | 30 | CHAR(1) |
| EOTRIPMO | Month ended CODED 01-12 January-December 13 Trip not yet ended S18B/C 1d | 31 | CHAR(2) |
| EOTR_PMO | | 33 | CHAR(1) |

| | | | |
|----------|---|----|---------|
| NUMNIGHT | How many nights did you (or any members of your CU) spend away from home on this trip? S18B/C 1g | 34 | NUM(3) |
| NUMN_GHT | | 37 | CHAR(1) |
| FOODDEAL | Did the package deal include food and beverages? CODED 1 Yes 2 No S18B/C 2b | 38 | CHAR(1) |
| FOOD_EAL | | 39 | CHAR(1) |
| LODGDEAL | Did the package deal include lodging? CODED 1 Yes 2 No S18B/C 2b | 40 | CHAR(1) |
| LODG_EAL | | 41 | CHAR(1) |
| TRANDEAL | Did the package deal include transportation? CODED 1 Yes 2 No S18B/C 2b | 42 | CHAR(1) |
| TRAN_EAL | | 43 | CHAR(1) |
| ELSEDEAL | Did the package deal include anything else? CODED 1 Yes 2 No S18B/C 2b | 44 | CHAR(1) |
| ELSE_EAL | | 45 | CHAR(1) |
| CMLOCALY | Starting at the beginning of this trip, please tell me all the kinds of transportation you (or any members of your CU) used from the time you (they) left home to the time you (they) got back home. CODED 01 Local (taxi, etc.) S18B/C 3a | 46 | CHAR(2) |
| CMLO_ALY | | 48 | CHAR(1) |

| | | | |
|----------|---|----|---------|
| CMPLANEY | See CMLOCALY for question and source. CODED 02 Commercial airplane | 49 | CHAR(2) |
| CMPL_NEY | | 51 | CHAR(1) |
| CMTRAINY | See CMLOCALY for question and source. CODED 03 Train | 52 | CHAR(2) |
| CMTR_INY | | 54 | CHAR(1) |
| CMBUSY | See CMLOCALY for question and source. CODED 04 Bus | 55 | CHAR(2) |
| CMBUSY_ | | 57 | CHAR(1) |
| CMSHIPY | See CMLOCALY for question and source. CODED 05 Ship | 58 | CHAR(2) |
| CMSHIPY_ | | 60 | CHAR(1) |
| RTCARY | See CMLOCALY for question and source. CODED 06 Rented car or jeep | 61 | CHAR(2) |
| RTCARY_ | | 63 | CHAR(1) |
| RTTRUCKY | See CMLOCALY for question and source. CODED 07 Rented truck or van | 64 | CHAR(2) |
| RTTR_CKY | | 66 | CHAR(1) |
| RTMOPEDY | See CMLOCALY for question and source. CODED 08 Rented motorcycle or moped | 67 | CHAR(2) |
| RTMO_EDY | | 69 | CHAR(1) |
| RTPLANEY | See CMLOCALY for question and source. CODED 09 Rented private plane | 70 | CHAR(2) |
| RTPL_NEY | | 72 | CHAR(1) |
| RTBOATY | See CMLOCALY for question and source. CODED 10 Rented boat or trailer | 73 | CHAR(2) |
| RTBOATY_ | | 75 | CHAR(1) |

| | | | |
|----------|--|-----|---------|
| RTCAMPY | See CMLOCALY for question and source. CODED 11 Rented camper | 76 | CHAR(2) |
| RTCAMPY_ | | 78 | CHAR(1) |
| RTOTHERY | See CMLOCALY for question and source. CODED 12 Other rented vehicles | 79 | CHAR(2) |
| RTOT_ERY | | 81 | CHAR(1) |
| PVCARY | See CMLOCALY for question and source. CODED 13 Car owned by CU | 82 | CHAR(2) |
| PVCARY_ | | 84 | CHAR(1) |
| PVLEASEY | See CMLOCALY for question and source. CODED 14 Vehicle leased by CU | 85 | CHAR(2) |
| PVLE_SEY | | 87 | CHAR(1) |
| PVOTHERY | See CMLOCALY for question and source. CODED 15 Other vehicle owned by CU | 88 | CHAR(2) |
| PVOT_ERY | | 90 | CHAR(1) |
| PVELSEY | See CMLOCALY for question and source. CODED 16 Vehicle owned by someone else | 91 | CHAR(2) |
| PVELSEY_ | | 93 | CHAR(1) |
| PVTRANSY | See CMLOCALY for question and source. CODED 17 Other transport | 94 | CHAR(2) |
| PVTR_NSY | | 96 | CHAR(1) |
| CMLOCALX | Amount spent for local transportation (taxi, etc.) BLS derived | 97 | NUM(8) |
| CMLO_ALX | | 105 | CHAR(1) |
| CMPLANEX | Amount spent for commercial airplanes BLS derived | 106 | NUM(8) |
| CMPL_NEX | | 114 | CHAR(1) |

| | | | |
|----------|---|-----|---------|
| CMTRAINX | Amount spent for trains BLS derived | 115 | NUM(8) |
| CMTR_INX | | 123 | CHAR(1) |
| CMBUSX | Amount spent for buses BLS derived | 124 | NUM(8) |
| CMBUSX_ | | 132 | CHAR(1) |
| CMSHIPX | Amount spent for ships BLS derived | 133 | NUM(8) |
| CMSHIPX_ | | 141 | CHAR(1) |
| RTCARX | Amount spent for rented cars or jeeps not including gas you (or any members of your CU) bought BLS derived | 142 | NUM(8) |
| RTCARX_ | | 150 | CHAR(1) |
| RTTRUCKX | Amount spent for rented trucks or vans not including gas you (or any members of your CU) bought BLS derived | 151 | NUM(8) |
| RTTR_CKX | | 159 | CHAR(1) |
| RTMOPEDX | Amount spent for rented motorcycles or mopeds not including gas you (or any members of your CU) bought BLS derived | 160 | NUM(8) |
| RTMO_EDX | | 168 | CHAR(1) |
| RTPLANEX | Amount spent for rented private planes not including gas you (or any members of your CU) bought BLS derived | 169 | NUM(8) |
| RTPL_NEX | | 177 | CHAR(1) |
| RTBOATX | Amount spent for rented boats or trailers not including gas you (or any members of your CU) bought BLS derived | 178 | NUM(8) |
| RTBOATX_ | | 186 | CHAR(1) |
| RTCAMPX | Amount spent for rented campers not including gas you (or any members of your CU) bought BLS derived | 187 | NUM(8) |

| | | | |
|----------|---|-----|---------|
| RTCAMPX_ | | 195 | CHAR(1) |
| RTOTHERX | Amount spent for other rented vehicles not including gas you (or any members of your CU) bought | 196 | NUM(8) |
| | BLS derived | | |
| RTOT_ERX | | 204 | CHAR(1) |
| GASOILX | How much did you (or any members of your CU) spend for gasoline, oil, diesel fuel, or any other fuels? | 205 | NUM(8) |
| | S18B/C 5b | | |
| GASOILX_ | | 213 | CHAR(1) |
| TRPTOLLX | How much did you (or any members of your CU) spend for tolls? | 214 | NUM(6) |
| | S18B/C 5d | | |
| TRPT_LLX | | 220 | CHAR(1) |
| PARKINGX | How much did you (or any members of your CU) spend for parking fees? | 221 | NUM(8) |
| | S18B/C 5f | | |
| PARK_NGX | | 229 | CHAR(1) |
| LDGCOSTX | Cost for hotels, motels, cottages, trailer camps, or other lodging, including taxes and tips | 230 | NUM(8) |
| | BLS derived | | |
| LDGC_STX | | 238 | CHAR(1) |
| TRPALCHX | Cost for alcoholic beverages at restaurants, bars, or fast food places, including taxes and tips | 239 | NUM(6) |
| | BLS derived | | |
| TRPA_CHX | | 245 | CHAR(1) |
| TRPALCGX | What was the cost for alcoholic beverages at grocery stores, convenience stores, or liquor stores, including taxes? | 246 | NUM(8) |
| | S18B/C 8d | | |
| TRPA_CGX | | 254 | CHAR(1) |
| TRPSRPTX | Amount paid to rent sports equipment | 255 | NUM(6) |
| | BLS derived | | |
| TRPS_RTX | | 261 | CHAR(1) |

| | | | |
|----------|--|-----|---------|
| TRSPORTX | Amount paid in fees to play sports or exercise BLS derived | 262 | NUM(6) |
| TRSP_RTX | | 268 | CHAR(1) |
| TRPETRTX | Amount spent for entertainment or admissions BLS derived | 269 | NUM(6) |
| TRPE_RTX | | 275 | CHAR(1) |
| TRMISCX | How much were expenses for souvenirs, passports, tourist booklets, and so on? S18B/C 12b | 276 | NUM(6) |
| TRMISCX_ | | 282 | CHAR(1) |
| FOODOUTS | Did the trip expenses include anything for food and beverages for anyone outside your CU? CODED 1 Yes 2 No S18B/C 13b | 283 | CHAR(1) |
| FOOD_UTS | | 284 | CHAR(1) |
| LODGOUTS | Did the trip expenses include anything for lodging for anyone outside your CU? CODED 1 Yes 2 No S18B/C 13b | 285 | CHAR(1) |
| LODG_UTS | | 286 | CHAR(1) |
| TRANOUTS | Did the trip expenses include anything for transportation for anyone outside your CU? CODED 1 Yes 2 No S18B/C 13b | 287 | CHAR(1) |
| TRAN_UTS | | 288 | CHAR(1) |

| | | | |
|----------|--|-----|---------|
| ELSEOUTS | Did the trip expenses include anything for other expenses for anyone outside your CU? CODED 1 Yes 2 No S18B/C 13b | 289 | CHAR(1) |
| ELSE_UTS | | 290 | CHAR(1) |
| TRPGFTCX | How much of the total expenses for this trip were for persons outside your CU? S18B/C 13c | 291 | NUM(6) |
| TRPG_TCX | | 297 | CHAR(1) |
| QTRFLAX | Cost of meals, snacks, or drinks at restaurants, bars, or fast food places, excluding alcoholic beverages Census derived | 298 | NUM(8) |
| QTRFLAX_ | | 306 | CHAR(1) |
| QTRGLAX | Cost of food or beverages at grocery stores, convenience stores, or liquor stores, excluding alcoholic beverages Census derived | 307 | NUM(8) |
| QTRGLAX_ | | 315 | CHAR(1) |

nn. SECTION 18 TRIPS AND VACATIONS

PART D 100% Reimbursed Trips (TRD)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|--|-----------------------|---------------|
| NUMYUPD | Number of trips ENTIRELY paid for by NON-CU members S18D 1 | 21 | NUM(2) |
| NUMYUPD_ | | 23 | CHAR(1) |
| TOTYUPDX | What was the total amount of expenses on this (these trips) that will not be covered by a business, employer, or other non-CU member? S18D 2c | 24 | NUM(8) |
| TOTY_PDX | | 32 | CHAR(1) |

| | | | |
|----------|---------------------------------------|----|---------|
| TOTYUPDY | Type of expense paid by CU CODED | 33 | CHAR(3) |
| | 100 Meals at restaurant minus alcohol | | |
| | 110 Alcohol | | |
| | 120 Gasoline and oil | | |
| | 130 Lodging | | |
| | 140 Highway tolls | | |
| | 150 Plane fare | | |
| | 160 Train fare | | |
| | 170 Bus fare | | |
| | 180 Ship fare | | |
| | 190 Taxi fare | | |
| | 200 Miscellaneous expenses | | |
| | 210 Entertainment expenses | | |
| | 220 Sports expenses | | |

BLS derived

| | | | |
|----------|--|----|---------|
| TOTY_PDY | | 36 | CHAR(1) |
|----------|--|----|---------|

oo. SECTION 18 TRIPS AND VACATIONS

PART E Trip Expenses for Non-CU Members (TRE)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|----------|--|----------------|---------|
| NUMNONCU | Since the 1st of (<i>month, three months ago</i>), how many trips have you (has your CU) paid in full or in part for any non-CU members? | 21 | NUM(2) |
| | S18E 1b | | |
| NUMN_NCU | | 23 | CHAR(1) |
| TRNONCUX | What was the total amount that you (your CU) paid for that trip (those trips)? | 24 | NUM(8) |
| | BLS derived | | |
| TRNO_CUX | | 32 | CHAR(1) |

| | | | |
|----------|--|----|---------|
| TRNONCUY | Type of expense paid for non-CU members CODED | 33 | CHAR(3) |
| | 100 Meals at restaurant minus alcohol | | |
| | 110 Alcohol | | |
| | 120 Gasoline and oil | | |
| | 130 Lodging | | |
| | 140 Highway tolls | | |
| | 150 Plane fare | | |
| | 160 Train fare | | |
| | 170 Bus fare | | |
| | 180 Ship fare | | |
| | 190 Taxi fare | | |
| | 200 Miscellaneous expenses | | |
| | 210 Entertainment expenses | | |
| | 220 Sports expenses | | |

BLS derived

| | | | |
|----------|--|----|---------|
| TRNO_CUY | | 36 | CHAR(1) |
|----------|--|----|---------|

pp. **SECTION 18 TRIPS AND VACATIONS**

PART F Local Overnight Stays (TRF)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|----------|---|----------------|---------|
| NUMLOC | How many nights did you (or any members of your CU) spend away from home on this stay? | 21 | NUM(2) |
| | S18F 2 | | |
| NUMLOC_ | | 23 | CHAR(1) |
| LOCLODGX | Cost for hotels, motels, cottages, trailer camps, or other lodging, including taxes and tips | 24 | NUM(8) |
| | BLS derived | | |
| LOCL_DGX | | 32 | CHAR(1) |
| ALCMEALX | Cost for alcoholic beverages at restaurants, bars, or fast food places, including taxes and tips | 33 | NUM(8) |
| | BLS derived | | |
| ALCM_ALX | | 41 | CHAR(1) |
| ALCGROCX | What was the cost for alcoholic beverages at grocery stores, convenience stores, or liquor stores, including taxes? | 42 | NUM(8) |

| | | | |
|----------|--|----|---------|
| | S18F 6d | | |
| ALCG_OCX | | 50 | CHAR(1) |
| LOCADMSX | Amount paid for entertainment or admissions | 51 | NUM(8) |
| | BLS derived | | |
| LOCA_MSX | | 59 | CHAR(1) |
| FOODLCDL | Did the package deal include anything for food and beverages? CODED 1 Yes 2 No | 60 | CHAR(1) |
| | S18F 3b | | |
| FOOD_CDL | | 61 | CHAR(1) |
| LODGLCDL | Did the package deal include anything for lodging? CODED 1 Yes 2 No | 62 | CHAR(1) |
| | S18F 3b | | |
| LODG_CDL | | 63 | CHAR(1) |
| ENTRLCDL | Did the package deal include anything for entertainment? CODED 1 Yes 2 No | 64 | CHAR(1) |
| | S18F 3b | | |
| ENTR_CDL | | 65 | CHAR(1) |
| ELSELCDL | Did the package deal include anything for anything else? CODED 1 Yes 2 No | 66 | CHAR(1) |
| | S18F 3b | | |
| ELSE_CDL | | 67 | CHAR(1) |
| QLCMLAX | Cost of meals, snacks, or drinks at restaurants, bars, or fast food places, excluding alcoholic beverages | 68 | NUM(8) |
| | Census derived | | |
| QLCMLAX_ | | 76 | CHAR(1) |
| QLCGLAX | Cost of food or beverages at grocery stores, convenience stores, or liquor stores, excluding alcoholic beverages | 77 | NUM(8) |

Census derived

QLCGLAX_

85 CHAR(1)

qq. SECTION 19 MISCELLANEOUS EXPENSES

Part A Miscellaneous Expenses (MIS)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|----------|---|----------------|---------|
| MISCCODE | Item code CODED | 21 | CHAR(3) |
| | 100 Funerals, burials or cremation | | |
| | 110 Purchase or upkeep of cemetery lots or vaults | | |
| | 120 Combined funeral and cemetery expenses (100, 110) | | |
| | 130 Catered affairs | | |
| | 140 Fresh flowers or potted plants | | |
| | 150 Legal fees (excluding real estate closing costs) | | |
| | 160 Accounting fees | | |
| | 170 Gardening or lawn care services | | |
| | 180 Housekeeping services | | |
| | 190 Babysitting or other child care in your own home | | |
| | 200 Care for invalids, convalescents, handicapped or elderly persons in the home | | |
| | 210 Other home services and small repair jobs around the house, not previously reported | | |
| | 220 Babysitting or other child care in someone else's home | | |
| | 230 Moving, storage and freight express | | |
| | 240 Purchases of pets, pet supplies and medicine for pets | | |
| | 250 Pet services | | |
| | 260 Veterinarian expenses for pets | | |
| | 290 TV computer games and computer game software | | |
| | 300 Hand held computer games and computer board games | | |
| | 330 Toys and games | | |
| | 340 Hobbies | | |
| | 350 Adult day care centers | | |
| | 360 Professional photography fees | | |
| | 370 Home security system service fees | | |
| | 380 Occupational expenses | | |
| | 390 Lotteries and games of chance | | |
| MISC_ODE | S 19A col. c | 24 | CHAR(1) |

| | | | |
|----------|---|----|---------|
| MISCMO | In what month did you have this expense? CODED 01-12 January-December 13 Continuous expense | 25 | CHAR(2) |
| | S 19A col. d | | |
| MISCMO_ | | 27 | CHAR(1) |
| MISCGFTC | Was this expense for your CU or someone outside of your CU? CODED 1 For CU 2 For someone outside your CU | 28 | CHAR(1) |
| | S 19A col. e | | |
| MISC_FTC | | 29 | CHAR(1) |
| MISCEXPX | What was the total amount of the expense? | 30 | NUM(6) |
| | S 19A col. f | | |
| MISC_XPX | | 36 | CHAR(1) |

rr. **SECTION 19 MISCELLANEOUS EXPENSES**

Part B Contributions (CNT)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START | POSITION | FORMAT |
|-----------------|-------------------------|--------------|-----------------|---------------|
|-----------------|-------------------------|--------------|-----------------|---------------|

| | | | |
|----------|---|----|---------|
| CONTCODE | Contributions Item code CODED 100 College student living away from home 110 Child support 120 Alimony 130 Educational institutions 140 Political organizations 150 Religious organizations 160 Charities and all other organizations 170 Any and all other persons not in your CU 180 Given stocks, bonds, or mutual funds to persons or organizations outside your CU | 21 | CHAR(3) |
| | S 19B 1c | | |
| CONT_ODE | | 24 | CHAR(1) |
| CONTMO | CODED 01-12 month of payment/contribution 13 continuing expense | 25 | CHAR(2) |
| | S 19B 1d | | |
| CONTMO_ | | 27 | CHAR(1) |
| CONTEXPX | Amount of contribution | 28 | NUM(8) |
| | S 19B 1e | | |
| CONT_XPX | | 36 | CHAR(1) |

ss. SECTION 20 EXPENSE PATTERNS FOR FOOD, BEVERAGES, AND OTHER SELECTED ITEMS

PART A Food and Beverages (XPA)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|----------|---|----------------|---------|
| JMKPURQV | Quarterly expenditure at the grocery store or supermarket | 21 | NUM(8) |
| | BLS derived | | |
| JMKP_RQV | | 29 | CHAR(1) |
| JNONFDQV | Quarterly expenditure for nonfood items, such as paper products, detergents, home cleaning supplies, pet foods, and alcoholic beverages at the grocery store or supermarket | 30 | NUM(8) |
| | BLS derived | | |

| | | | |
|----------|--|-----|---------|
| JNON_DQV | | 38 | CHAR(1) |
| JOTHSTQV | Quarterly expenditure for food or nonalcoholic beverages from places other than grocery stores, such as home delivery, specialty stores, bakeries, convenience stores, dairy stores, vegetable stands, or farmers' markets | 39 | NUM(8) |
| | BLS derived | | |
| JOTH_TQV | | 47 | CHAR(1) |
| JBRWINQV | Quarterly expenditure for beer and wine to be served at home | 48 | NUM(8) |
| | BLS derived | | |
| JBRW_NQV | | 56 | CHAR(1) |
| JOTHALQV | Quarterly expenditure for other alcoholic beverages to be served at home | 57 | NUM(8) |
| | BLS derived | | |
| JOTH_LQV | | 65 | CHAR(1) |
| JDINEOQV | Quarterly expenditure for dinners, other meals, or snacks in restaurants, cafeterias, cafes, drive-ins, or other such places | 66 | NUM(8) |
| | BLS derived | | |
| JDIN_OQV | | 74 | CHAR(1) |
| JALOUTQV | Quarterly expenditure for any alcoholic beverages in restaurants, taverns, or cocktail lounges | 75 | NUM(8) |
| | BLS derived | | |
| JALO_TQV | | 83 | CHAR(1) |
| JBRDQV | Quarterly expenditure for board not received in a boarding house | 84 | NUM(8) |
| | BLS derived | | |
| JBRDQV_ | | 92 | CHAR(1) |
| JMLPAYQV | Quarterly value of any free meals at work as part of your pay | 93 | NUM(8) |
| | BLS derived | | |
| JMLP_YQV | | 101 | CHAR(1) |
| JMEALPYA | Annual value of any free meals at work as part of your pay (JMLPAYQV * 4) | 102 | NUM(8) |
| | BLS derived | | |
| JMEA_PYA | | 110 | CHAR(1) |

| | | | |
|----------|---|-----|---------|
| JSCHMLQV | Quarterly expenditure for any meals at school or in a preschool program for preschool or school age children (summed across all members) | 111 | NUM(8) |
| | BLS derived | | |
| JSCH_LQV | | 119 | CHAR(1) |
| JMKGRCQV | Quarterly expenditure for food and nonalcoholic beverages at the grocery store or supermarket (JMKPURQV - JNONFDQV) | 120 | NUM(8) |
| | BLS derived | | |
| JMKG_CQV | | 128 | CHAR(1) |
| FREEFOOD | Have you (or any members of your CU) received any free food, beverages, or meals through public or private welfare agencies, including religious organizations? (Exclude free meals in school or preschool programs.) | 129 | CHAR(1) |
| | CODED | | |
| | 1 Yes | | |
| | 2 No | | |
| | S 20A 7 | | |
| FREE_OOD | | 130 | CHAR(1) |

tt. SECTION 20 EXPENSE PATTERNS FOR FOOD, BEVERAGES, AND OTHER SELECTED ITEMS

PART B Selected Services and Goods (XPB)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|--|-----------------------|---------------|
| OTHLNDRX | What was the cost for coin-operated laundry or dry cleaning machines for items other than clothes? | 27 | NUM(5) |
| | S 20B 1d | | |
| OTHL_DRX | | 32 | CHAR(1) |
| OTHDCLNX | What was the cost for items other than clothes sent to the dry cleaners or laundry? | 33 | NUM(4) |
| | S 20B 2d | | |
| OTHD_LNX | | 37 | CHAR(1) |

| | | | |
|----------|--|-----|---------|
| SAFDPSTX | What was the total rental expense for a safe deposit box in a bank or a similar financial institution since the 1st of (<i>month, 3 months ago</i>)? S 20B 5b | 38 | NUM(3) |
| SAFD_STX | | 41 | CHAR(1) |
| TXLIMX | Since the 1st of (<i>month, 3 months ago</i>), what was the total expense for taxis or limousine service for non-business purposes, except those used while on a trip? S 20B 7b | 42 | NUM(4) |
| TXLIMX_ | | 46 | CHAR(1) |
| JLDRYNET | Cost for coin-operated laundry or dry cleaning machines for clothing items BLS derived | 61 | NUM(8) |
| JLDR_NET | | 69 | CHAR(1) |
| JDRYCNET | Cost for services at the dry cleaners or laundry for clothing items BLS derived | 70 | NUM(8) |
| JDRY_NET | | 78 | CHAR(1) |
| JCIGARQV | Quarterly expenditure for cigarettes BLS derived | 79 | NUM(8) |
| JCIG_RQV | | 87 | CHAR(1) |
| JOTBACQV | Quarterly expenditure for cigars, pipe tobacco, or other tobaccos, including chewing tobacco BLS derived | 88 | NUM(8) |
| JOTB_CQV | | 96 | CHAR(1) |
| JBNKSCQV | Quarterly charges for checking accounts or other banking services BLS derived | 115 | NUM(8) |
| JBNK_CQV | | 123 | CHAR(1) |
| JTRANWQV | Usual quarterly cost of mass transit to go to work BLS derived | 124 | NUM(8) |
| JTRA_WQV | | 132 | CHAR(1) |
| JTRANSQV | Usual quarterly cost of mass transit to go to school | 133 | NUM(8) |

| | | | |
|----------|---|-----|---------|
| | BLS derived | | |
| JTRA_SQV | | 141 | CHAR(1) |
| JTRANOQV | Usual quarterly cost of mass transit to go to other places | 142 | NUM(8) |
| | BLS derived | | |
| JTRA_OQV | | 150 | CHAR(1) |
| HAIRX | Quarterly expense for haircuts, styling, and other related services | 160 | NUM(6) |
| | S 20B 4 | | |
| HAIRX_ | | 166 | CHAR(1) |

uu. **SECTION 21 CREDIT LIABILITY**

PART A.1 Credit Balances - Second Quarter Only (FN2)
(Data collected in second interview and carried forward)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|--|-----------------------|---------------|
| CREDITR1 | Credit source item code CODED 100 Revolving credit accounts, including store, gasoline, and general purpose credit cards, such as Sears, Amoco, Visa, MasterCard, etc. 200 Stores for installment credit accounts 300 Banks and savings and loan companies 400 Credit unions 500 Finance companies 600 Insurance companies 700 Doctors, dentists, hospitals, or other medical practitioners for expenses not covered by insurance 800 Other credit sources | 21 | CHAR(3) |
| | S21A.1 col. b | | |
| CRED_TR1 | | 24 | CHAR(1) |
| CREDITX1 | On the 1st of (<i>the current month</i>), how much was owed to (<i>credit source</i>)? (Do not include mortgage, home equity loans, vehicle loans, or business related loans) | 25 | NUM(8) |
| | S21A.1 col. d | | |
| CRED_TX1 | | 33 | CHAR(1) |

vv. **SECTION 21 CREDIT LIABILITY**

PART A.2 Credit Balances - Annual Supplement - Fifth Quarter (FNA)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|-----------------|---|-----------------------|---------------|
| CREDITR5 | Credit source item code CODED 100 Revolving credit accounts, including store, gasoline, and general purpose credit cards, such as Sears, Amoco, Visa, MasterCard, etc. 200 Stores for installment credit accounts 300 Banks and savings and loan companies 400 Credit unions 500 Finance companies 600 Insurance companies 700 Doctors, dentists, hospitals, or other medical practitioners for expenses not covered by insurance 800 Other credit sources | 21 | CHAR(3) |
| | S21A.2S col. b | | |
| CRED_TR5 | | 24 | CHAR(1) |
| CREDITX5 | On the 1st of (<i>the current month</i>), how much was owed to (<i>credit source</i>)? (Do not include mortgage, home equity loans, vehicle loans, or business related loans?) | 25 | NUM(8) |
| | S21A.2S col. d | | |
| CRED_TX5 | | 33 | CHAR(1) |
| OWEMONEY | What was the total amount owed on the 1st of (<i>current month, one year ago</i>)? | 34 | NUM(8) |
| | S21A.2S col. e | | |
| OWEM_NEY | | 42 | CHAR(1) |

ww. **SECTION 21 CREDIT LIABILITY**

PART B Finance Charges - Annual Supplement - Fifth Quarter (FNB)

Positions 1-20 contain the variables QYEAR, NEWID, SEQNO, ALCNO and REC_ORIG that are common to all sections of EXPN. Descriptions of these variables can be found in Section 1.

| VARIABLE | ITEM DESCRIPTION | START POSITION | FORMAT |
|---|---|-----------------------|---------------|
| Finance charges, interest charges, and late fees reported in this section do not apply to mortgages, home equity loans, or vehicle loans. | | | |
| CRDCARDX | During the past 12 months, how much was paid for finance, interest and late charges to revolving credit accounts including store, gasoline, and general purpose credit cards, such as Sears, Amoco, Visa, MasterCard, etc.? (Exclude yearly fees) | 21 | NUM(6) |
| | S21B.S a | | |
| CRDC_RDX | | 27 | CHAR(1) |
| INSTALLX | During the past 12 months, how much was paid for finance, interest and late charges to stores for installment credit accounts? | 28 | NUM(6) |
| | S21B.S b | | |
| INST_LLX | | 34 | CHAR(1) |
| BANKX | During the past 12 months, how much was paid for finance, interest and late charges to banks and savings and loans? | 35 | NUM(6) |
| | S21B.S c | | |
| BANKX_ | | 41 | CHAR(1) |
| CDUNIONX | During the past 12 months, how much was paid for finance, interest and late charges to credit unions? | 42 | NUM(6) |
| | S21B.S d | | |
| CDUN_ONX | | 48 | CHAR(1) |
| FININT | During the past 12 months, how much was paid for finance, interest and late charges to finance companies? | 49 | NUM(6) |
| | S21B.S e | | |
| FININT_ | | 55 | CHAR(1) |
| INSUREX | During the past 12 months, how much was paid for finance, interest and late charges to insurance companies? | 56 | NUM(6) |
| | S21B.S f | | |

| | | | |
|----------|--|----|---------|
| INSUREX_ | | 62 | CHAR(1) |
| MEDICALX | During the past 12 months, how much was paid for finance, interest and late charges to doctors, dentists, hospitals, or other medical practitioners for expenses not covered by insurance? | 63 | NUM(6) |
| | S21B.S g | | |
| MEDI_ALX | | 69 | CHAR(1) |
| PDOTHERX | During the past 12 months, how much was paid for finance, interest and late charges to other credit sources? | 70 | NUM(6) |
| | S21B.S h | | |
| PDOT_ERX | | 76 | CHAR(1) |

6. PROCESSING FILES

a. Istub file

X:\Programs\lstub.txt

The lstub file shows the aggregation scheme used in the published consumer expenditure tables. It is formatted as follows:

| DESCRIPTION | START POSITION | FORMAT |
|--|----------------|----------|
| Type: represents whether information in this line contains aggregation data or not | 1 | CHAR(1) |
| Level: aggregation level (lowest number is highest level of aggregation) | 4 | CHAR(1) |
| Title: title of the line item | 7 | CHAR(60) |
| UCC: UCC number in the MTAB or ITAB file | 70 | CHAR(6) |
| Survey: Indicates survey source (I = interview, G = Aggregated item) | 80 | CHAR(1) |
| Group: Indicates if the item is and expenditure, income, or asset | 86 | CHAR(7) |

Note: this file is an internal bls file used for processing expenditures. It has other information that may be ignored by users of the public use data.

b. UCC file

X:\INTRVW02\UCCI02.TXT

The UCC file contains UCCs and their abbreviated titles, identifying the expenditure, income, or demographic item represented by each UCC. It is formatted as follows:

| DESCRIPTION | START POSITION | FORMAT |
|-------------|-------------------|----------|
| UCC | 1 | CHAR(6) |
| UCC title | 8 | CHAR(50) |

(See Section XIII.A. EXPENDITURE UCCS ON MTAB FILE and XIII.B. INCOME AND RELATED UCCS ON ITAB FILE for a list of UCCs and their full titles by file—expenditure (MTAB) or income (ITAB).)

c. VEHicle file

X:\INTRVW02\VEHI02.TXT

The VEH file contains vehicle make and model codes created by the Bureau of the Census. These codes can be found under the variables MODEL in EXPN Section 10, Part B (Rented and Leased Vehicles – Detailed Questions for Leased Vehicles) and MKMDLY in EXPN Section 11, Part B (Owned Vehicles - Detailed Questions). The file is formatted as follows:

| DESCRIPTION | START POSITION | FORMAT |
|-----------------|-------------------|----------|
| Make/model code | 1 | CHAR(4) |
| Make and model | 6 | CHAR(69) |

d. Sample program file

X:\Programs\SAS Intrvw (mlf) Mean and SE.sas
 X:\Programs\ASCII Intrvw (mlf) Mean and SE.sas

The SAMPLI02 file contains the computer program used in Section VII.A. SAMPLE PROGRAM of the documentation. This file has been created to provide programming assistance.

IV. TOPCODING AND OTHER NONDISCLOSURE REQUIREMENTS

Sensitive CU data are changed so that users will not be able to identify CUs who participated in the survey. Topcoding refers to the replacement of data in cases where the value of the original data exceeds prescribed critical values. Critical values for each variable containing sensitive data are calculated in accordance with Census Disclosure Review Board guidelines. Each observation that falls outside the critical value is replaced with a topcoded value that represents the mean of the subset of all outlying observations. All five quarters of data in the CE microdata release are used when calculating the critical value and topcode amounts. If an observation is topcoded, the flag variable assigned to that observation is set to 'T'.

Since the critical value and mean of the set of values outside the critical value may differ with each annual (five-quarter) release, the topcode values may change annually and be applied at a different starting point. By topcoding values in this manner, the first moment will be preserved for each five-quarter data release when using the total sample. This, however, will not be the case when means are estimated by characteristic, because topcode values are not calculated by characteristic.

A. CU CHARACTERISTICS AND INCOME FILE (FMLY)

The following FMLY file variables are subject to topcoding.

| | |
|----------|--|
| AGE_REF | Age of reference person |
| AGE2 | Age of spouse |
| ALIOTHX | Amount received from other regular contributions including alimony |
| BSINVSTX | Amount of investment in own farm or business |
| CHDLMPX | Amount received from lump sum child support payment |
| CHDOTHX | Amount received from other child support payments |
| CKBKACTX | Amount in checking, brokerage and other similar accounts |
| COMPBNDX | Difference in amount held in U.S. Savings bonds |
| COMPCKGX | Difference in amount held in checking accounts |
| COMPOWDX | Difference in amount of money owed to CU |
| COMPSAVX | Difference in amount held in savings accounts |
| COMPSECX | Difference in estimated market value of all stocks, bonds, or mutual funds including broker fees |
| FEDRFNDX | Amount of refund received from Federal income tax |
| FEDTAXX | Amount of Federal income tax paid in addition to that withheld |
| FININCX | Amount received from regular income from dividends, royalties, estates or trusts |
| INCLOSSA | Amount of net income or loss received from roomers or boarders |
| INCLOSSB | Amount of net income or loss received from other rental units |
| INSRFNDX | Amount of refund received from insurance policies |
| INTEARNX | Amount received from interest on savings accounts or bonds |
| LUMPSUMX | Amount received from lump sum receipts |
| MISCTAXX | Amount of other taxes paid but not reported elsewhere |
| MONYOWDX | Amount of money owed to CU by persons outside CU |
| OCCEXPX | Amount of occupational expenses |
| OTHRFNDX | Amount of refund received from other sources |
| OTHRINCX | Amount received from other money income |
| PENSIONX | Amount received from pensions or annuities |
| PTAXRFDX | Amount of refund received from property taxes |
| PURSSECX | Purchase price of stocks, bonds, or mutual funds |
| RENTEQVX | Rental equivalence of owned home |
| SALEINCX | Amount received from sale of household furnishings, equipment |
| SAVACCTX | Amount in savings accounts |
| SECESTX | Estimated market value of all stocks, bonds, mutual funds |
| SELLSECX | Net amount received from sales of stocks, bonds, mutual funds |

| | |
|----------|--|
| SETLINSX | Amount received from settlement on surrender of any insurance policies |
| SLOCTAXX | Amount of state and local income tax paid in addition to that withheld |
| SLRFUNDX | Amount of refund received from state and local income taxes |
| SSOVERPX | Amount of refund received from overpayment on Social Security |
| TAXPROPX | Amount of personal property taxes paid |
| USBNDX | Amount in U.S. Savings bonds |
| WDBSASTX | Amount of assets withdrawn from own farm or business |
| WDBSGDSX | Amount of goods or services withdrawn from own farm or business |

The critical values and topcode values associated with the above variables follow.

| <u>Variable</u> | <u>Critical value +</u> | <u>Critical value -</u> | <u>Topcode value +</u> | <u>Topcode value -</u> | <u>Condition</u> |
|-----------------|-------------------------|-------------------------|------------------------|------------------------|------------------|
| AGE_REF | 80 | - | 85 | - | - |
| AGE2 | 80 | - | 84 | - | - |
| ALIOTHX | 24,000 | - | 159,680 | - | - |
| BSINVSTX | 200,000 | - | 518,333 | - | - |
| CHDLMPX | 11,500 | - | 19,133 | - | - |
| CHDOTHX | 14,400 | - | 20,666 | - | - |
| CKBKACTX | 28,365 | - | 155,907 | - | - |
| COMPBNDX | 15,000 | -4,000 | 50,000 | -4,702 | - |
| COMPCKGX | 25,000 | -40,000 | 69,036 | -163,673 | - |
| COMPOWDX | 35,000 | -47,000 | 75,263 | -125,000 | - |
| COMPSAVX | 62,000 | -60,000 | 112,708 | -165,298 | - |
| COMPSECX | 200,000 | -269,108 | 511,831 | -689,810 | - |
| FEDRFNDX | 6,000 | - | 10,693 | - | - |
| FEDTAXX | 25,000 | - | 78,107 | - | - |
| FININCX | 50,000 | - | 125,193 | - | - |
| INCLOSSA | 31,800 | -12,430 | 41,933 | -17,280 | - |
| INCLOSSB | 44,400 | -25,277 | 176,667 | -54,013 | - |
| INSRFNDX | 1,700 | - | 11,703 | - | - |
| INTEARNX | 35,000 | - | 68,521 | - | - |
| LUMPSUMX | 100,000 | - | 379,083 | - | - |
| MISCTAXX | 5,300 | - | 8,949 | - | - |
| MONYOWDX | 114,000 | - | 214,800 | - | - |
| OCCEXPX | - | - | - | - | - |
| OTHRFNDX | 1,600 | - | 8,562 | - | - |
| OTHRINCX | 25,000 | - | 130,071 | - | - |
| PENSIONX | 50,000 | - | 72,918 | - | - |
| PTAXRFDX | 1,800 | - | 3,205 | - | - |
| PURSSECX | 150,000 | - | 424,961 | - | - |
| RENTEQVX | 2,900 | - | 3,912 | - | OWNYI = '100' |
| SALEINCX | 5,200 | - | 21,138 | - | - |
| SAVACCTX | 100,000 | - | 220,668 | - | - |
| SECESTX | 800,000 | - | 1,743,634 | - | - |
| SELLSECX | 150,000 | - | 387,124 | - | - |
| SETLINSX | 44,000 | - | 133,500 | - | - |
| SLOCTAXX | 6,000 | - | 18,953 | - | - |
| SLRFUNDX | 1,800 | - | 3,049 | - | - |
| SSOVERPX | 4,800 | - | 9,900 | - | - |
| TAXPROPX | 1,800 | - | 2,991 | - | - |
| USBNDX | 40,000 | - | 70,625 | - | - |
| WDBSASTX | 100,000 | - | 390,000 | - | - |
| WDBSGDSX | 20,000 | - | 43,333 | - | - |

Some income variables that are subject to topcoding are constructed by summing up the values of “lower level” MEMB or FMLY file component variables. These variables are not topcoded by the conventional method of replacement with a topcode value. Instead the variables’ components are summed normally and the variables are flagged as topcoded if one of their component variables is topcoded. Following are the income variables that are calculated using values of their component variables. (See the descriptions of each variable in Sections III.F.1.e. INCOME - III.F.1.h. RETIREMENT AND PENSION DEDUCTIONS for a list of component variables.)

| | |
|----------|--|
| EARNINCX | Amount of CU income from earnings before taxes |
| FAMTFEDX | Amount of Federal income tax deducted from last pay, annualized for all CU members |
| FFRMINCX | Amount of income or loss received from own farm |
| FGOVRETX | Amount of government retirement deducted from last pay, annualized for all CU members |
| FINCATAX | Amount of CU income after taxes |
| FINCBTAX | Amount of CU income before taxes |
| FINDRETX | Amount of money placed in individual retirement plan |
| FJSSDEDX | Estimated amount of annual Social Security contribution |
| FNONFRMX | Amount of income or loss received from nonfarm business |
| FPRIPENX | Amount of private pension fund deducted from last pay, annualized for all CU members |
| FRRDEDX | Amount of Railroad Retirement deducted from last pay, annualized for all CU members |
| FSALARYX | Amount received from wage and salary income before deductions |
| FSLTAXX | Amount of state and local income taxes deducted from last pay, annualized for all CU members |
| NO_EARNX | Amount of income from sources other than earnings before taxes |
| NONINCMX | Amount of other money receipts excluded from family income |
| TOTTXPDX | Amount of personal taxes paid |

Here are some examples of situations that may occur. The value for the variable FFRMINCX (Family income or loss from farm) is computed as the sum of the values reported for the variable FARMINCX (member income or loss from farm) from the MEMB file. FARMINCX is subject to topcoding beyond the critical value of \$90,000 (-\$50,000). The topcode value for FARMINCX is \$102,667 (-\$76,000). (See Section IV.B. MEMBER CHARACTERISTICS AND INCOME FILE (MEMB)).

| <u>CU</u> | <u>FARMINCX</u> | | <u>FFRMINCX</u> | | <u>FLAGGED AS TOPCODED?</u> |
|-----------|-----------------|-----------------|------------------------|--------------|-----------------------------|
| | | <u>REPORTED</u> | <u>AFTER TOPCODING</u> | <u>VALUE</u> | |
| CU 1: | MEMB1 | \$85,000 | \$85,000 | | |
| | MEMB2 | 85,000 | 85,000 | 170,000 | No |
| CU 2: | MEMB1 | 160,000 | 102,667 | | |
| | MEMB2 | 10,000 | 10,000 | 112,667 | Yes |
| CU 3 | MEMB1 | 95,000 | 102,667 | | |
| | MEMB2 | 50,000 | 50,000 | 152,667 | Yes |
| CU 4 | MEMB1 | 85,000 | 85,000 | | |
| | MEMB2 | -55,000 | -76,000 | 9,000 | Yes |

While CUs 1 and 2 each originally report \$170,000 in FARMINCX, topcoding is done only on the value reported by MEMB1 of CU2. Thus, the value for FFRMINCX for CU2 is lower than for CU1 and is flagged as topcoded while CU1 is not. By using the mean of the subset of observations that are above (below) the critical value as the topcode amount, values on the public use data can be either below or above the actual reported value. Note that while CU2 has a topcoded value below the reported value, CU3’s topcoded FFRMINCX value (\$152,667) is higher than the amount that it reported (\$145,000). The

case of CU4 demonstrates that the value for FFRMINCX can be lower than other topcoding situations, yet still be flagged as topcoded. This is due to the presence of a negative value (loss) for FARMINCX reported by MEMB2. The reverse can also occur.

The value of the variable, STATE, which identifies the state of residence, must be suppressed for some observations to meet the Census Disclosure Review Board's criterion that the smallest geographically identifiable area have a population of at least 100,000. STATE data were evaluated vis-à-vis the POPSIZE, REGION, and BLS_URBN variables, which show the population size of the geographic area that is sampled, the four Census regions, and urban/rural status respectively. Some STATE codes were suppressed because, in combination with these variables, they could be used to identify areas of 100,000 or less. On approximately 17 percent of the records on the FMLY files the STATE variable is blank. The STATE flag (STATE_) is given a value of 'T' if STATE is suppressed.

A small proportion of STATE codes are replaced with codes of states other than the state where the CU resides. By re-coding in this manner, suppression of POPSIZE and REGION may be avoided. (In past releases selected observations of POPSIZE and REGION required suppression.) If a CU's state of residence is re-coded with another state's code, the flag variable (STATE_) of the re-coded observation is assigned an 'R'. The flag variable is also assigned an 'R' for either all or a portion of other observations from that state. In total, approximately 4% of observations of STATE_ are assigned an 'R'.

| | | | |
|--------|----------------------|--------|----------------|
| 01 | Alabama | *28 | Mississippi |
| 02 | Alaska | **29 | Missouri |
| RR04 | Arizona | 31 | Nebraska |
| *05 | Arkansas | R32 | Nevada |
| **06 | California | R33 | New Hampshire |
| 08 | Colorado | 34 | New Jersey |
| 09 | Connecticut | *35 | New Mexico |
| 10 | Delaware | RR**36 | New York |
| R11 | District of Columbia | **37 | North Carolina |
| **12 | Florida | RR39 | Ohio |
| **13 | Georgia | **40 | Oklahoma |
| 15 | Hawaii | **41 | Oregon |
| 16 | Idaho | 42 | Pennsylvania |
| **17 | Illinois | 45 | South Carolina |
| RR**18 | Indiana | *46 | South Dakota |
| *19 | Iowa | **47 | Tennessee |
| **20 | Kansas | 48 | Texas |
| 21 | Kentucky | 49 | Utah |
| 22 | Louisiana | 50 | Vermont |
| R*23 | Maine | **51 | Virginia |
| 24 | Maryland | **53 | Washington |
| 25 | Massachusetts | R54 | West Virginia |
| **26 | Michigan | 55 | Wisconsin |
| **27 | Minnesota | | |

* indicates that the STATE code has been suppressed for all sampled CUs in that state (STATE_ = 'T' for all observations).

** indicates that the STATE code has been suppressed for some sampled CUs in that state (STATE_ = 'T' for some observations).

R indicates that either all observations from this state have been re-coded or all strata¹ of observations from this state include "re-codes" from other states.

RR indicates that either some observations from this state have been re-coded or at least one stratum¹ of observations from this state includes "re-codes" from other states.

R* indicates that the STATE code has been suppressed for some sampled CUs in that state and, either STATE has been re-coded or the state includes "re-codes" from other states in all strata¹.

RR** indicates that the STATE code has been suppressed for some sampled CUs in that state and, either STATE has been re-coded or the state includes "re-codes" from other states in at least one stratum¹.

¹ A STATE stratum is a unique POPSIZE and BLS_URBN combination.

States not listed are not in the CE sample.

B. MEMBER CHARACTERISTICS AND INCOME FILE (MEMB)

The following MEMB file variables are subject to topcoding.

| | |
|----------|---|
| AGE | Age of member |
| AMTFED | Amount of Federal income tax deducted from last pay |
| ANFEDTX | Annual amount of Federal income tax deducted from pay |
| ANGOVRTX | Annual amount of government retirement deducted from pay |
| ANPRVPNX | Annual amount of private pension fund deducted from pay |
| ANRRDEDX | Annual amount of Railroad Retirement deducted from pay |
| ANSLTX | Annual amount of state and local income taxes deducted from pay |
| FARMINCX | Amount of income or loss received from own farm |
| GOVRETX | Amount of government retirement deducted from last pay |
| GROSPAYX | Amount of last gross pay |
| INDRETX | Amount of money placed in individual retirement plan |
| JSSDEDX | Estimated annual Social Security contribution |
| NONFARMX | Amount of income or loss received from own nonfarm business |
| PRIVPENX | Amount of private pension fund deducted from last pay |
| RRRDEDX | Amount of Railroad Retirement deducted from last pay |
| SALARYX | Amount received from wage and salary income before deductions |
| SLFEMPSS | Amount of self-employment Social Security contribution |
| SLTAXX | Amount of state and local income taxes deducted last pay |

The critical values and topcode values associated with the above variables follow.

| <u>Variable</u> | <u>Critical value +</u> | <u>Critical value -</u> | <u>Topcode value +</u> | <u>Topcode value -</u> |
|-----------------|-------------------------|-------------------------|------------------------|------------------------|
| AGE | 80 | - | 85 | - |
| AMTFED | 1,000 | - | 3,511 | - |
| ANFEDTX | 21,739 | - | 36,482 | - |
| ANGOVRTX | 7,000 | - | 7,803 | - |
| ANPRVPNX | 12,500 | - | 19,439 | - |
| ANRRDEDX | 5,600 | - | 7,000 | - |
| ANSLTX | 7,200 | - | 10,758 | - |
| FARMINCX | 90,000 | -50,000 | 102,667 | -76,000 |
| GOVRETX | 427 | - | 683 | - |
| GROSPAYX | 5,200 | - | 16,027 | - |
| INDRETX | 15,028 | - | 41,212 | - |
| JSSDEDX | 7,279 | - | 9,340 | - |
| NONFARMX | 150,000 | -9,999 | 248,281 | -35,070 |
| PRIVPENX | 600 | - | 2,038 | - |
| RRRDEDX | 340 | - | 426 | - |
| SALARYX | 150,000 | - | 285,403 | - |
| SLFEMPSS | 14,008 | - | 16,163 | - |
| SLTAXX | 314 | - | 836 | - |

Special suppression for MEMB file variables

The five MEMB file variables--AMTFED, GOVRETX, PRIVPENX, RRRDEDX, and SLTAXX--describe deductions from the most recent pay. These variables are used in conjunction with GROSPAYX (amount of last gross pay) and SALARYX (annual wage and salary income) to derive ANFEDTX, ANGOVRTX, ANPRVPNX, ANRRDEDX, and ANSLTX, which represent the estimated annual deductions for each of these income deduction categories. For example, the estimated annual Federal income tax deduction from pay is calculated as

$$(1) \quad \text{ANFEDTX} = (\text{SALARYX} (\text{AMTFED}/\text{GROSPAYX})).$$

Note that SALARYX can be estimated by using the above terms and rearranging such that

$$(2) \quad \text{SALARYX} = (\text{ANFEDTX} (\text{GROSPAYX}/\text{AMTFED})).$$

In the above example, a problem with disclosure may arise when neither ANFEDTX, GROSPAYX, nor AMTFED are topcoded, *but SALARYX is*. In this situation SALARYX can be recalculated to obtain its original value by inserting the non-topcoded values into equation (2) and solving. In order to prevent this, the non-topcoded terms in equation (2) will be suppressed (blanked out) and their associated flags will be assigned a value of 'T'. The following chart describes in detail the specific rules that are applied to prevent the potential disclosure outlined above.

If SALARYX is greater than the critical value but ANFEDTX, GROSPAYX, and AMTFED are not, then the values for ANFEDTX, GROSPAYX, and AMTFED are suppressed and their flag variables are assigned a value of 'T'.

If SALARYX is greater than the critical value but ANGOVRTX, GROSPAYX, and GOVRETX are not, then the values for ANGOVRTX, GROSPAYX, and GOVRETX are suppressed and their flag variables are assigned a value of 'T'.

If SALARYX is greater than the critical value but ANPRVPNX, GROSPAYX, and PRIVPENX are not, then the values for ANPRVPNX, GROSPAYX, and PRIVPENX are suppressed and their flag variables are assigned a value of 'T'.

If SALARYX is greater than the critical value but ANRRDEDX, GROSPAYX, and RRRDEDX are not, then the values for ANRRDEDX, GROSPAYX, and RRRDEDX are suppressed and their flag variables are assigned a value of 'T'.

If SALARYX is greater than the critical value but ANSLTX, GROSPAYX, and SLTAXX are not, then the values for ANSLTX, GROSPAYX, and SLTAXX are suppressed and their flag variables are assigned a value of 'T'.

C. MONTHLY EXPENDITURE FILE (MTAB)

The MTAB variable COST is subject to topcoding for the following UCCs.

| <u>UCC</u> | <u>Description</u> |
|------------|-----------------------------------|
| 210110 | Rent of dwelling |
| 210210 | Lodging away from home |
| 210310 | Housing for someone at school |
| 210901 | Ground rent, owned home |
| 210902 | Ground rent, owned vacation home |
| 550320 | Medical equipment for general use |

| <u>UCC</u> | <u>Description</u> |
|-------------------|---|
| 550330 | Supportive or convalescent medical equipment |
| 560110 | Physicians' services |
| 560210 | Dental services |
| 560310 | Eye care services |
| 560330 | Lab tests and x-rays |
| 560400 | Services by professionals other than physicians |
| 570110 | Hospital room |
| 570210 | Hospital service other than room |
| 570220 | Nursing or convalescent home care |
| 570230 | Other medical care service |
| 570240 | Medical care in retirement community |
| 570901 | Rental of medical equipment |
| 570903 | Rental of supportive, convalescent equipment |
| 600132 | Purchase of boat with motor |
| 600138 | Trade-in allowance for boats with motors |
| 790710 | Purchase other property excluding commons |
| 790810 | Sale price of other property |
| 790910 | Special or lump mortgage payment, other property |
| 790920 | Reduction of mortgage principal, other property |
| 790930 | Original mortgage amount, other property |
| 790940 | Reduction of mortgage principal, home equity loan, other property |
| 790950 | Original loan amount, home equity loan, other property |
| 800721 | Market value of owned home |
| 810101 | Purchase excluding commons, owned home |
| 810102 | Purchase price excluding commons, owned vacation home |
| 820101 | Selling price, owned home |
| 820102 | Selling price, owned vacation home |
| 830101 | Special or lump mortgage payment, owned home |
| 830102 | Special or lump mortgage payment, owned vacation home |
| 830201 | Reduction mortgage principal, owned home |
| 830202 | Reduction mortgage principal, owned vacation home |
| 830203 | Reduction mortgage principal, home equity loan, owned home |
| 830204 | Reduction mortgage principal, home equity loan, owned vacation home |
| 830301 | Original mortgage amount, owned home |
| 830302 | Original mortgage amount, owned vacation home |
| 830303 | Original loan amount, home equity loan, owned home |
| 830304 | Original loan amount, home equity loan, owned vacation home |
| 860600 | Amount boat with motor sold or reimbursed |
| 870701 | Boat with motor, purchase not financed |
| 880120 | Reduction of principal, line of credit, owned home |
| 880220 | Reduction of principal, line of credit, other property |
| 880320 | Reduction of principal, line of credit, owned vacation home |
| 910050 | Rental equivalence of owned home |
| 910100 | Rental equivalence of vacation home |

If the value of COST is greater (less) than the designated critical values for the above UCCs, COST is set to the topcode value and the associated flag variable, COST_, is set to 'T'. The critical values and topcode values (rounded to the nearest dollar) of the variable COST that are associated with the above UCCs follow.

| <u>UCC</u> | <u>Critical value +</u> | <u>Critical value -</u> | <u>Topcode value +</u> | <u>Topcode value -</u> | <u>Mapped from</u> | <u>Condition</u> |
|-------------------|--------------------------------|--------------------------------|-------------------------------|-------------------------------|---------------------------|-------------------------|
| 210110 | 1,500 | - | 2,112 | - | QRT3MCMX | NA |
| 210210 | 1,200 | - | 2,189 | - | LDGCOSTX | NA |
| 210210 | 614 | - | 1,361 | - | TOTYUPDX | TOTYUPDY = '130' |

| <u>UCC</u> | <u>Critical value +</u> | <u>Critical value -</u> | <u>Topcode value +</u> | <u>Topcode value -</u> | <u>Mapped from</u> | <u>Condition</u> |
|------------|-------------------------|-------------------------|------------------------|------------------------|--------------------|---|
| 210210 | 644 | - | 727 | - | TRNONCUX | TRNONCUY = '130' |
| 210310 | 3,499 | - | 4,972 | - | JEDUCNET | EDUC_AY = '310' |
| 210901 | 480 | - | 888 | - | QLR3MCMX | OWNYI = '100' OR OWNYI = '200' |
| 210902 | 933 | - | 2,085 | - | QLR3MCMX | OWNYI = '300' |
| 550320 | 275 | - | 435 | - | MEDPMTX | MEDPCARY = '660' |
| 550320 | - | -157 | - | -893 | MEDRMBX | MEDRCARY = '660' |
| 550330 | 650 | - | 2,409 | - | MEDPMTX | MEDPCARY = '640' |
| 550330 | - | -135 | - | -2,022 | MEDRMBX | MEDRCARY = '640' |
| 560110 | 350 | - | 861 | - | MEDPMTX | MEDPCARY = '420' |
| 560110 | - | -800 | - | -1,511 | MEDRMBX | MEDRCARY = '420' |
| 560210 | 1,200 | - | 2,142 | - | MEDPMTX | MEDPCARY = '200' |
| 560210 | - | -1,266 | - | -2,521 | MEDRMBX | MEDRCARY = '200' |
| 560310 | 325 | - | 1,094 | - | MEDPMTX | MEDPCARY = '110' |
| 560310 | - | -436 | - | -731 | MEDRMBX | MEDRCARY = '110' |
| 560330 | 600 | - | 1,486 | - | MEDPMTX | MEDPCARY = '510' |
| 560330 | - | -368 | - | -819 | MEDRMBX | MEDRCARY = '510' |
| 560400 | 500 | - | 993 | - | MEDPMTX | MEDPCARY = '410' |
| 560400 | - | -600 | - | -750 | MEDRMBX | MEDRCARY = '410' |
| 570110 | 2,684 | - | 4,194 | - | MEDPMTX | MEDPCARY = '310' |
| 570110 | - | -600 | - | -5,198 | MEDRMBX | MEDRCARY = '310' |
| 570210 | 1,500 | - | 2,499 | - | MEDPMTX | MEDPCARY = '320' |
| 570210 | - | -2,400 | - | -6,000 | MEDRMBX | MEDRCARY = '320' |
| 570220 | 3,800 | - | 3,958 | - | MEDPMTX | MEDPCARY = '520' |
| 570230 | 900 | - | 2,034 | - | MEDPMTX | MEDPCARY = '530' |
| 570230 | - | -500 | - | -734 | MEDRMBX | MEDRCARY = '530' |
| 570901 | 245 | - | 1,050 | - | MEDPMTX | MEDPCARY = '650' |
| 570903 | 200 | - | 434 | - | MEDPMTX | MEDPCARY = '630' |
| 570903 | - | -20 | - | -96 | MEDRMBX | MEDRCARY = '630' |
| 790710 | 185,000 | - | 326,800 | - | OWN_PURX | OWNYB = '400' OR OWNYB = '500' |
| 790810 | - | -190,000 | - | -430,000 | DISPX | OWNYD = '400' OR OWNYD = '500' |
| 790910 | - | -900 | - | -1,100 | QLMPSUMX | OWNYI = '400' OR OWNYI = '500' |
| 790920 | - | -1,199 | - | -1,752 | QPRINM1X | (OWNYF = '400' OR OWNYF = '500') AND (LOANTYPE = '1') |
| 790920 | - | -1,209 | - | -1,765 | QPRINM2X | (OWNYF = '400' OR OWNYF = '500') AND (LOANTYPE = '1') |
| 790920 | - | -1,219 | - | -1,641 | QPRINM3X | (OWNYF = '400' OR OWNYF = '500') AND (LOANTYPE = '1') |
| 790930 | 145,000 | - | 251,797 | - | ORGMRTX | (OWNYF = '400' OR OWNYF = '500') AND (LOANTYPE = '1') |
| 790940 | - | -156 | - | -160 | QPRINM1X | (OWNYF = '400' OR OWNYF = '500') AND (LOANTYPE = '2') |
| 790940 | - | -19 | - | -66 | QPRINM2X | (OWNYF = '400' OR OWNYF = '500') AND (LOANTYPE = '2') |
| 790940 | - | -19 | - | -67 | QPRINM3X | (OWNYF = '400' OR OWNYF = '500') AND (LOANTYPE = '2') |
| 800721 | 41,667 | - | 71,440 | - | PROPVALX | OWNYB = '100' OR OWNYB = '200' |
| 810101 | 451,000 | - | 661,100 | - | OWN_PURX | OWNYB = '100' OR OWNYB = '200' |
| 810102 | 200,000 | - | 426,333 | - | OWN_PURX | OWNYB = '300' |
| 820101 | - | -470,500 | - | -586,000 | DISPX | OWNYD = '100' OR OWNYD = '200' |
| 820102 | - | -425,000 | - | -526,250 | DISPX | OWNYD = '300' |
| 830101 | - | -4,200 | - | -27,479 | QLMPSUMX | OWNYI = '100' OR OWNYI = '200' |
| 830102 | - | -2,200 | - | -41,956 | QLMPSUMX | OWNYI = '300' |
| 830201 | - | -798 | - | -1,284 | QPRINM1X | (OWNYF = '100' OR OWNYF = '200') AND (LOANTYPE = '1') |
| 830201 | - | -797 | - | -1,288 | QPRINM2X | (OWNYF = '100' OR OWNYF = '200') AND (LOANTYPE = '1') |
| 830201 | - | -790 | - | -1,301 | QPRINM3X | (OWNYF = '100' OR OWNYF = '200') AND (LOANTYPE = '1') |

| <u>UCC</u> | <u>Critical value +</u> | <u>Critical value -</u> | <u>Topcode value +</u> | <u>Topcode value -</u> | <u>Mapped from</u> | <u>Condition</u> |
|------------|-------------------------|-------------------------|------------------------|------------------------|--------------------|---|
| 830202 | - | -686 | - | -1,313 | QPRINM1X | (OWNYF = '300') AND (LOANTYPE = '1') |
| 830202 | - | -662 | - | -1,309 | QPRINM2X | (OWNYF = '300') AND (LOANTYPE = '1') |
| 830202 | - | -666 | - | -1,318 | QPRINM3X | (OWNYF = '300') AND (LOANTYPE = '1') |
| 830203 | - | -716 | - | -960 | QPRINM1X | (OWNYF = '100' OR OWNYF = '200') AND (LOANTYPE = '2') |
| 830203 | - | -721 | - | -977 | QPRINM2X | (OWNYF = '100' OR OWNYF = '200') AND (LOANTYPE = '2') |
| 830203 | - | -724 | - | -966 | QPRINM3X | (OWNYF = '100' OR OWNYF = '200') AND (LOANTYPE = '2') |
| 830204 | - | -983 | - | -1,025 | QPRINM1X | (OWNYF = '300' AND LOANTYPE = '2') |
| 830204 | - | -991 | - | -1,033 | QPRINM2X | (OWNYF = '300' AND LOANTYPE = '2') |
| 830204 | - | -1,000 | - | -1,042 | QPRINM3X | (OWNYF = '300' AND LOANTYPE = '2') |
| 830301 | 340,000 | - | 482,020 | - | ORGMRTX | (OWNYF = '100' OR OWNYF = '200') AND (LOANTYPE = '1') |
| 830302 | 200,006 | - | 307,500 | - | ORGMRTX | (OWNYF = '300' AND (LOANTYPE = '1') |
| 830303 | 92,000 | - | 142,409 | - | ORGMRTX | (OWNYF = '100' OR OWNYF = '200') AND (LOANTYPE = '2') |
| 860600 | - | -18,500 | - | -32,500 | SALEX | VEHICYC = '160' |
| 880120 | - | -2,823 | - | -6,735 | JLCPRINX | OWNYH = '100' OR OWNYH = '200' |
| 880220 | - | -856 | - | -2,886 | JLCPRINX | OWNYH = '400' OR OWNYH = '500' |
| 880320 | - | -1,318 | - | -1,696 | JLCPRINX | OWNYH = '300' |
| 900002 | 1,200 | - | 2,863 | - | MISCEXPX | MISCCODE = '380' |
| 910050 | 250 | - | 384 | - | RNTEQVX | OWNYI = '100' |
| 910100 | 333 | - | 509 | - | RNTEQVX | OWNYI = '300' |

These UCCs have a critical value, but no topcode amount. This implies that there are no observations outside the critical value on the current five-quarter release.

| <u>UCC</u> | <u>Critical value +</u> | <u>Critical value -</u> | <u>Mapped from</u> | <u>Condition</u> |
|------------|-------------------------|-------------------------|--------------------|---|
| 570220 | - | - | MEDRMBX | MEDRCARY = '520' |
| 570240 | 2,667 | - | JFEETOTX | REGFEECR = '2900' |
| 570240 | 2,667 | - | QSPCLX | SPFEECR = '2900' |
| 570901 | - | - | MEDRMBX | MEDRCARY = '650' |
| 790950 | 25,000 | - | ORGMRTX | (OWNYF = '400' OR OWNYF = '500') AND (LOANTYPE = '2') |
| 830304 | - | - | ORGMRTX | (OWNYF = '300' AND (LOANTYPE = '2') |

D. INCOME FILE (ITAB)

Data in the ITAB file are selected annual data from the FMLY file expressed in a monthly form (divided by 12). The ITAB variable VALUE is subject to topcoding for the following UCCs.

| <u>UCC</u> | <u>Description</u> |
|------------|---|
| 001000 | Purchase price of stocks, bonds, or mutual funds |
| 001010 | Net amount received from sales of stocks, bonds, mutual funds |
| 001210 | Amount of investment in own farm or business |
| 001220 | Amount of assets, goods, and services withdrawn from own farm or business |
| 002010 | Difference in amount held in savings accounts |
| 002020 | Difference in amount held in checking accounts |
| 002030 | Difference in amount held in U.S. Savings bonds |
| 003000 | Difference in amount of money owed to CU |
| 003100 | Amount received from settlement on surrender of any insurance policies |

| <u>UCC</u> | <u>Description</u> |
|-------------------|---|
| 800910 | Amount of government retirement deducted from last pay, annualized for all CU members |
| 800920 | Amount of Railroad Retirement deducted from last pay, annualized for all CU members |
| 800931 | Amount of private pension fund deducted from last pay, annualized for all CU members |
| 900001 | Amount of occupational expenses |
| 900040 | Amount received from pensions or annuities |
| 900050 | Amount received from regular income from dividends, royalties, estates or trusts |
| 900060 | Amount of net income or loss received from roomers or boarders |
| 900070 | Amount of net income or loss received from other rental units |
| 900080 | Amount received from interest on savings accounts or bonds |
| 900131 | Amount received from other child support payments |
| 900132 | Amount received from other regular contributions including alimony |
| 900140 | Amount received from other money income |
| 910000 | Amount received from lump sum receipts |
| 910010 | Amount received from sale of household furnishings, equipment |
| 910020 | Amount of refund received from overpayment on Social Security |
| 910030 | Amount of refund received from insurance policies |
| 910040 | Amount of refund received from property taxes |
| 910041 | Amount received from lump sum child support payment |
| 920010 | Amount in savings accounts |
| 920020 | Amount in checking, brokerage and other similar accounts |
| 920030 | Amount in U.S. Savings bonds |
| 920040 | Estimated market value all stocks, bonds, mutual funds |
| 950000 | Amount of Federal income tax paid |
| 950001 | Amount of refund received from Federal income tax |
| 950010 | Amount of state and local income taxes paid |
| 950011 | Amount of refund received from state and local taxes |
| 950021 | Amount of other taxes paid |
| 950022 | Amount of personal property taxes paid |
| 950023 | Amount of refund received from other sources |
| 980020 | Age of reference person |

If VALUE is greater (less) than the designated critical values for the above UCCs, VALUE is set to the topcode value and the associated flag variable, VALUE_, is set to 'T'. The critical values and topcode values (rounded to the nearest dollar) of the variable VALUE that are associated with the above UCCs follow.

| <u>UCC</u> | <u>Critical value +</u> | <u>Critical value -</u> | <u>Topcode value +</u> | <u>Topcode value -</u> |
|-------------------|--------------------------------|--------------------------------|-------------------------------|-------------------------------|
| 001000 | 12,500 | - | 161,654 | - |
| 001010 | - | -25,000 | - | -279,932 |
| 001210 | 16,667 | - | 172,776 | - |
| 001220 (WDBSASTX) | - | -33,333 | - | -520,000 |
| 001220 (WDBSGDSX) | - | -6,666 | - | -57,776 |
| 002010 | 5,167 | -5,000 | 37,569 | -55,099 |
| 002020 | 2,083 | -3,333 | 23,012 | -54,558 |
| 002030 | 1,250 | -333 | 16,668 | -1,568 |
| 003000 | 2,917 | -3,917 | 25,088 | -27,716 |
| 003100 | - | -3,667 | - | -44,500 |
| 900040 | 4,167 | - | 5,791 | - |
| 900050 | 4,167 | - | 9,003 | - |
| 900060 | 2,650 | -1,036 | 3,478 | -1,238 |
| 900070 | 3,700 | -2,106 | 12,527 | -4,501 |
| 900080 | 2,917 | - | 5,359 | - |
| 900131 | 1,200 | - | 1,734 | - |
| 900132 | 2,000 | - | 9,758 | - |

| <u>UCC</u> | <u>Critical value +</u> | <u>Critical value -</u> | <u>Topcode value +</u> | <u>Topcode value -</u> |
|--------------------------------|-------------------------|-------------------------|------------------------|------------------------|
| 900140 | 2,083 | - | 7,265 | - |
| 910000 | 8,333 | - | 31,590 | - |
| 910010 | 433 | - | 1,672 | - |
| 910020 | 400 | - | 825 | - |
| 910030 | 142 | - | 975 | - |
| 910040 | 150 | - | 267 | - |
| 910041 | 958 | - | 1,431 | - |
| 920010 | 8,333 | - | 73,556 | - |
| 920020 | 2,364 | - | 51,968 | - |
| 920030 | 3,333 | - | 19,616 | - |
| 920040 | 66,667 | - | 581,212 | - |
| 950000 (FEDTAXX) ¹ | 2,083 | - | 6,509 | - |
| 950001 | - | -500 | - | -891 |
| 950010 (SLOCTAXX) ² | 500 | - | 1,579 | - |
| 950011 | - | -150 | - | -254 |
| 950021 | 442 | - | 746 | - |
| 950022 | 150 | - | 249 | - |
| 950023 | - | -133 | - | -714 |
| 980020 | 7 | - | 7 | - |

¹ FEDTAXX (amount of Federal tax paid in addition to that withheld) and FAMTFEDX (Federal tax withheld from last pay annualized for all CU members) are both mapped to UCC 950000 as separate records. Records for UCC 950000 that represent FAMTFEDX are topcoded through their components (AMTFED) at the MEMB level and thus, these records will not have an ITAB critical value. ITAB records for UCC 950000 that represent FEDTAXX are topcoded for all amounts greater than \$2,083.

² SLOCTAXX (amount of state and local taxes paid in addition to that withheld) and FSLTAXX (state and local income tax deduction from last pay annualized for all CU members) are both mapped to UCC 950010 as separate records. Records for UCC 950010 that represent FSLTAXX are topcoded through their components (SLTAXX) at the MEMB level and thus, these records will not have an ITAB critical value. ITAB records for UCC 950010 that represent SLOCTAXX are topcoded for all amounts greater than \$500.

VALUE for the following income UCCs is topcoded because the FMLY file variables corresponding to these UCCs are topcoded due to recalculation. (See Section IV.A. CU CHARACTERISTICS AND INCOME FILE on topcoding of FMLY variables.)

| <u>UCC</u> | <u>FMLY variable</u> | <u>Description</u> |
|------------|----------------------|---|
| 800910 | FGOVRETX | Amount of government retirement deducted from last pay, annualized for all CU members |
| 800920 | FRRDEDX | Amount of Railroad Retirement deducted from last pay, annualized for all CU members |
| 800931 | FPRIPENX | Amount of private pension fund deducted from last pay, annualized for all CU members |
| 800932 | FINDRETX | Amount of money placed in individual retirement plan |
| 800940 | FJSSDEDX | Estimated amount of annual Social Security contribution |
| 900000 | FSALARYX | Amount received from wage and salary income before deductions |
| 900010 | FNONFRMX | Amount of income or loss received from own nonfarm business |
| 900020 | FFRMINCX | Amount of income or loss received from own farm |
| 980000 | FINCBTAX | Amount of CU income before taxes |
| 980070 | FINCATAX | Amount of CU income after taxes |

E. DETAILED EXPENDITURE FILES (EXPN)

The following EXPN file variables are subject to topcoding.

| <u>Survey Section</u> | <u>File name</u> | <u>Variable</u> | <u>Description</u> |
|-----------------------|------------------|---|--|
| 2. A&B. | RNT | QRT3MCMX | Total rental payments made in reference period, adjusted for business and rooms rented to others |
| 3. B. | OPB | PROPVALX | About how much do you think this property would sell for on today's market? |
| | | OWN_PURX | What was the total price paid for the property, not including closing costs? |
| 3. D. | OPD | DISPX | What was the selling price (trade-in value)? |
| 3. F. | MOR | ORGMRTX | What was the amount of the mortgage when you obtained it, excluding any interest? |
| | | MRTPMTX | Mortgage payment, including escrow |
| | | QBLNCM1X | Principal balance outstanding at beginning of month, 3 months ago |
| | | QBLNCM2X | Principal balance outstanding at beginning of month, 2 months ago |
| | | QBLNCM3X | Principal balance outstanding at beginning of month, 1 month ago |
| | | QPRINM1X | Amount of principal paid during first month of reference period |
| | | QPRINM2X | Amount of principal paid during second month of reference period |
| | | QPRINM3X | Amount of principal paid during third month of reference period |
| 3. G. | HEL | ORGMRTG | What was the amount of the lump sum home equity loan when you obtained it, excluding any interest? |
| | | MRTPMTG | Loan payment |
| | | QBLNCM1G | Principal balance outstanding at beginning of month, 3 months ago |
| | | QBLNCM2G | Principal balance outstanding at beginning of month, 2 months ago |
| | | QBLNCM3G | Principal balance outstanding at beginning of month, 1 month ago |
| | | QPRINM1G | Amount of principal paid during first month of reference period |
| | | QPRINM2G | Amount of principal paid during second month of reference period |
| | | QPRINM3G | Amount of principal paid during third month of reference period |
| 3. H. | OPH | JLCPRINX | Estimated amount of principal paid on loan during reference period |
| 3. I. | OPI | JFEETOTX | Amount of regular condo fee for management services, adjusted for business |
| | | QSPCLX | Total amount of special payments for management services, adjusted for business |
| | | QLR3MCMX | Amount paid for ground or land rent, adjusted for business |
| | | QLMPSUMX | Amount paid for mortgage in special or lump sum payments during reference period |
| | | RNTEQVX | Monthly rental equivalence of owned home |
| 11. B. | OVB | <i>For confidentiality reasons, records with VEHICYB='190' (private plane) are not included on the public use files.</i> | |
| | | NETPURX | Amount paid for boat with motor |
| | | <i>If NETPURX is topcoded, then the following variables are suppressed (blanked out) and their flags are given a 'T'.</i> | |
| | | TRADEX | How much was the trade in allowance received? |
| | | EMPLEXPX | How much of the amount or price was paid by an employer? |
| | | DNPAYMTX | What was the amount of the cash down payment? |
| | | PRINCIPX | How much was borrowed, excluding any interest? |
| | | PAYMENTX | What is the amount of each payment? |
| | | QBALNM1X | Principal balance outstanding at the beginning of first month of reference period |
| | | QVINTM1X | Amount of interest paid during first month of reference period |
| | | QVPRIM1X | Amount of principal paid during first month of reference period |
| | | QBALNM2X | Principal balance outstanding at the beginning of second month of reference period |
| | | QVINTM2X | Amount of interest paid during second month of reference period |
| | | QVPRIM2X | Amount of principal paid during second month of reference period |
| | | QBALNM3X | Principal balance outstanding at the beginning of third month of reference period |
| | | QVINTM3X | Amount of interest paid during third month of reference period |
| | | QVPRIM3X | Amount of principal paid during third month of reference period |
| | | QTRADEX | Amount paid for vehicle after trade- in allowance minus amount of cost paid by employer |
| | | QADITR1X | Amount of interest paid during first month of reference period, adjusted for business |
| | | QADITR2X | Amount of interest paid during second month of reference period, adjusted for business |
| | | QADITR3X | Amount of interest paid during third month of reference period, adjusted for business |

| <u>Survey Section</u> | <u>File name</u> | <u>Variable</u> | <u>Description</u> |
|-----------------------|------------------|-----------------|--|
| | | QDNPYMTX | Amount of down payment, adjusted for business |
| 11. C. | OVC | | <i>For confidentiality reasons, records with VEHICYC='190' (private plane) are not included on the public use files.</i> |
| | | SALEX | Amount boat with motor sold for |
| | | | <i>If SALEX is topcoded, then the variable FINPAYMX (How much was the final payment made on any outstanding loan?) is suppressed for that record, and flagged as topcoded.</i> |
| 12. A. | VEQ | | <i>For confidentiality reasons, records with VOPVEHYA= '190' (Private plane) are not included on the public use microdata.</i> |
| 15. B. | MDB | MEDPMTX | Amount of payment for medical supplies or services |
| 15. D. | MDC | MEDRMBX | Amount of reimbursement for medical supplies or services |
| 16. | EDA | JEDUCNET | Net amount paid for educational expenses (housing) |
| 18. B&C. | TRV | LDGCOSTX | Cost for hotels, motels, cottages, trailer camps, or other lodging including taxes and tips |
| 18. D. | TRD | TOTYUPDX | Amount of (lodging) expense not covered by a business, employer, or other non-CU member (for trips funded by non-CU member) |
| 18. E. | TRE | TRNONCUX | Amount of the (lodging) expense paid for non CU member |
| 19. A | MIS | MISCEXPX | Amount spent on miscellaneous expenditures |

The critical values and topcode values associated with the above EXPN variables follow.

| <u>Survey Section</u> | <u>File name</u> | <u>Variable</u> | <u>Critical value +</u> | <u>Topcode value +</u> | <u>Condition</u> |
|-----------------------|------------------|-----------------|-------------------------|------------------------|--------------------------------|
| 2. A&B. | RNT | QRT3MCMX | 4,500 | 6,337 | - |
| 3. B. | OPB | PROPVALX | 500,000 | 857,282 | OWNYB = '100' or OWNYB = '200' |
| | | PROPVALX | 650,000 | 2,095,192 | OWNYB = '300' |
| | | PROPVALX | 500,000 | 931,278 | OWNYB = '400' or OWNYB = '500' |
| | | OWN_PURX | 425,000 | 679,317 | OWNYB = '100' or OWNYB = '200' |
| | | OWN_PURX | 500,000 | 528,750 | OWNYB = '300' |
| | | OWN_PURX | 217,000 | 298,000 | OWNYB = '400' or OWNYB = '500' |
| 3. D. | OPD | DISPX | 470,500 | 586,000 | OWNYD = '100' or OWNYD = '200' |
| | | DISPX | 425,000 | 526,250 | OWNYD = '300' |
| | | DISPX | 190,000 | 430,000 | OWNYD = '400' or OWNYD = '500' |
| 3. F. | MOR | ORGMRTX | 300,000 | 417,073 | OWNYF = '100' or OWNYF = '200' |
| | | ORGMRTX | 250,000 | 337,192 | OWNYF = '300' |
| | | ORGMRTX | 175,908 | 388,440 | OWNYF = '400' or OWNYF = '500' |
| | | MRTXPMX | 2,698 | 3,950 | - |
| | | QBLNCM1X | 290,097 | 389,070 | ('100' <= OWNYF <= '500') |
| | | QBLNCM2X | 290,151 | 390,513 | ('100' <= OWNYF <= '500') |
| | | QBLNCM3X | 292,443 | 394,421 | ('100' <= OWNYF <= '500') |
| | | QPRINM1X | 798 | 1,284 | OWNYF = '100' or OWNYF = '200' |
| | | QPRINM1X | 686 | 1,313 | OWNYF = '300' |
| | | QPRINM1X | 1,199 | 1,648 | OWNYF = '400' or OWNYF = '500' |
| | | QPRINM2X | 797 | 1,288 | OWNYF = '100' or OWNYF = '200' |
| | | QPRINM2X | 662 | 1,309 | OWNYF = '300' |
| | | QPRINM2X | 1,209 | 1,661 | OWNYF = '400' or OWNYF = '500' |
| | | QPRINM3X | 790 | 1,301 | OWNYF = '100' or OWNYF = '200' |
| | | QPRINM3X | 666 | 1,318 | OWNYF = '300' |
| | | QPRINM3X | 1,219 | 1,487 | OWNYF = '400' or OWNYF = '500' |
| 3. G. | HEL | ORGMRTG | 100,000 | 136,252 | OWNYG = '100' or OWNYG = '200' |
| | | ORGMRTG | 30,000 | 96,781 | OWNYG = '300' |
| | | ORGMRTG | 1,000 | 20,000 | OWNYG = '400' or OWNYG = '500' |
| | | MRTXPMG | 1,282 | 1,644 | - |
| | | QBLNCM1G | 85,442 | 114,132 | '100' <= OWNYG <= '500' |
| | | QBLNCM2G | 89,716 | 116,927 | '100' <= OWNYG <= '500' |
| | | QBLNCM3G | 89,372 | 115,930 | '100' <= OWNYG <= '500' |
| | | QPRINM1G | 716 | 960 | OWNYG = '100' or OWNYG = '200' |

| <u>Survey Section</u> | <u>File name</u> | <u>Variable</u> | <u>Critical value +</u> | <u>Topcode value +</u> | <u>Condition</u> |
|-----------------------|------------------|-----------------|-------------------------|------------------------|-------------------------------------|
| | | QPRINM1G | 983 | 1,025 | OWNYG = '300' |
| | | QPRINM1G | 156 | 160 | OWNYG = '400' or OWNYG = '500' |
| | | QPRINM2G | 721 | 977 | OWNYG = '100' or OWNYG = '200' |
| | | QPRINM2G | 991 | 1,033 | OWNYG = '300' |
| | | QPRINM2G | 19 | 66 | OWNYG = '400' or OWNYG = '500' |
| | | QPRINM3G | 724 | 966 | OWNYG = '100' or OWNYG = '200' |
| | | QPRINM3G | 1,000 | 1,042 | OWNYG = '300' |
| | | QPRINM3G | 19 | 67 | OWNYG = '400' or OWNYG = '500' |
| 3. H. | OPH | JLCPRINX | 8,468 | 20,205 | OWNYH = '100' or OWNYH = '200' |
| | | JLCPRINX | 2,569 | 5,089 | OWNYH = '300' |
| | | JLCPRINX | 3,953 | 22,821 | OWNYH = '400' or OWNYH = '500' |
| 3. I. | OPI | QLR3MCMX | 1,440 | 1,827 | OWNYI = '100' or OWNYI = '200' |
| | | QLR3MCMX | 2,800 | 3,329 | OWNYI = '300' |
| | | QLMPSUMX | 4,200 | 27,479 | OWNYI = '100' or OWNYI = '200' |
| | | QLMPSUMX | 2,200 | 41,956 | OWNYI = '300' |
| | | QLMPSUMX | 900 | 1,100 | OWNYI = '400' or OWNYI = '500' |
| | | RNTEQVX | 3,000 | 4,668 | OWNYI = '100' or OWNYI = '200' |
| | | RNTEQVX | 4,000 | 7,155 | OWNYI = '300' |
| 11. B. | OVB | NETPURX | 127,500 | 171,200 | VEHICYB = '160' |
| 11. C. | OVC | SALEX | 18,500 | 32,500 | VEHICYC = '160' |
| 15. B. | MDB | MEDPMTX | 325 | 1,094 | MEDPCARY = '110' |
| | | MEDPMTX | 1,200 | 2,142 | MEDPCARY = '200' |
| | | MEDPMTX | 2,684 | 4,194 | MEDPCARY = '310' |
| | | MEDPMTX | 1,500 | 2,499 | MEDPCARY = '320' |
| | | MEDPMTX | 500 | 993 | MEDPCARY = '410' |
| | | MEDPMTX | 350 | 861 | MEDPCARY = '420' |
| | | MEDPMTX | 600 | 1,486 | MEDPCARY = '510' |
| | | MEDPMTX | 3,800 | 3,958 | MEDPCARY = '520' |
| | | MEDPMTX | 900 | 2,034 | MEDPCARY = '530' |
| | | MEDPMTX | 200 | 434 | MEDPCARY = '630' |
| | | MEDPMTX | 650 | 2,409 | MEDPCARY = '640' |
| | | MEDPMTX | 245 | 1,050 | MEDPCARY = '650' |
| | | MEDPMTX | 275 | 435 | MEDPCARY = '660' |
| 15. D. | MDC | MEDRMBX | 436 | 731 | MEDRCARY = '110' |
| | | MEDRMBX | 1,266 | 2,521 | MEDRCARY = '200' |
| | | MEDRMBX | 600 | 5,198 | MEDRCARY = '310' |
| | | MEDRMBX | 2,400 | 6,000 | MEDRCARY = '320' |
| | | MEDRMBX | 600 | 750 | MEDRCARY = '410' |
| | | MEDRMBX | 800 | 1,511 | MEDRCARY = '420' |
| | | MEDRMBX | 368 | 819 | MEDRCARY = '510' |
| | | MEDRMBX | 500 | 734 | MEDRCARY = '530' |
| | | MEDRMBX | 20 | 96 | MEDRCARY = '630' |
| | | MEDRMBX | 135 | 2,022 | MEDRCARY = '640' |
| | | MEDRMBX | 157 | 893 | MEDRCARY = '660' |
| 16. | EDA | JEDUCNET | 3,499 | 4,972 | EDUC_AY = '310' |
| 18. B&C. | TRV | LDGCOSTX | 1,200 | 2,189 | - |
| 18. D. | TRD | TOTYUPDX | 614 | 1,361 | TOTYUPDY = '130' |
| 18. E. | TRE | TRNONCUX | 644 | 727 | TRNONCUY = '130' |
| 19. A | MIS | MISCEXPX | 1200 | 3587 | MISCCODE = '380' and MISCMO = '13' |
| 19. A | MIS | MISCEXPX | 400 | 886 | MISCCODE = '380' and MISCMO NE '13' |

These EXPN variables have a critical value, but no topcode amount. This implies that there are no observations outside the critical value on the current five-quarter release.

| <u>Survey Section</u> | <u>File name</u> | <u>Variable</u> | <u>Critical value +</u> | <u>Condition</u> |
|-----------------------|------------------|-----------------|-------------------------|--|
| 3. I. | OPI | JFEETOTX | 2,500 | ('100' <= OWNYI <= '300') and REGFEECR = '01000' |
| | | JFEETOTX | 8,000 | ('100' <= OWNYI <= '300') and REGFEECR = '29000' |
| | | QSPCLX | 2,500 | ('100' <= OWNYI <= '300') and SPFEECR = '01000' |
| | | QSPCLX | 8,000 | ('100' <= OWNYI <= '300') and SPFEECR = '29000' |
| 15. D. | MDC | RNTEQVX | | - OWNYI = '400' or OWNYI = '500' |
| | | MEDRMBX | | - MEDRCARY = '520' |
| | | MEDRMBX | | - MEDRCARY = '650' |

V. ESTIMATION PROCEDURE

A. DESCRIPTION OF PROCEDURES

The following section describes procedures for using microdata for the estimation of descriptive statistics such as aggregates and means. A sample program written in SAS that illustrates this methodology is in Section VII. MICRODATA VERIFICATION AND ESTIMATION METHODOLOGY

1. GENERAL CONCEPTS

a. *SAMPLE VERSUS POPULATION ESTIMATES*

As described in Section X.C. WEIGHTING, each CU in the CE sample represents a given number of CUs in the U.S. population. The translation of sample CUs into a population estimate is accomplished by weighting. FINLWT21, one of the 45 weight variables associated with each CU, is used to estimate the population. Procedures for estimating sample (unweighted) and population (weighted) statistics are described in Sections V.A.2. ESTIMATION OF UNWEIGHTED STATISTICS and V.A.3. ESTIMATION OF WEIGHTED STATISTICS below.

b. *CALENDAR PERIOD VERSUS COLLECTION PERIOD*

Because the rotating panel design of the Interview survey has an effect on the structure of the data files, one must be aware of the distinction between calendar period and collection period in producing estimates. (See Section X.A. SURVEY SAMPLE DESIGN for a description of the panel rotation scheme.)

Respondents are asked to report expenditures made since the first of the month three months prior to the interview month. For example, if a CU is interviewed in February of 2002, they are reporting expenditures for November and December of 2001, and January of 2002. This is illustrated in the rotation chart below. The period between November 1 and January 31 is referred to as the reference period for the interview.

| Month of Expenditure | Month of Interview | | | | | |
|----------------------|--------------------|------------------|---------------|---------------|-------------|--------------|
| | January Panel A | February Panel B | March Panel C | April Panel A | May Panel B | June Panel C |
| October | X | | | | | |
| November | X | X | | | | |
| December | X | X | X | | | |
| January | | X | X | X | | |
| February | | | X | X | X | |
| March | | | | X | X | X |
| April | | | | | X | X |
| May | | | | | | X |

Please note that UCCs 006001 and 006002 -- total amount owed to creditors (2nd and 5th interviews) -- do not adhere to the above mapping scheme. They are mapped to the month of the interview, *not* to preceding months.

The microdata files are organized and identified by collection period, i.e., the month of the interview. Thus, the MTAB file for the second quarter of 2002 contains expenditure data collected in interviews that took place in April, May, and June of 2002. Referring to the rotation chart, one can see that this MTAB file contains expenditures made between January 2002 and May 2002. Similarly, the MTAB file for the third quarter of 2002 (interviews conducted between July and September) contains expenditures made between April and August 2002. To obtain all expenditures made in January 2002, one should access the MTAB files for both the first and second quarters of 2002. The MTAB file for the first quarter of 2002 would contain January expenditures made by CUs interviewed in February and March 2002, while the MTAB file for the second quarter of 2002 would contain January expenditures made by CUs interviewed in April 2002.

As a consequence, users should be clear as to whether they desire estimates based on when expenditures were reported (collection period) or when expenditures were made (calendar period).

To produce an annual estimate for 2002 based on collection period, that is, from all interviews conducted in 2002, data users need data only from Q021 through Q024 files. However, to produce a 2002 annual estimate based on expenditures made in 2002 (calendar period), one needs to access five collection-quarter files, the first quarter of 2002 through the first quarter of 2003. (The estimates published by BLS are based on calendar periods that require the subsequent year's first quarter data).

The ITAB files are derived in a slightly different manner than MTAB. As was mentioned in the description of the ITAB file, the data on the file represents the conversion of annual and point-of-interview data into a monthly format compatible with MTAB. Looking at a CU interviewed in January 2002, as an example, nonfarm business income earned over the previous 12 months would be collected and recorded as such on the FMLY file. For the ITAB file, this annual amount would be divided by 12, and separate records would be created for October, November, and December each containing that amount.

The variables REF_MO, REF_YR, QINTRVMO, and QINTRVYR indicate reference month of expenditure, reference year of expenditure, interview month, and interview year, respectively. REF_MO and REF_YR, in the MTAB and ITAB files, can be used to select all data for the desired period in which expenditures were made. Because of the interview rotation pattern, there is a one-month to three-month lag between the time an expenditure occurs and the time it is reported. QINTRVMO and QINTRVYR can be used to identify the collection reference period.

In addition to its effect on the selection of data prior to estimation, this distinction between collection period and calendar period also directly affects the estimation procedure for producing means. In computing means based on data collected from all CUs interviewed in a given time frame (e.g., year, quarter, 8 months), the potential contribution of each CU to the mean is the same. That is each CU can contribute data from the entire reference period to the estimate. On the other hand, in computing means based on expenditures made in a given time frame, the potential contribution of each CU to the mean

varies depending on how closely the reference period for an interview coincides with the time frame desired. To see this more clearly, refer once again to the rotation chart. To compute a mean for expenditures made during the first quarter of the year, one would obtain data from CUs interviewed between February and June. However, their potential contributions to the mean are not equal. CUs interviewed in February only contribute 'one-third' of the expenditures they made during the reference period to the estimate (their January expenditures), while CUs interviewed in April contribute all their expenditures to the estimate.

As a result, the population (the denominator in the equation for a mean) has to be adjusted to account for the difference in contribution among CUs. At BLS, we create a variable, MO_SCOPE that shows the number of months a CU's interview can contribute to the mean or is "in scope" for the time period the estimate will cover. All CUs interviewed in the same month will have identical values for MO_SCOPE, as their potential contribution to the mean is the same. Thus, MO_SCOPE will be conditioned on the value of QINTRVMO (and possibly QINTRVYR).

Continuing with our example of estimating a mean for expenditures made during the first quarter of the year, we would access data from files for the first and second quarter of the year. MO_SCOPE would be derived as explained below.

If QINTRVMO is 1 then MO_SCOPE is 0
if QINTRVMO is 2 then MO_SCOPE is 1
if QINTRVMO is 3 then MO_SCOPE is 2
if QINTRVMO is 4 then MO_SCOPE is 3
if QINTRVMO is 5 then MO_SCOPE is 2
if QINTRVMO is 6 then MO_SCOPE is 1

Note that MO_SCOPE has a value of 0 for CUs interviewed in January, as they report expenditures for October through December, totally outside the period of interest. One could extract a data set of only CUs interviewed between February and June to eliminate that condition. How MO_SCOPE is used in estimation will be discussed later.

c. TIME PERIOD DIFFERENCES

It has been mentioned previously that these files contain data that can cover a variety of time periods. Values for MTAB and ITAB variables are monthly. Values for variables on the FMLY and MEMB files can vary. For example income variables are for annual time periods and demographic variables are as of the time of interview. As such, users should pay particular attention to the descriptions of variables in the detailed listings of Section III.E. DETAILED VARIABLE DESCRIPTIONS.

This is particularly important where the user may have a choice between variables on two files that contain the same data adjusted to reflect different time periods. For instance, FMLY income data are annual covering the 12-month period prior to the collection month, whereas in ITAB these income data have been converted into monthly values. Selected demographic characteristic variables in the FMLY files contain values as of the date of interview. In the ITAB files, these values are treated as if they were "annual" amounts, and are converted to monthly records by dividing the values by 12. To illustrate each of these cases, the following example looks at a CU interviewed in April whose reference person is 60 years old at the time of interview and where CU income from wages and salaries over the previous 12 months is \$48,000.

| | FMLY | | ITAB | |
|-----------------|---------------|------------|---------------|--------------|
| <u>VARIABLE</u> | <u>AMOUNT</u> | <u>UCC</u> | <u>AMOUNT</u> | <u>MONTH</u> |
| FSALARYX | \$48,000 | 900000 | \$4,000 | JAN |
| | | 900000 | \$4,000 | FEB |
| | | 900000 | \$4,000 | MAR |
| AGE_REF | 60 | 980020 | 5 | JAN |
| | | | 5 | FEB |
| | | | 5 | MAR |

Users should be aware of these time period differences when using the data.

d. *COMPARISONS WITH PUBLISHED CE DATA*

The mean values for some income and expenditure items which appear in CE publications are different than those derived from the Interview public-use microdata because some variables are topcoded or suppressed on the public-use files, but are not so treated on BLS's own data base in producing published data. (For detailed topcoding information, see Section IV. TOPCODING AND OTHER NONDISCLOSURE REQUIREMENTS.)

2. ESTIMATION OF UNWEIGHTED STATISTICS

a. *AGGREGATE STATISTICS*

To compute unweighted aggregate expenditures from data on the MTAB files, one would sum the value of the COST field for MTAB records of interest. These records could be selected on the basis of factors such as item category, month or year of occurrence, or characteristics of the CU or its members. While MTAB is a monthly file, there is no summation done at the monthly level for each CU for expenditures with similar UCC and gift characteristics. Thus one may find multiple MTAB records with identical characteristics including COST, if the CU reported the expenditures as discrete purchases. A similar approach can be applied to estimate aggregate income from data on the ITAB files, summing the VALUE field on the appropriate records.

Certain MTAB and ITAB item categories are collected only in the 5th interview. Therefore, the data are reported by only one-fourth of the sample at any time. For some categories, the reported values have been multiplied by 4 to expand them to represent the total sample, while in other categories, this has not been done. When estimating for these UCCs, values should be multiplied by 4 for total sample representation. (See Sections III.F.3 MONTHLY EXPENDITURES (MTAB) FILE and III.F.4 INCOME (ITAB) FILE.)

The estimation of aggregates for FMLY and MEMB file variables is similar to that for MTAB and ITAB variables. To estimate aggregates from data on the FMLY file, one would sum the value of the desired variable field for FMLY records selected on the basis of, for example, other CU characteristic variables on the FMLY file, characteristics of CU members, expenditures made, and month or year of interview. Aggregates for MEMB file variables would be developed in a similar fashion.

The user must be careful in interpreting what the aggregate represents because of the time period differences between variables on different files. For example, summing the COST field of MTAB records representing purchases for a UCC that occurred in a specific month will yield an aggregate monthly expenditure for that UCC. However, summing the value of a FMLY file variable such as

FSALARYX for all CUs interviewed in a specific month will yield an aggregate annual value for that variable.

In general, one can use an aggregate derived for a certain time period to extrapolate an aggregate estimate for a longer time period. A typical case is the estimation of annual aggregates based on an aggregate using less than 12 months of data. To do this, divide the number of months for which the estimate is desired (12) by the number of months of expenditure data being used and multiply the aggregate by that quotient.

b. MEANS

There are two types of means that are customarily derived from CE data. The most common is the sample mean computed over all CUs. The other is the mean of those reporting computed over only those CUs actually reporting the item. The following sections look at each type of mean.

(i) SAMPLE MEANS

Unweighted sample means are derived by computing an aggregate estimate for the desired item and dividing it by the sample size over the time period being estimated. Deriving an aggregate estimate has already been discussed; ascertaining the correct sample size is the next task.

The Interview survey is designed such that the CUs interviewed in each quarter represent one independent sample. Since there is one FMLY record for each sample CU, the national sample for the first quarter of 2002 is 7,691 CUs. (See Section III.B. RECORD COUNTS PER QUARTER.) The appropriate sample size for any time period will reflect the number of interviewed CUs eligible to report data over the period adjusted by the number of independent samples represented. As explained earlier, the major consideration is whether the desired estimate is a collection period estimate or a calendar period estimate.

To calculate the sample size for a collection period estimate, divide the total number of CUs interviewed by the quotient of the number of months in which these interviews occurred divided by 3. For example, one might wish to estimate the annual sample mean expenditure for men's shirts for all CUs interviewed in 2002. If one were to divide the aggregate expenditure on men's shirts from these interviews by the total number of CUs interviewed, one would get an annual sample mean about 1/4 as large as it should be, since the number of CUs interviewed represented four independent samples (one sample for each quarter of 2002). In fact, one would have derived the average quarterly sample mean rather than the annual sample mean. To get the annual sample mean, one would have to divide the total number of CUs interviewed by 4 (or 12 months divided by 3), thereby computing the average sample size over the year, and divide the aggregate by that amount.

As mentioned earlier, when one computes a calendar period estimate, the variable MO_SCOPE is required to adjust the sample size for the difference in potential contribution among CUs. Since one independent sample of CUs is represented in each quarter, the sum of MO_SCOPE for one quarter can be up to 3 times the independent sample (if MO_SCOPE = 3 for every CU interviewed in the quarter, the sum of MO_SCOPE would be equal 3 times the independent sample). To calculate the sample size for a calendar period estimate, sum MO_SCOPE for the appropriate CUs and divide by 3. Note that this makes sense in those instances where MO_SCOPE does not equal 3. Referring to the example where MO_SCOPE was introduced, we can see that summing MO_SCOPE for CUs interviewed in the second quarter of the year (QINTRVMO = 4-6) would yield approximately one independent sample as CUs interviewed in June would be counted twice while CUs interviewed in April would not be counted. Dividing this amount by 3 would yield a sample size of 1/3 the independent sample. Keep in mind that only 1/3 of the expenditures reported in those interviews occurred within the time period of the aggregate

being estimated. Only April data from May interviews and April-May data from June interviews would be included in the aggregate.

One can see how the computation of sample size is affected when one calculates the commonly-used annual calendar period estimate. A 2002 estimate would be based on data from interviews over five quarters. MO_SCOPE would take on the following values:

| | Interview Month and Year | | | | | | | | | |
|-----------------|---------------------------------|------------|-------------|------------|-------------|-------------|------------|------------|------------|--|
| | 2002 | | | | | 2002 | | | | |
| MO_SCOPE | <u>Jan</u> | <u>Feb</u> | <u>Mar</u> | <u>Apr</u> | <u>May</u> | <u>Jun</u> | <u>Jul</u> | <u>Aug</u> | <u>Sep</u> | |
| | 0 | 1 | 2 | 3 | 3 | 3 | 3 | 3 | 3 | |
| | | | 2002 | | 2003 | | | | | |
| MO_SCOPE | <u>Oct</u> | <u>Nov</u> | <u>Dec</u> | <u>Jan</u> | <u>Feb</u> | <u>Mar</u> | | | | |
| | 3 | 3 | 3 | 3 | 2 | 1 | | | | |

Summing MO_SCOPE for each of the five quarters and dividing by 3 would yield a value of 1/3 the independent sample for the first quarter of 2002, 2/3 the independent sample for the first quarter of 2003, and one independent sample for the second, third, and fourth quarters of 2002. Summed over the five quarters, this represents 4 independent samples, so the result should be divided by 4 to get the correct sample size of one average independent sample. Thus, the general rule in computing sample size for deriving an annual calendar period estimate is to sum MO_SCOPE over the five quarters and divide by 12.

(ii) MEANS OF THOSE REPORTING

The only difference between estimating a mean-of-those-reporting and estimating a sample mean is in selecting the appropriate CUs to use in the computation. The CUs to be used depend on the objective of the analysis. In deriving a sample mean, all sample units interviewed over the time period covered are included in the computation of sample size whether or not they reported the item being estimated. In computing a mean of those reporting, only those CUs reporting the desired item would be included. The aggregate estimate used in the numerator is the same in either case. The adjustments made for MO_SCOPE and the fact that each quarter represents one independent sample would apply in this case as well. It should be noted that means of those reporting are not U.S. population estimates. They cannot be used to calculate total expenditures or expenditure shares for the U.S. population. They are useful only at the computed level.

3. ESTIMATION OF WEIGHTED STATISTICS

By applying weights when computing aggregates or means, one transforms the results from sample estimates to population estimates. There are 45 weight variables on the FMLY file, WTREP01-WTREP44 and FINLWT21. All the WTREP variables are half-sample replicate weights that should be used in variance computation. Use FINLWT21 to estimate weighted statistics for the population of CUs.

Users should follow the procedures for estimating unweighted statistics described above. When estimating weighted aggregates, the desired cost or value field should be multiplied by FINLWT21 at the CU level before summing across all appropriate records. In determining the proper sample size when computing collection period means, divide the sum of FINLWT21 for the CUs interviewed by the quotient of the number of months in which these interviews occurred divided by 3. Where calendar period means are to be estimated, multiply MO_SCOPE by FINLWT21 for each CU prior to summing and dividing by 3.

B. DESCRIPTION OF FORMULAS

Expenditure items will be referred to in these descriptions, but income items can be handled similarly except where otherwise stated.

Definition of Terms:

Let

- S = all CUs in the subpopulation of interest
- x = item(s) of interest
- q = number of months for which estimate is desired
- m = number of months of interviews whose expenditures are to be used in calculating the estimate (collection period estimate)
- r = number of months in which expenditures were made to be used in calculating the estimate (calendar period estimate)
- j = individual CU in subpopulation S
- t = month of expenditure
- i = month of interview
- MSC = MO_SCOPE value

Then

- $E_{j,x,i}$ = 3-month expenditure by CU_j on item x reported at month i interview
- $E_{j,x,t}$ = monthly expenditure by CU_j on item x made during month t
- $W_{j,i,F21}$ = weight assigned to CU_j for interview at month i
- $W_{j,t,F21}$ = weight assigned to CU_j for interview where CU_j makes expenditure during month t

The F21 denotes FINLWT21, which is used for population estimates.

1. **AGGREGATE EXPENDITURE ESTIMATES (UNWEIGHTED)**

An estimate of unweighted aggregate expenditures for a collection period can be expressed as:

${}_{UK} X_{(S,x)(q,m)}$ = an unweighted collection (*UK*) period estimate of aggregate expenditures (X) by CUs in subpopulation S , indexed from $j = 1$ through k , on item x over q months of interviews, where data collected over m months of interviews are used.

or

$${}_{UK} X_{(S,x)(q,m)} = \left(\frac{q}{m} \right) \sum_{i=1}^m \left(\sum_{j=1}^k E_{x,j} \right)_i$$

An estimate of unweighted aggregate expenditures for a calendar period can be expressed as:

${}_{UC} X_{(S,x)(q,r)}$ = an unweighted calendar (*UC*) period estimate of aggregate expenditures (X) by CUs in subpopulation S , indexed from $j = 1$ through k , on item x over q months, where expenditures made over r months are used.

or

$${}_{UC} X_{(S,x)(q,r)} = \left(\frac{q}{r} \right) \sum_{t=1}^r \left(\sum_{j=1}^k E_{x,j} \right)_t$$

2. SAMPLE MEAN EXPENDITURE ESTIMATES (UNWEIGHTED)

An estimate of an unweighted mean expenditure for a collection period can be expressed as:

${}_{UK} \bar{X}_{(S,x)(q,m)}$ = an unweighted collection period estimate of the mean expenditure by CUs in subpopulation S on item x over a period of q months, where data collected over m months of interviews are used.

or

$${}_{UK} \bar{X}_{(S,x)(q,m)} = \left(\frac{{}_{UK} X_{(S,x)(q,m)}}{\sum_{i=1}^m \left(\sum_{j=1}^k S_j \right)_i} \right) \left(\frac{m}{3} \right)$$

An estimate of an unweighted mean expenditure for a calendar period can be expressed as:

${}_{UC} \bar{X}_{(S,x)(q,r)}$ = an unweighted calendar period estimate of the mean expenditure by CUs in subpopulation S on item x over a period of q months, where expenditures made over r months are used.

or

$${}_{UC} \bar{X}_{(S,x)(q,r)} = \left(\frac{{}_{UC} X_{(S,x)(q,r)}}{\sum_{t=1}^{r+3} \left(MSC \sum_{j=1}^k S_j \right)_t} \right) r$$

Note: For $t=1$, MO_SCOPE (MSC) = 0, since CUs interviewed in the first month for which the estimate is to be generated report expenditures outside the estimate period, i.e., in the previous quarter, month, etc. For $t = (r+3)$, MO_SCOPE = 1 since only 1 month's worth of expenditures have a chance to contribute to the calendar period of r months.

3. AGGREGATE EXPENDITURE ESTIMATES (WEIGHTED)

An estimate of weighted aggregate expenditures for a collection period can be expressed as:

${}_{WK} X_{(S,x)(q,m)}$ = a weighted collection (*WK*) period estimate of aggregate expenditures by CUs in subpopulation *S* on item *x* over a period of *q* months, where data collected over *m* months of interviews are used.

or

$${}_{WK} X_{(S,x)(q,m)} = \left(\frac{q}{m} \right) \sum_{i=1}^m \left(\sum_{j=1}^k (W_{j,F21} E_{x,j}) \right)_i$$

An estimate of weighted aggregate expenditures for a calendar period can be expressed as:

${}_{WC} X_{(S,x)(q,r)}$ = a weighted calendar (*WC*) period estimate of aggregate expenditures by CUs in subpopulation *S* on item *x* over *q* months, where expenditures made over *r* months are used.

or

$${}_{WC} X_{(S,x)(q,r)} = \left(\frac{q}{r} \right) \sum_{t=1}^r \left(\sum_{j=1}^k (W_{j,F21} E_{x,j}) \right)_t$$

4. SAMPLE MEAN EXPENDITURE ESTIMATES (WEIGHTED)

An estimate of a weighted mean expenditure for a collection period can be expressed as:

${}_{WK} \bar{X}_{(S,x)(q,m)}$ = a weighted collection (*WK*) period estimate of the mean expenditure by CUs in subpopulation *S* on item *x* over a period of *q* months, where data collected over *m* months of interviews are used.

or

$${}_{WK} \bar{X}_{(S,x)(q,m)} = \left(\frac{{}_{WK} X_{(S,x)(q,m)}}{\sum_{i=1}^m \left(\sum_{j=1}^k W_{j,F21} \right)_i} \right) \left(\frac{m}{3} \right)$$

An estimate of a weighted mean expenditure for a calendar period can be expressed as:

${}_{WC}\bar{X}_{(S,x)(q,r)}$ = a weighted calendar (WC) period estimate of the mean expenditure by CUs in subpopulation S on item x over a period of q months, where expenditures made over r months are used.

or

$${}_{WC}\bar{X}_{(S,x)(q,r)} = \left(\frac{{}_{WC}X_{(S,x)(q,r)}}{\sum_{t=1}^{r+3} \left[(MSC) \left(\sum_{j=1}^k W_{j,F21} \right) \right]_t} \right)$$

Note: For $t=1$, MO_SCOPE (MSC) = 0, since CUs interviewed in the first month for which the estimate is to be generated report expenditures outside the estimate period, i.e., in the previous quarter, month, etc. For $t = (r+3)$, MO_SCOPE = 1 since only 1 month's worth of expenditures have a chance to contribute to the calendar period of r months.

VI. RELIABILITY STATEMENT

A. DESCRIPTION OF SAMPLING AND NONSAMPLING ERRORS

Sample surveys are subject to two types of errors, sampling and non-sampling. Sampling errors occur because observations are not taken from the entire population. The standard error, which is the accepted measure for sampling error, is an estimate of the difference between the sample data and the data that would have been obtained from a complete census. The sample estimate and its estimated standard error enable one to construct confidence intervals.

Assuming the normal distribution applies to the means of expenditures, the following statements can be made:

- 1) The chances that an estimate from a given sample would differ from a complete census figure by less than one standard error are approximately 68 out of 100.
- 2) The chances that the difference would be less than 1.6 times the standard error are approximately 90 out of 100.
- 3) The chances that the difference would be less than two times the standard error are approximately 95 out of 100.

Nonsampling errors can be attributed to many sources, such as definitional difficulties, differences in the interpretation of questions, inability or unwillingness of the respondent to provide correct information, mistakes in recording or coding the data obtained, and other errors of collection, response, processing, coverage, and estimation of missing data. The full extent of the nonsampling error is unknown. Estimates using a small number of observations are less reliable. A small amount of nonsampling error can cause a small difference to appear significant even when it is not. It is probable that the levels of estimated expenditures obtained in the Interview survey are generally lower than the "true" level due to the above factors.

B. ESTIMATING SAMPLING ERROR

1. VARIANCE ESTIMATION

Variances can be estimated in many ways. The method illustrated below (a pseudo replication technique) is chosen because it is accurate and simple to understand. The basic idea is to construct several artificial "subsamples" from the original sample data such that the variance information of the original data is preserved in the subsamples. The subsamples (or pseudo replicates) can then be used to approximate variances for the estimates. Forty-four separate subsamples can be extracted from the data base using the replicate weight variables, WTREP01-WTREP44, associated with each CU. Note that only half of the CU's are assigned to each of the 44 replicates. The replicate weight variable contains a value greater than 0 for CU's assigned to that replicate. A value of missing is assigned to the weight variable for those CU's not included in a particular replicate.

The notation for the weighted collection period and calendar period estimates of aggregate expenditures in Section V.B.3 AGGREGATE EXPENDITURE ESTIMATES (WEIGHTED) does not explicitly identify the replicate as a variable because to calculate an aggregate (or mean) only FINLWT21 is used.

An estimate for the variance of an aggregate or mean estimate can be computed by generating 44 separate estimates using the 44 replicate weights and employing the standard formula for computing sample variance. To illustrate the estimation of variance, the notation must first be expanded to include the replicates explicitly.

Expenditure items will be referred to in these descriptions, but income items can be handled similarly except where otherwise stated.

Let the subscript "a" represent one of the 44 sets of replicate weights on the FMLY files. Following the earlier notation in Section V.B., we have.

${}_{AK} X_{(S,x)(q,m),a}$ = a collection period estimate of aggregate expenditures by CU's in subpopulation S on item x over a period of q months, using data collected over m months of interviews, calculated using the weights of the ath replicate

and,

${}_{AK} \bar{X}_{(S,x)(q,m),a}$ = a collection period estimate of the mean expenditure by CU's in subpopulation S on item x over a period of q months, using data collected over m months of interviews, calculated using the weights of the ath replicate

Note that an estimate using any one of the first 44 replicate weights uses only part of the expenditure data; in general: ${}_{AK} X_{(S,x)(q,m),1}, \dots, {}_{AK} X_{(S,x)(q,m),44} \neq {}_{WK} X_{(S,x)(q,m)}$

Using standard variance formula, the variance of aggregate expenditures can be estimated as follows:

$$V\left({}_{WK} X_{(S,x)(q,m)}\right) = \frac{1}{44} \sum_{a=1}^{44} \left({}_{AK} X_{(S,x)(q,m),a} - {}_{WK} X_{(S,x)(q,m)} \right)^2$$

Similarly, estimates for the variances of ${}_{WK} \bar{X}_{(S,x)(q,m)}$ can be given as:

$$V({}_{WK} \bar{X}_{(S,x)(q,m)}) = \frac{1}{44} \sum_{a=1}^{44} ({}_{AK} \bar{X}_{(S,x)(q,m),a} - {}_{WK} \bar{X}_{(S,x)(q,m)})^2$$

2. STANDARD ERROR OF THE MEAN

The standard error of the mean, $S.E.(\bar{X})$, is used to obtain confidence intervals that evaluate how close the estimate may be to the true population mean. $S.E.(\bar{X})$ is defined as the square root of the variance of the mean. For example, the weighted calendar period estimated mean expenditure for total food by complete income reporters in 2002 is \$5,224.05. The standard error for this estimate is \$36.49. A 95 percent confidence interval can be constructed around this estimate, bounded by values 1.96 times the standard error less than and greater than the estimate, that is, from \$5,152.53 to \$5,295.57. We could conclude with 95 percent confidence that the true population mean expenditure for food for total complete income reporters in 2002 lies within the interval \$5,152.53 to \$5,295.57.

3. STANDARD ERROR OF THE DIFFERENCE BETWEEN TWO MEANS

Standard errors may also be used to perform hypothesis testing, a procedure that evaluates population parameters using sample estimates. The most common types of hypotheses are: 1) the population parameters are identical, and 2) they are different.

For example, the 2002 mean expenditure estimate for apparel and services for complete income reporters in the \$30,000 to \$39,999 income range is \$1,087.06 and the estimate for complete income reporters in the \$40,000 to \$49,999 income range is \$1,208.67. The apparent difference between the two mean expenditures is \$121.61. The standard error on the estimate of \$1,087.06 is \$48.62 and the estimated standard error for \$1,208.67 is \$41.99.

The standard error of a difference is approximately equal to

$$S.E.({}_{WC} \bar{X}_1, {}_{WC} \bar{X}_2) = \sqrt{V({}_{WC} \bar{X}_1) + V({}_{WC} \bar{X}_2)} \quad (1)$$

where

$$V(\bar{X}_i) = (S.E.(\bar{X}_i))^2$$

This assumes the two sample means, ${}_{WC} \bar{X}_1$ and ${}_{WC} \bar{X}_2$, are disjoint subsets of the population. Hence the standard error of the difference in apparel and services expenditures between these two income groups of complete income reporters is about

$$\sqrt{((48.62)^2 + (41.99)^2)} = 64.24 \quad (2)$$

This means that the 95 percent confidence interval around the difference is from -\$4.30 to \$247.52. Since this interval does include zero, we can conclude with 95 percent confidence that the mean apparel and services expenditures for complete reporters in the \$40,000 to \$49,999 income range

is not different than the mean apparel and services expenditures for complete reporters in the \$30,000 to \$39,999 income range.

Analyses of the difference between two estimates can also be performed on nondisjoint sets of population, where one is a subset of the other. The formula for computing the standard error of the difference between two nondisjoint estimates is

$$S.E.(\bar{X}_1, \bar{X}_2) = \sqrt{(V(\bar{X}_1) + V(\bar{X}_2) - 2r(V(\bar{X}_1) * V(\bar{X}_2)))} \quad (3)$$

where

$$V(\bar{X}_i) = (S.E.(\bar{X}_i))^2$$

and where r is the correlation coefficient between \bar{X}_1 and \bar{X}_2 . The correlation coefficient is generally no greater than 0.2 for CE estimates.

VII. MICRODATA VERIFICATION AND ESTIMATION METHODOLOGY

This section is designed to help users become familiar with the microdata files. The following program gives users a benchmark to verify that their copy of the CD-ROM contains valid data, illustrates the methodology CE uses in producing publication tables, and offers an example of coding to access the data and produce a sample table. The program is written in SAS and shows usage of the SAS data sets available on the SAS CD-ROM. A program written in SAS but utilizing the ASCII data sets is present on the ASCII CD-ROM but will not be referenced here. Refer to the output file on the CD to check output. (Note: CE data published by BLS may not match some values estimated using the microdata due to topcoding of data and CE publication programming methodology.) All variables and ranges referred to in the program are described in detail in Section III.F. DETAILED VARIABLE DESCRIPTIONS in this documentation.

This program produces a table of selected expenditures by income class of the CU. The first section of the program extracts the relevant variables from the FMLY files, while the second section extracts the expenditure and income data from the MTAB and ITAB files. These three data sets are then used along with the ISTUB processing file to construct the sample table output. This output is the product of two SAS arrays. The values in one array are divided by the value in the other array to obtain weighted mean expenditures. The base, or denominator, for the division is a vector consisting of the weighted total population for the U.S. and selected income class categories. The numerator is a matrix of aggregate weighted costs for each line item in the table for the total U.S. population and each income class category.

It should be emphasized that this program has been written solely for the verification of the microdata and as an illustration of the CE estimation methodology. It should not be used for any other purpose.

Note: This program processes large amounts of data. If you are using a PC with limited capabilities it may be necessary to run this program in sections.

A. SAMPLE PROGRAM

NOTE: Copyright (c) 1999 by SAS Institute Inc., Cary, NC, USA.
 NOTE: SAS (r) Proprietary Software Version 8 (TS M0)
 Licensed to BUREAU OF LABOR STATISTICS, Site 0034757167.
 NOTE: This session is executing on the WIN_PRO platform.

NOTE: SAS initialization used:
 real time 3.70 seconds
 cpu time 0.71 seconds

```

1  /*****/
2  /* PROGRAM NAME: CEX INTERVIEW SURVEY SAMPLE PROGRAM (SAS) */
3  /* */
4  /* FUNCTION: CREATE AN INTERVIEW SURVEY EXPENDITURE TABLE BY INCOME CLASS */
5  /* USING MICRODATA FROM THE BUREAU OF LABOR STATISTIC'S CONSUMER */
6  /* EXPENDITURE SURVEY. */
7  /* */
8  /* */
9  /* */
10 /* REASON- */
11 /* ----- */
12 /* IMPROVE EFFICIENCY */
13 /* UPDATE FOR 2002 DATA */
14 /* INCLUDE ROUTINE TO AGGREGATE EASIER */
15 /* */
16 /* FOR SAS VERSION 8 OR HIGHER */
17 /* */
18 /*****/
19
20
21
22 %LET YEAR = 2002; /* DESIGNATE THE CALENDAR YEAR DESIRED */
23
24 %LET YR1 = %SUBSTR(&YEAR,3,2);
25 %LET YR2 = %SUBSTR(%EVAL(&YEAR+1),3,2);
26 LIBNAME I&YR1 "D:\INTRVW&YR1";
NOTE: Libref I02 was successfully assigned as follows:
      Engine: V6
      Physical Name: D:\INTRVW02
27
28
29 /*****/
30 /* STEP1: READ IN THE STUB PARAMETER FILE AND CREATE FORMATS */
31 /* ----- */
32 /* 1 CONVERTS THE STUB PARAMETER FILE INTO A LABEL FILE FOR OUTPUT */
33 /* 2 CONVERTS THE STUB PARAMETER FILE INTO AN EXPENDITURE AGGREGATION FILE */
34 /* 3 CREATES FORMATS FOR USE IN OTHER PROCEDURES */
35 /*****/
36
37
38 DATA STUBFILE (KEEP= COUNT TYPE LEVEL TITLE UCC SURVEY GROUP LINE);
39 INFILE "D:\PROGRAMS\ISTUB&YEAR..TXT"
40 PAD MISSOEVER;
41 INPUT @1 TYPE $1. @ 4 LEVEL $1. @7 TITLE $60. @70 UCC $6.
42 @80 SURVEY $1. @86 GROUP $7.;
43 IF (TYPE = '1');
44 IF GROUP IN ('CUCHARS' 'FOOD' 'EXPEND' 'INCOME');
45
46 RETAIN COUNT 9999;
47 COUNT + 1;
48 LINE = PUT(COUNT, $5.)||LEVEL ;
WARNING: Variable COUNT has already been defined as numeric.
49 /* READS IN THE STUB PARAMETER FILE AND CREATES LINE NUMBERS FOR UCCS */
50 /* A UNIQUE LINE NUMBER IS ASSIGNED TO EACH EXPENDITURE LINE ITEM */
51 RUN;

```

Sets the calendar year as a macro variable that can be used throughout the program.

Reads in the aggregation stub file and dynamically creates numbers associated with each expenditure line item.

Note: This aggregation file can be modified to accommodate any customized aggregation scheme.

One needs only to make sure that the column start positions in the file match the start positions in the input statement.

NOTE: The infile "D:\PROGRAMS\ISTUB2002.TXT" is:
File Name=D:\PROGRAMS\ISTUB2002.TXT,
RECFM=V,LRECL=256

NOTE: 1307 records were read from the infile "D:\PROGRAMS\ISTUB2002.TXT".
The minimum record length was 16.
The maximum record length was 185.

NOTE: The data set WORK.STUBFILE has 696 observations and 8 variables.

NOTE: DATA statement used:
real time 5.17 seconds
cpu time 0.01 seconds

```
52
53
54 DATA AGGFMT1 (KEEP= UCC LINE LINE1-LINE10);
55 SET STUBFILE;
56 LENGTH LINE1-LINE10 $6.;
57 ARRAY LINES(9) LINE1-LINE9;
58 IF (UCC > 'A') THEN
59     LINES(SUBSTR(LINE, 6, 1)) = LINE;
60 RETAIN LINE1-LINE9;
61 IF (UCC < 'A') THEN
62     LINE10 = LINE;
63 IF (LINE10);
64 RUN;
```

NOTE: Character values have been converted to numeric values at the places given by:
(Line):(Column).
59:15 63:7

NOTE: There were 696 observations read from the dataset WORK.STUBFILE.

NOTE: The data set WORK.AGGFMT1 has 566 observations and 12 variables.

NOTE: DATA statement used:
real time 0.04 seconds
cpu time 0.04 seconds

```
65
66
67 PROC SORT DATA= AGGFMT1 (RENAME=(LINE= COMPARE));
68 BY UCC;
69 /* MAPS LINE NUMBERS TO UCCS */
70 RUN;
```

NOTE: There were 566 observations read from the dataset WORK.AGGFMT1.

NOTE: The data set WORK.AGGFMT1 has 566 observations and 12 variables.

NOTE: PROCEDURE SORT used:
real time 0.06 seconds
cpu time 0.01 seconds

```
71
72
73 PROC TRANSPOSE DATA= AGGFMT1 OUT= AGGFMT2 (RENAME=(COL1= LINE));
74 BY UCC COMPARE;
75 VAR LINE1-LINE10;
76 RUN;
```

NOTE: There were 566 observations read from the dataset WORK.AGGFMT1.

NOTE: The data set WORK.AGGFMT2 has 5660 observations and 4 variables.

NOTE: PROCEDURE TRANSPOSE used:
real time 0.06 seconds
cpu time 0.01 seconds

```
77
78
79 DATA AGGFMT (KEEP= UCC LINE);
80 SET AGGFMT2;
81 IF LINE;
82 IF SUBSTR(COMPARE, 6, 1) > SUBSTR(LINE, 6, 1) OR COMPARE=LINE;
```

Subsequent program steps
manipulate the aggregation stub file
into a dataset that associates UCCs
with line numbers.

```

83      /* AGGREGATION FILE. EXTRANEIOUS MAPPINGS ARE DELETED          */
84      /* PROC SQL WILL AGGANGE LINE#/UCC PAIRS FOR USE IN PROC FORMAT */
85      RUN;

NOTE: Character values have been converted to numeric values at the places given by:
      (Line):(Column).
      81:8
NOTE: There were 5660 observations read from the dataset WORK.AGGFMT2.
NOTE: The data set WORK.AGGFMT has 2692 observations and 2 variables.
NOTE: DATA statement used:
      real time          0.03 seconds
      cpu time           0.03 seconds

86
87
88      PROC SQL NOPRINT;
89          SELECT UCC, LINE, COUNT(*)
90              INTO :UCCS SEPARATED BY " ",
91                  :LINES SEPARATED BY " ",
92                  :CNT
93              FROM AGGFMT;
NOTE: The query requires remerging summary statistics back with the original data.
94      QUIT;
NOTE: PROCEDURE SQL used:
      real time          0.25 seconds
      cpu time           0.03 seconds

95      RUN;
96
97
98      %MACRO MAPPING;
99          %DO I = 1 %TO &CNT;
100         "%SCAN(&UCCS,&I,%STR( ))" = "%SCAN(&LINES,&I,%STR( ))"
101         %END;
102      %MEND MAPPING;
103
104
105      DATA LBLFMT (RENAME=(LINE= START TITLE= LABEL));
106          SET STUBFILE (KEEP= LINE TITLE);
107          RETAIN FMTNAME 'LBLFMT' TYPE 'C';
108          /* LABEL FILE. LINE NUMBERS ARE ASSIGNED A TEXT LABEL */
109          /* DATASET CONSTRUCTED TO BE READ INTO A PROC FORMAT */
110      RUN;

NOTE: There were 696 observations read from the dataset WORK.STUBFILE.
NOTE: The data set WORK.LBLFMT has 696 observations and 4 variables.
NOTE: DATA statement used:
      real time          0.01 seconds
      cpu time           0.01 seconds

111
112
113      PROC FORMAT;
114
115          VALUE $AGGFMT (MULTILABEL)
116              %MAPPING
117              OTHER= 'OTHER';
NOTE: Format $AGGFMT has been output.
118          /* CREATE AGGREGATION FORMAT */
119
120
121          VALUE $INC (MULTILABEL)
122              '01' = '01'
123              '01' = '11'
124              '02' = '02'
125              '02' = '11'
126              '03' = '03'
127              '03' = '11'

```

Creates a Dataset that can be used to associate titles with line numbers with a format procedure.

Formats:

Puts the aggregation scheme into a SAS format.

Puts the income groupings into a SAS format.

Note: The multilabel option is

```

128 '04' = '04'
129 '04' = '11'
130 '05' = '05'
131 '05' = '11'
132 '06' = '06'
133 '06' = '11'
134 '07' = '07'
135 '07' = '11'
136 '08' = '08'
137 '08' = '11'
138 '09' = '09'
139 '09' = '11'
140 '10' = '10';
NOTE: Format $INC has been output.
141 /* CREATE INCOME CLASS FORMAT */
142 RUN;

NOTE: PROCEDURE FORMAT used:
      real time          21.29 seconds
      cpu time           21.03 seconds

143
144
145 PROC FORMAT LIBRARY= WORK CNTLIN= LBLFMT;
NOTE: Format $LBLFMT has been output.
146 /* CREATE LABEL FILE FORMATS */
147 RUN;

NOTE: PROCEDURE FORMAT used:
      real time          0.01 seconds
      cpu time           0.00 seconds

NOTE: There were 696 observations read from the dataset WORK.LBLFMT.

148
149
150 /*****
151 /* STEP2: READ IN ALL NEEDED DATA FROM THE CD-ROM */
152 /* ----- */
153 /* 1 READ IN THE INTERVIEW FMLY FILES & CREATE THE MO_SCOPE VARIABLE */
154 /* 2 READ IN THE INTERVIEW MTAB AND ITAB FILES */
155 /* 3 MERGE FMLY AND EXPENDITURE FILES TO DERIVE WEIGHTED EXPENDITURES */
156 /*****
157
158
159 DATA FMLY (KEEP = NEWID INCLASS WTREP01-WTREP44 FINLWT21 REPWT1-REPWT45);
160
161 SET I&YR1..FMLI&YR1.1X (IN = FIRSTQTR)
162     I&YR1..FMLI&YR1.2
163     I&YR1..FMLI&YR1.3
164     I&YR1..FMLI&YR1.4
165     I&YR1..FMLI&YR2.1 (IN = LASTQTR);
166 BY NEWID;
167 /* READ IN FMLY FILE DATA */
168
169 IF FIRSTQTR THEN
170     MO_SCOPE = (QINTRVMO - 1);
171 ELSE IF LASTQTR THEN
172     MO_SCOPE = (4 - QINTRVMO);
173 ELSE
174     MO_SCOPE = 3;
175 /* CREATE MONTH IN SCOPE VARIABLE (MO_SCOPE) */
176
177 ARRAY REPS_A(45) WTREP01-WTREP44 FINLWT21;
178 ARRAY REPS_B(45) REPWT1-REPWT45;
179
180 DO i = 1 TO 45;
181     IF REPS_A(i) > 0 THEN
182         REPS_B(i) = (REPS_A(i) * MO_SCOPE / 12);
183     ELSE REPS_B(i) = 0;

```

necessary in the aggregation format and income format since multiple mappings occur. This option is available in SAS V8 or higher.

Puts the titles into a SAS format for use in the final output.

Reads in the necessary variables from the fmly files. Newid is the code given to a consumer unit each time it participates. Finlwt21 and Wtrep01-Wtrep44 are weight variables used to weight each consumer unit such that it represents some portion of the population. Inclass is a code that represents the range within which the consumer unit's annual income falls.

Lines 169-174 create the variable mo_scope. Mo_scope is used to calculate calendar year, as opposed to collection year, estimates. It is used in conjunction with weights to determine populations. NOTE: More information on mo_scope can be found in the ESTIMATION PROCEDURES section of this documentation.

```

184     END;
185     /* ADJUST WEIGHTS BY MO_SCOPE TO ACCOUNT FOR SAMPLE ROTATION */
186 RUN;

```

NOTE: Character values have been converted to numeric values at the places given by:
(Line):(Column).

```
170:19  172:23
```

```

NOTE: There were 7691 observations read from the dataset I02.FMLI021X.
NOTE: There were 7778 observations read from the dataset I02.FMLI022.
NOTE: There were 7833 observations read from the dataset I02.FMLI023.
NOTE: There were 8024 observations read from the dataset I02.FMLI024.
NOTE: There were 8086 observations read from the dataset I02.FMLI031.
NOTE: The data set WORK.FMLY has 39412 observations and 92 variables.
NOTE: DATA statement used:
      real time          1:29.88
      cpu time           2.46 seconds

```

```

187
188
189
190 DATA EXPEND (KEEP=NEWID UCC COST);
191
192     SET I&YR1..MTBI&YR1.1X
193         I&YR1..MTBI&YR1.2
194         I&YR1..MTBI&YR1.3
195         I&YR1..MTBI&YR1.4
196         I&YR1..MTBI&YR2.1
197
198         I&YR1..ITBI&YR1.1X (RENAME=(VALUE=COST))
199         I&YR1..ITBI&YR1.2 (RENAME=(VALUE=COST))
200         I&YR1..ITBI&YR1.3 (RENAME=(VALUE=COST))
201         I&YR1..ITBI&YR1.4 (RENAME=(VALUE=COST))
202         I&YR1..ITBI&YR2.1 (RENAME=(VALUE=COST));
203     BY NEWID;
204
205     IF REFYR = "&YEAR" OR REF_YR = "&YEAR";
206     IF UCC = '710110' THEN
207         COST = (COST * 4);
208     /* READ IN MTAB AND ITAB EXPENDITURE AND INCOME DATA */
209     /* ADJUST UCC 710110 TO ANNUALIZE */
210 RUN;

```

```

NOTE: There were 716727 observations read from the dataset I02.MTBI021X.
NOTE: There were 685144 observations read from the dataset I02.MTBI022.
NOTE: There were 703842 observations read from the dataset I02.MTBI023.
NOTE: There were 710899 observations read from the dataset I02.MTBI024.
NOTE: There were 735461 observations read from the dataset I02.MTBI031.
NOTE: There were 391254 observations read from the dataset I02.ITBI021X.
NOTE: There were 395265 observations read from the dataset I02.ITBI022.
NOTE: There were 398346 observations read from the dataset I02.ITBI023.
NOTE: There were 405954 observations read from the dataset I02.ITBI024.
NOTE: There were 406296 observations read from the dataset I02.ITBI031.
NOTE: The data set WORK.EXPEND has 4427448 observations and 3 variables.
NOTE: DATA statement used:
      real time          6:43.98
      cpu time           7.67 seconds

```

```

211
212
213
214 DATA PUBFILE (KEEP = NEWID INCLASS UCC RCOST1-RCOST45);
215
216     MERGE FMLY      (IN = INFAM)
217         EXPEND (IN = INEXP);
218     BY NEWID;
219     IF INEXP AND INFAM;
220
221     IF COST = . THEN
222         COST = 0;

```

Lines 177-184 create weights that are mo_scope adjusted to account for sample rotation.

Reads in all MTAB expenditure data and ITAB income data.

Newid is the consumer unit code. UCC is a code that represents the type of expenditure variable. Cost is the value that corresponds to the UCC code.

Refyr and Ref_yr are the reference year of the expenditure. These are set such that any expenditure outside of the desired reference year is excluded.

UCC 710110 must be adjusted because only one-fourth of all consumer units interviewed in a quarter are asked this question (those in the 5th interview).

Merges the FMLY and EXPEND data sets together and changes missing cost values to zero.

```

223
224     ARRAY REPS_A(45) WTREP01-WTREP44 FINLWT21;
225     ARRAY REPS_B(45) RCOST1-RCOST45;
226
227     DO i = 1 TO 45;
228         IF REPS_A(i) > 0
229             THEN REPS_B(i) = (REPS_A(i) * COST);
230             ELSE REPS_B(i) = 0;
231     END;
232     /* MERGE FMLY FILE WEIGHTS AND CHARACTERISTICS WITH MTAB/ITAB COSTS */
233     /* MULTIPLY COSTS BY WEIGHTS TO DERIVE WEIGHTED COSTS */
234 RUN;

```

NOTE: There were 39412 observations read from the dataset WORK.FMLY.
NOTE: There were 4427448 observations read from the dataset WORK.EXPEND.
NOTE: The data set WORK.PUBFILE has 4427448 observations and 48 variables.
NOTE: DATA statement used:

```

real time      2:28.76
cpu time       2:06.99

```

```

235
236
237 /******
238 /* STEP3: CALCULATE POPULATIONS */
239 /* -----
240 /* 1 SUM ALL 45 WEIGHT VARIABLES TO DERIVE REPLICATE POPULATIONS */
241 /* 2 FORMAT FOR CORRECT COLUMN CLASSIFICATIONS */
242 /* 3 ARRANGE DATA FOR MERGING WITH EXPENDITURES */
243 /******
244
245

```

```

246 PROC SUMMARY NWAY DATA=FMLY;
247     CLASS INCLASS / MLF;
248     VAR REPWT1-REPWT45;
249     FORMAT INCLASS $INC.;
250     OUTPUT OUT = POP1 SUM = RPOP1-RPOP45;
251     /* SUMS WEIGHTS TO CREATE POPULATIONS PER REPLICATE */
252     /* FORMATS ROWS TO CORRECT COLUMN CLASSIFICATIONS */
253     /* ROWS = CLASS, COLUMNS = REPLICATES */
254 RUN;

```

NOTE: There were 39412 observations read from the dataset WORK.FMLY.
NOTE: The data set WORK.POP1 has 11 observations and 48 variables.
NOTE: PROCEDURE SUMMARY used:

```

real time      1.51 seconds
cpu time       0.35 seconds

```

```

255
256
257 PROC TRANSPOSE DATA = POP1
258     OUT = POP2 PREFIX = POP;
259     VAR RPOP1-RPOP45;
260     /* PUTS POPULATIONS INTO 2 DIM FORMAT FOR MERGING */
261     /* ROWS = REPLICATES, COLUMNS = CLASS */
262 RUN;

```

NOTE: There were 11 observations read from the dataset WORK.POP1.
NOTE: The data set WORK.POP2 has 45 observations and 12 variables.
NOTE: PROCEDURE TRANSPOSE used:

```

real time      0.01 seconds
cpu time       0.01 seconds

```

```

263
264
265 DATA POP (KEEP = REP POP1-POP11)
266     CUS (RENAME = (POP1=GROUP1 POP2=GROUP2 POP3=GROUP3 POP4=GROUP4 POP5=GROUP5
267                 POP6=GROUP6 POP7=GROUP7 POP8=GROUP8 POP9=GROUP9
268                 POP10=GROUP10 POP11=GROUP11) DROP = _NAME_ _REP_);

```

Weights the cost values by the 44 replicate weights and full sample weights. RCOST1-RCOST45 represents the weighted costs for each expenditure.

The weights in the FMLY file are summed to create replicate populations and the full US population. This is done for each income class through the income format.

Replicate populations (Repwt1-Repwt44) and the US population (Repwt45) are used as the denominator in means estimation.

All populations are put into dataset POP. A special dataset, CUS, is created specifically for inserting the full US population into the output.

```

269 SET POP2;
270 REP + 1;
271 LINE = '100001';
272
273 OUTPUT POP;
274 IF REP = 45 THEN OUTPUT CUS;
275 /* CREATES REP VARIABLE FOR MERGING WITH EXPENDITURES */
276 /* SETS ASIDE THE 45TH REPLICATE POPULATIONS FOR INSERTION INTO TABLE */
277 RUN;

```

```

NOTE: There were 45 observations read from the dataset WORK.POP2.
NOTE: The data set WORK.POP has 45 observations and 12 variables.
NOTE: The data set WORK.CUS has 1 observations and 12 variables.
NOTE: DATA statement used:
      real time          0.06 seconds
      cpu time           0.00 seconds

```

```

278
279
280 /*****
281 /* STEP4: CALCULATE WEIGHTED AGGREGATE EXPENDITURES */
282 /* ----- */
283 /* 1 SUM THE 45 REPLICATE WEIGHTED EXPENDITURES TO DERIVE AGGREGATES */
284 /* 2 FORMAT FOR CORRECT COLUMN CLASSIFICATIONS AND AGGREGATION SCHEME */
285 /* 3 ARRANGE DATA FOR MERGING WITH POPULATIONS */
286 /*****
287
288
289 PROC SUMMARY NWAY DATA=PUBFILE SUMSIZE=MAX COMPLETETYPES;
290 CLASS UCC INCLASS / MLF;
291 VAR RCOST1-RCOST45;
292 FORMAT UCC $AGGFMT. INCLASS $INC.;
293 OUTPUT OUT=AGG1 (DROP= _TYPE_ _FREQ_ RENAME=(UCC=LINE))
294 SUM = RCOST1-RCOST45;
295 /* SUMS WEIGHTED COSTS PER REPLICATE TO GET AGGREGATES */
296 /* SUMS COLUMNS TO CREATE COMPLETE REPORTING COLUMN */
297 /* ROWS = UCC*CLASS, COLUMNS = REPLICATES */
298 RUN;

```

```

NOTE: There were 4427448 observations read from the dataset WORK.PUBFILE.
NOTE: The data set WORK.AGG1 has 7381 observations and 47 variables.
NOTE: PROCEDURE SUMMARY used:
      real time          2:09.40
      cpu time           1:54.12

```

```

299
300
301 /* PROC SUMMARY WILL NOT OUTPUT MISSINGS FOR LINES THAT */
302 /* HAVE NO OBSERVATIONS FOR ANY INCLASS, SO A STUB CONTAINING */
303 /* EVERY COMBINATION OF INCLASS AND LINE MUST BE GENERATED */
304 /* AND MERGED WITH THE SUMS TO PROVIDE ROWS OF MISSINGS. */
305
306
307 /* GENERATE A DATASET CONTAINING EACH UNIQUE LINE ONLY ONCE */
308 PROC SORT DATA = AGGFMT OUT = AGG_STUB NODUPKEYS;
309 BY LINE;
310 RUN;

```

```

NOTE: 2000 observations with duplicate key values were deleted.
NOTE: There were 2692 observations read from the dataset WORK.AGGFMT.
NOTE: The data set WORK.AGG_STUB has 692 observations and 2 variables.
NOTE: PROCEDURE SORT used:
      real time          0.10 seconds
      cpu time           0.00 seconds

```

```

311
312

```

Weighted costs are summed and formatted into income classes and by the aggregation scheme of the stub file. These aggregate expenditures will become the numerator in means estimation.


```

313 /* GENERATE EVERY COMBINATION OF INCLASS AND LINE */
314 DATA AGG_STUB (KEEP = LINE INCLASS);
315 SET AGG_STUB;
316 ATTRIB INCLASS FORMAT=$CHAR2.;
317 DO i = 1 TO 11;
318     INCLASS = i;
319     IF INCLASS <= ' 9' THEN INCLASS = '0' || SUBSTR(INCLASS,2,1);
320     ELSE INCLASS = INCLASS;
321     OUTPUT;
322 END;
323 RUN;

```

NOTE: Numeric values have been converted to character values at the places given by:
(Line):(Column).

318:17

NOTE: There were 692 observations read from the dataset WORK.AGG_STUB.
NOTE: The data set WORK.AGG_STUB has 7612 observations and 2 variables.

NOTE: DATA statement used:
real time 0.01 seconds
cpu time 0.00 seconds

```

324
325
326 /* MERGE STUB AND SUMMARY DATASETS TO PRODUCE COMPLETE SUMMATION */
327 DATA AGG1;
328     MERGE AGG1
329           AGG_STUB;
330     BY LINE INCLASS;
331 RUN;

```

NOTE: There were 7381 observations read from the dataset WORK.AGG1.
NOTE: There were 7612 observations read from the dataset WORK.AGG_STUB.
NOTE: The data set WORK.AGG1 has 7623 observations and 47 variables.

NOTE: DATA statement used:
real time 0.04 seconds
cpu time 0.04 seconds

```

332
333
334 PROC TRANSPOSE DATA=AGG1
335     OUT=AGG2 (DROP = _NAME_) PREFIX = AGG;
336 BY LINE;
337 WHERE LINE NE 'OTHER';
338 VAR RCOST1-RCOST45;
339 /* TRANSPOSES TO PUT AGGREGATED COSTS IN 2 DIM FORMAT */
340 /* ROWS = REPLICATES, COLUMNS = CLASS */
341 RUN;

```

NOTE: There were 7612 observations read from the dataset WORK.AGG1.
WHERE LINE not = 'OTHER';

NOTE: The data set WORK.AGG2 has 31140 observations and 12 variables.
NOTE: PROCEDURE TRANSPOSE used:

real time 0.10 seconds
cpu time 0.07 seconds

```

342
343
344
345 DATA AGG;
346 SET AGG2;
347 BY LINE;
348
349 RETAIN REP 0;
350 IF FIRST.LINE THEN
351     DO;
352         REP = 0;
353     END;
354

```

```

355  ARRAY AGGS(11) AGG1-AGG11;
356  DO i = 1 TO 11;
357  IF AGGS(i) = .
358  THEN AGGS(i) = 0;
359  END;
360  REP + 1;
361  /* CREATES VARIABLES TO USE LATER IN MERGES */
362  /* SETS MISSING AGGREGATED COSTS TO ZERO */
363  RUN;

```

NOTE: There were 31140 observations read from the dataset WORK.AGG2.
NOTE: The data set WORK.AGG has 31140 observations and 14 variables.
NOTE: DATA statement used:
real time 0.14 seconds
cpu time 0.12 seconds

```

364
365
366  PROC SORT DATA=AGG;
367  BY REP LINE;
368  RUN;

```

NOTE: There were 31140 observations read from the dataset WORK.AGG.
NOTE: The data set WORK.AGG has 31140 observations and 14 variables.
NOTE: PROCEDURE SORT used:
real time 0.12 seconds
cpu time 0.12 seconds

```

369
370
371  /*****
372  /* STEP5: CALCULATE MEAN EXPENDITURES AND STANDARD ERRORS */
373  /* ----- */
374  /* 1 MERGE POPULATIONS WITH AGGREGATE EXPENDITURES AND CALCULATE MEANS */
375  /* 2 CALCULATE STANDARD ERRORS */
376  *****/
377
378
379  DATA ALL (KEEP = LINE REP GRP1-GRP11);
380  MERGE POP AGG;
381  BY REP;
382
383  ARRAY AGGS(11) AGG1-AGG11;
384  ARRAY POPS(11) POP1-POP11;
385  ARRAY MEANS(11) GRP1-GRP11;
386
387  DO i = 1 TO 11;
388  MEANS(i) = AGGS(i) / POPS(i);
389  END;
390  /* MERGES POPS AND AGGREGATED COSTS TOGETHER */
391  /* CALCULATES MEAN EXPENDITURES */
392  /* ROWS = LINE*REPLICATE MEANS, COLUMN = CLASS */
393  RUN;

```

NOTE: There were 45 observations read from the dataset WORK.POP.
NOTE: There were 31140 observations read from the dataset WORK.AGG.
NOTE: The data set WORK.ALL has 31140 observations and 13 variables.
NOTE: DATA statement used:
real time 0.78 seconds
cpu time 0.24 seconds

```

394
395
396  PROC SORT DATA=ALL;
397  BY LINE REP;
398  RUN;

```

NOTE: There were 31140 observations read from the dataset WORK.ALL.

The aggregate expenditures are divided by populations to form means. This is done per each replicate and for the full sample.

NOTE: The data set WORK.ALL has 31140 observations and 13 variables.

NOTE: PROCEDURE SORT used:

real time 0.15 seconds
cpu time 0.12 seconds

```
399
400
401 PROC TRANSPOSE DATA=ALL (DROP=REP)
402   OUT = TAB1 PREFIX = MEAN;
403   BY LINE;
404   /* TRANSPOSES TO PUT REPLICATE MEANS INTO ONE LINE */
405   /* ROWS = LINE*CLASS, COLUMNS = REPLICATE MEANS */
406 RUN;
```

NOTE: There were 31140 observations read from the dataset WORK.ALL.

NOTE: The data set WORK.TAB1 has 7612 observations and 47 variables.

NOTE: PROCEDURE TRANSPOSE used:

real time 0.06 seconds
cpu time 0.06 seconds

```
407
408
409 DATA TAB2 (DROP = _NAME_ i);
410   SET TAB1;
411
412   ARRAY REPS(44) MEAN1-MEAN44;
413   ARRAY DIFF(44) DIFF1-DIFF44;
414
415   DO i = 1 TO 44;
416     DIFF(i) = (REPS(i) - MEAN45)**2;
417   END;
418
419   MEAN = MEAN45;
420   SE = SQRT((1/44)*SUM(OF DIFF(*)));
421   /* CALCULATES STANDARD ERRORS */
422 RUN;
```

NOTE: There were 7612 observations read from the dataset WORK.TAB1.

NOTE: The data set WORK.TAB2 has 7612 observations and 92 variables.

NOTE: DATA statement used:

real time 0.37 seconds
cpu time 0.32 seconds

```
423
424
425 /*****
426 /* STEP6: TABULATE MEAN EXPENDITURES AND STANDARD ERRORS */
427 /* ----- */
428 /* 1 ARRANGE THE DATA INTO A FORM SUITABLE FOR TABULATION */
429 /* 2 TABULATE */
430 /*****
```

```
431
432
433 PROC TRANSPOSE DATA=TAB2 OUT=TAB3 (RENAME=( _NAME_ =ESTIMATE)) PREFIX = GROUP;
434   BY LINE;
435   VAR MEAN SE;
436   /* TRANSPOSES MEANS BACK INTO COLUMN FORMAT */
437   /* ROWS = LINE, COLUMNS = CLASS, VAR = MEAN AND SE */
438 RUN;
```

NOTE: There were 7612 observations read from the dataset WORK.TAB2.

NOTE: The data set WORK.TAB3 has 1384 observations and 13 variables.

NOTE: PROCEDURE TRANSPOSE used:

real time 0.03 seconds
cpu time 0.03 seconds

439

The replicated means are put into the standard error estimator to calculate standard error of the mean.

Arrange output for tabulation.

```

440
441 DATA TAB;
442   SET TAB3 CUS;
443   BY LINE;
444   IF LINE = '100001' THEN ESTIMATE = 'N';
445 RUN;

```

```

NOTE: There were 1384 observations read from the dataset WORK.TAB3.
NOTE: There were 1 observations read from the dataset WORK.CUS.
NOTE: The data set WORK.TAB has 1385 observations and 13 variables.
NOTE: DATA statement used:
      real time          0.01 seconds
      cpu time           0.01 seconds

```

```

446
447
448 PROC TABULATE DATA=TAB;
449   CLASS LINE / GROUPINTERNAL ORDER=DATA;
450   CLASS ESTIMATE;
451   VAR GROUP1-GROUP11;
452   FORMAT LINE $LBLEFMT.;
453   /* TABULATES MEANS AND SE                               */
454   /* CONDITIONAL MACRO EXECUTION FOR COLUMN TITLES */
455
456   TABLE (LINE * ESTIMATE), (GROUP11 GROUP1 GROUP2 GROUP3 GROUP4
457                               GROUP5 GROUP6 GROUP7 GROUP8 GROUP9)
458   *SUM='' / RTS=25;
459   LABEL ESTIMATE=ESTIMATE GROUP1='LESS THAN $5,000'
460                               GROUP2='$5,000 TO $9,999'
461                               GROUP3='$10,000 TO $14,999'
462                               GROUP4='$15,000 TO $19,999'
463                               GROUP5='$20,000 TO $29,999'
464                               GROUP6='$30,000 TO $39,999'
465                               GROUP7='$40,000 TO $49,999'
466                               GROUP8='$50,000 TO $69,999'
467                               GROUP9='$70,000 AND OVER'
468                               GROUP11='TOTAL COMPLETE REPORTING';
469   OPTIONS NODATE NOCENTER NONUMBER LS=167;
470   TITLE "INTERVIEW EXPENDITURES FOR INCOME BEFORE TAXES";
471 RUN;

```

```

NOTE: There were 1385 observations read from the dataset WORK.TAB.
NOTE: PROCEDURE TABULATE used:
      real time          0.20 seconds
      cpu time           0.09 seconds

```

Population totals per income class are inserted into the output.

Tabulate the data. Line numbers are formatted to give titles.

B. OUTPUT

Sample program output is stored as a separate file in the Programs folder on the CD.

VIII. DESCRIPTION OF THE SURVEY

The CE program consists of two separate components, each with its own questionnaire and independent sample:

1) An Interview panel survey in which each CU in the sample is interviewed once every 3 months over five consecutive quarters to obtain a year's worth of data. New panels are initiated every month of the year.

2) A Diary or recordkeeping survey completed by the sample CUs for two consecutive 1-week periods; the sample is surveyed across a 12-month period.

Data are collected by the Bureau of the Census under contract with BLS. All data collected in both surveys are subject to Bureau of the Census confidentiality requirements, which prevent the disclosure of any CU member's identity.

The quarterly Interview survey is designed to collect data on major items of expense which respondents can be expected to recall for 3 months or longer. In practice, the Interview survey collects detailed data on an estimated 60 to 70 percent of total household expenditures. In addition, global estimates are obtained for food and other selected items. These global estimates account for an additional 20 to 25 percent of total expenditures. The Interview survey does not collect expenses for housekeeping supplies, personal care products, and nonprescription drugs, which contribute about 5 to 15 percent of total expenditures. Thus, up to 95 percent of total expenditures are covered in the Interview survey. Household characteristics, income, and financial data are also collected. At BLS, each quarter of data is processed independently from other quarters. Thus the annual estimates published by BLS are not dependent on the participation of a CU for the full five interviews.

The initial interview collects demographic and family characteristics data on a Control Card. These pertain to age, sex, race, marital status, education, and CU relationship for each CU member. This information is updated at each subsequent interview. Expenditures are for the month prior to the interview. They are used along with the inventory information for bounding purposes solely, that is, to prevent the reporting of expenditures from an indefinite past period. Expenditure data from the first interview are not on these files since they are not included in expenditure estimation.

The second through fifth interviews use uniform questionnaires to collect expenditure information from the previous three months. Income information, such as wage, salary, unemployment compensation, child support, and alimony, as well as information on the employment of each CU member age 14 and over, are collected in the second and fifth interviews only.

Income data and employment information collected in the second interview are carried over to the third and fourth interviews. For new CU members and CU members who started work since the previous interview, wage, salary, and other information on employment are collected in the third and fourth interviews. In the fifth interview, a supplement is used to collect information on asset values and changes in balances of assets and liabilities. These data, along with other household characteristics information, permit users to classify sample units for research purposes and allow BLS to adjust population weights for CUs who do not cooperate in the survey.

Each quarter, 20 percent of the sample are new households introduced for the first time. They replace one-fifth of the sample that completed its final interview in the previous quarter. This rotating

procedure with overlap is designed to provide more efficient data collection. CUs that move away from their sample address between interviews are dropped from the survey. New CUs that move into the sample address are screened for eligibility and included in the survey. Students living in college- or university-regulated housing report their own expenditures directly, while at school, rather than being considered part of their parents' household.

IX. DATA COLLECTION AND PROCESSING

In addition to its data collection duties, the Bureau of the Census is responsible for field editing and coding, consistency checking, quality control, and data transmittal to BLS. BLS performs additional review and editing procedures in preparing the data for publication and release.

A. BUREAU OF THE CENSUS ACTIVITIES

Data collection activities have been conducted by the Census Bureau on a continuing basis since October 1979. Due to differences in format and design, the Interview survey and the Diary survey data are collected and processed separately. Preliminary Interview survey data processing carried out by the Census Bureau includes keying the data from the questionnaires, clerical data editing, and correcting for inconsistencies in the collected data.

Upon completion by the interviewers, the Interview questionnaires are sent from the regional offices to the Census National Processing Center (NPC) in Jeffersonville, IN. At the NPC, codes are applied to identify demographic characteristics, expenditures, income and assets, and other items such as make and model of automobile and trip destination. Also, missing sections of questionnaires, inconsistencies, and errors are identified and corrected. Prior to microfilming and storage, selected entries from these questionnaires are transcribed to the next quarter's questionnaires to prevent the recording of duplicate reports by respondents. This information is then returned to the regional offices for use by field representatives in subsequent interviews.

After clerical processing at the NPC, the data are transmitted to the Census Processing Center in Suitland, MD, where they pass through basic quality checks of control counts, missing values, etc. The data are then electronically transmitted to BLS in Washington, DC.

B. BUREAU OF LABOR STATISTICS ACTIVITIES

Upon receipt from the Bureau of the Census, the data undergo a series of computer edits that identify and correct irregularities and inconsistencies. Other adjustments eliminate business and reimbursed expenses, apply appropriate sales taxes, and derive CU weights based on BLS specifications. In addition, demographic and work experience items (except income) are imputed when missing or invalid. All data changes and imputations are identified with flags on the Interview data base.

Next, BLS conducts an extensive review to ensure that severe data aberrations are corrected. The review takes place in several stages: a review of counts, weighted means, and unweighted means by region; a review of family relationship coding inconsistencies; a review of selected extreme values for expenditure and income categories; and a verification of the various data transformations.

Cases of extreme data values are investigated by reviewing questionnaires on microfilm. Errors discovered through this procedure are corrected prior to release of the data.

Two major types of data adjustment routines--imputation and allocation--are carried out to classify expenditures and improve estimates. Data imputation routines correct for missing or invalid entries. All fields except income and assets are subject to imputation. Allocation routines are applied when respondents provide insufficient expenditure detail to meet tabulation requirements. For example, reports of combined expenditures for fuels and utilities are allocated among gas, electricity, and other items in this group. While not strictly an allocation routine, another adjustment separates mortgage and vehicle loan payments into principal and interest components using associated data on the interest rate and term of the loan. Another adjustment is done to prepare the data for the production of calendar year estimates. Time adjustment routines are used to classify expenditures by month. Aggregation can then be done at a monthly level, permitting the production of monthly, quarterly, annual, and other interval estimates. To analyze the effects of these adjustments, tabulations are made before and after the data adjustments. At this point, processing activities are completed and the database is ready for use.

X. SAMPLING STATEMENT

A. SURVEY SAMPLE DESIGN

Samples for the CE are national probability samples of households designed to be representative of the total U. S. civilian population. Eligible population includes all civilian noninstitutional persons.

The first step in sampling is the selection of primary sampling units (PSUs), which consist of counties (or parts thereof) or groups of counties. The set of sample PSUs used for the 2002 and 2003 samples is composed of 105 areas. The design classifies the PSUs into four categories:

- 31 "A" certainty PSUs are Metropolitan Statistical Areas (MSA's) with a population greater than 1.5 million.
- 46 "B" PSUs, are medium-sized MSA's.
- 10 "C" PSUs are nonmetropolitan areas that are included in the CPI.
- 18 "D" PSUs are nonmetropolitan areas where only the urban population data will be included in the CPI.

The sampling frame (that is, the list from which housing units were chosen) for the 2002 and 2003 surveys is generated from the 1990 Census of Population 100-percent-detail file. The sampling frame is augmented by new construction permits and by techniques used to eliminate recognized deficiencies in census coverage. All Enumeration Districts (EDs) from the Census that fail to meet the criterion for good addresses for new construction, and all EDs in nonpermit-issuing areas are grouped into the area segment frame. Interviewers are then assigned to list these areas before a sample is drawn.

To the extent possible, an unclustered sample of units is selected within each PSU. This lack of clustering is desirable because the sample size of the Diary Survey is small relative to other surveys, while the intraclass correlations for expenditure characteristics are relatively large. This suggests that any clustering of the sample units could result in an unacceptable increase in the within-PSU variance and, as a result, the total variance.

The Interview Survey is a panel rotation survey. Each panel is interviewed for five consecutive quarters and then dropped from the survey. As one panel leaves the survey, a new panel is introduced. Approximately 20 percent of the addresses are new to the survey each month.

B. COOPERATION LEVELS

The Interview Survey is a rotating panel survey in which approximately 11,000 sample units are contacted each calendar quarter. Allowing for bounding interviews and nonresponse (including vacancies), the number of participating sample units per quarter is targeted at approximately 7,800. Information on 2002 interview participation follows.

The response rate for the 2002 Interview Survey is 78% as shown below

| Consumer units designated for the survey | Type B or C ineligible cases | <i>Eligible housing unit interviews</i> | | |
|--|---------------------------------|---|-----------------------|--------------------------------|
| | | Number of potential interviews | Type A nonresponse | Total respondent interviews |
| 49,501 | 9,336 | 40,165 | 8,838 | 31,327 |

Type B or C cases are housing units that are vacant, nonexistent, or ineligible for interview. Type A nonresponses are housing units that the interviewers were unable to contact or the respondents refused to participate in the survey. The response rate stated above is based only on the eligible housing units (i.e., the designated sample cases less Type B and Type C ineligible cases).

C. WEIGHTING

Each CU included in the CE represents a given number of CUs in the U.S. population, which is considered to be the universe. The translation of sample families into the universe of families is known as weighting. However, since the unit of analysis for the CE is a CU, the weighting is performed at the CU level. Several factors are involved in determining the weight for each CU for which an interview is obtained. There are four steps in the weighting procedure:

- 1) The basic weight is assigned to an address and is the inverse of the probability of selection of the housing unit.
- 2) A weight control factor is applied to each interview if subsampling is performed in the field.
- 3) A noninterview adjustment is made for units where data could not be collected from occupied housing units. The adjustment is performed as a function of region, housing tenure, family size and race.
- 4) A final adjustment is performed to adjust the sample estimates to national population controls derived from the Current Population Survey. The adjustments are made based on both the CU's member composition and the CU as a whole. The weight for the CU is adjusted for individuals within the CU to meet the controls for 14 age/race categories, 4 regions, and 4 region/urban categories. The CU weight is also adjusted to meet the control for total number of CUs and total number of CUs who own their living quarters. The weighting procedure uses an iterative process to ensure that the sample estimates meet all the population controls.

NOTE: The weight for a consumer unit (CU) can be different for each quarter in which the CU participates in the survey, as the CU may represent a different number of CUs with similar characteristics.

D. STATE IDENTIFIER

Since the CE is not designed to produce state-level estimates, summing the CU weights by state will not yield state population totals. A CU's basic weight reflects its probability of selection among a group of primary sampling units of similar characteristics. For example, sample units in an urban nonmetropolitan area in California may represent similar areas in Wyoming and Nevada. Among other adjustments, CUs are post-stratified nationally by sex-age-race. For example, the weights of CUs containing a black male, age 16-24 in Alabama, Colorado, or New York, are all adjusted equivalently. Therefore, weighted population state totals will not match population totals calculated from other surveys that are designed to represent state data.

To summarize, the CE sample was not designed to produce precise estimates for individual states. Although state-level estimates that are unbiased in a repeated sampling sense can be calculated for various statistical measures, such as means and aggregates, their estimates will generally be subject to large variances. Additionally, a particular state population estimate from the CE sample may be far from the true state population.

XI. INTERPRETING THE DATA

Several factors should be considered when interpreting the expenditure data. The average expenditure for an item may be considerably lower than the expenditure by those CUs that purchased the item. The less frequently an item is purchased, the greater the difference between the average for all CUs and the average of those purchasing. (See Section V.A.2.b.ii. for MEANS OF THOSE REPORTING.) Also, an individual CU may spend more or less than the average, depending on its particular characteristics. Factors such as income, age of family members, geographic location, taste and personal preference influence expenditures. Furthermore, even within groups with similar characteristics, the distribution of expenditures varies substantially.

Expenditures reported are the direct out-of-pocket expenditures. Indirect expenditures, which may be significant, may be reflected elsewhere. For example, rental contracts often include utilities. Renters with such contracts would record no direct expense for utilities, and therefore, appear to have lower utility expenses. Employers or insurance companies frequently pay other costs. CU with members whose employers pay for all or part of their health insurance or life insurance would have lower direct expenses for these items than those who pay the entire amount themselves. These points should be considered when relating reported averages to individual circumstances.

XII. APPENDIX 1 -- GLOSSARY

Population

The civilian noninstitutional population of the United States as well as that portion of the institutional population living in the following group quarters: Boarding houses, housing facilities for students and workers, staff units in hospitals and homes for the aged, infirm, or needy, permanent living quarters in hotels and motels, and mobile home parks. Urban population is defined as all persons living in a Metropolitan Statistical Area (MSA's) and in urbanized areas and urban places of 2,500 or more persons outside of MSA's. Urban, defined in this survey, includes the rural populations within MSA. The general concept of an MSA is one of a large population nucleus together with adjacent communities that have a high degree of economic and social integration with that nucleus. Rural

population is defined as all persons living outside of an MSA and within an area with less than 2,500 persons.

Consumer unit (CU)

A consumer unit comprises either: (1) all members of a particular household who are related by blood, marriage, adoption, or other legal arrangements; (2) a person living alone or sharing a household with others or living as a roomer in a private home or lodging house or in permanent living quarters in a hotel or motel, but who is financially independent; or (3) two or more persons living together who use their income to make joint expenditures. Financial independence is determined by the three major expense categories: housing, food, and other living expenses. To be considered financially independent, at least two of the three major expense categories have to be provided entirely or in part by the respondent.

Reference person

The first member mentioned by the respondent when asked to "Start with the name of the person or one of the persons who owns or rents the home." It is with respect to this person that the relationship of other CU members is determined.

Income before taxes

The combined income earned by all CU members 14 years old or over during the 12 months preceding the interview. The components of income are: Wage and salary income, business income, farm income, Social Security income and Supplemental Security income, unemployment compensation, workmen's compensation, public assistance, welfare, interest, dividends, pension income, income from roomers or boarders, other rental income, income from regular contributions, other income, and food stamps.

Income after taxes

Income before taxes minus personal taxes, which includes Federal income taxes, state and local taxes, and other taxes.

Complete income reporters

The distinction between complete and incomplete income reporters is based in general on whether the respondent provides values for major sources of income, such as wages and salaries, self-employment income, and Social Security income. Even complete income reporters may not provide a full accounting of all income from all sources. In the current survey, CUs that report across-the-board zero income are categorized as incomplete reporters.

Geographic regions

CUs are classified by region according to the address at which they reside during the time of participation in the survey. The regions comprise the following States:

Northeast - Connecticut, Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, and Vermont

Midwest - Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, and Wisconsin

South - Alabama, Arkansas, Delaware, District of Columbia, Florida, Georgia, Kentucky, Louisiana, Maryland, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, Virginia, and West Virginia

West - Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, and Wyoming

XIII.APPENDIX 2 -- UNIVERSAL CLASSIFICATION CODE (UCC) TITLES

*L denotes UCCs that could have negative values. Medical care UCCs have negative values if they are reimbursements. Reduction in loan principal UCCs are all negative for programming convenience. However, they are considered positive expenditures in CE publications.

Underlined UCCs represent either a new UCC or a deleted UCC. Please note that new UCCs may not be represented in all quarters. The quarter in which the addition (deletion) occurs is denoted by a leading superscript directly prior to the UCC code. For example, ^{N(D)021}(UCC) identifies a new (deleted) UCC beginning in Q021.

A. EXPENDITURE UCCS ON MTAB FILE

- 002120 Other non-health insurance
- 006001 Total amount owed to creditors, 2nd interview
- 006002 Total amount owed to creditors, 5th interview
- *L 006003 Total amount owed to creditors, 2nd interview, asked first quarter, current year (2000)
- *L 006004 Total amount owed to creditors, 5th interview, asked first quarter, current year (2000)
- 006005 Total amount owed to creditors, 2nd interview, asked first quarter, current year + 1 (2001)
- 006006 Total amount owed to creditors, 5th interview, asked first quarter, current year +1 (2001)
- 190901 Food or board, at school and rooming/boarding houses
- 190902 Catered affairs
- 190903 Food and non-alc beverages at restaurants, cafes, fast food places on trips
- 190904 Food and beverages purchased and prepared by CU on trips
- 200900 Alcoholic beverages at restaurants, cafes, bars on trips
- 210110 Rent of dwelling
- 210210 Lodging away from home on trips
- 210310 Housing for someone at school
- 210901 Ground rent - owned home
- 210902 Ground rent - owned vacation home
- 220121 Homeowners insurance - owned home including fire and extended coverage; management fees for property insurance in coops (non-vacation)
- 220122 Same as 220121 - owned vacation home, vacation coops
- 220311 Mortgage interest - owned home; portion of management fees for repayment of loans in coops (non-vacation)
- 220211 Property taxes - owned home; management fees for property taxes in coops (non-vacation)
- 220212 Same as 220211 - owned vacation home, vacation coops
- 220312 Same as 220311 - owned vacation home; vacation coops
- 220313 Interest on home equity loan - owned home
- 220314 Interest on home equity loan - owned vacation home
- 220321 Penalty charges on special or lump-sum mortgage payment - owned home
- 220322 Penalty charges on special or lump-sum mortgage payment - owned vacation home
- 220512 Cost of supplies purchased for jobs considered addition, alteration, or new construction incl. dwellings and additions being built, finishing basement or attic, remodeling rooms, landscaping, building outdoor patios, driveways, or permanent swimming pools, and insulation - owned home
- 220513 Same as 220512 - owned vacation home
- 220611 Contractors' labor and material costs, and cost of supplies rented for jobs considered addition, alteration, or new construction (see 220512) - owned home; management fees for capital improvements in condos and coops (non-vacation)
- 220612 Built-in dishwasher, garbage disposal, or range hood for jobs considered addition, alteration, or new construction - owned home and vacation home
- 220615 Same as 220611 - owned vacation home; vacation condos and coops

220616 Installed and non-installed original wall to wall carpeting for owned homes
 220901 Parking at owned home; management fees for parking in condos and coops (non-vacation)
 220902 Parking at owned vacation home, vacation condos and coops
 230112 Contractors labor and material costs, and cost of supplies rented for inside and outside painting and papering for jobs considered replacement or maintenance/repair - owned home; management fees for similar jobs in condos and coops (non-vacation)
 230113 Same as 230112 for plumbing or water heating installations and repairs
 230114 Same as 230112 for electrical work and heating or air - conditioning jobs (incl. service contracts)
 230115 Same as 230112 for roofing, gutters, or downspouts
 230117 Built-in dishwasher, garbage disposal, or range hood for jobs considered replacement or maintenance/repair - renter
 230118 Same as 230117 - owned home
 230121 Contractors' labor and material costs, and cost of supplies rented for repair or replacement of hard surfaced flooring - renter
 230122 Contractors' labor and material costs, and cost of supplies rented for repair or replacement of hard surfaced flooring for jobs considered replacement or maintenance/repair- owned home; management fees for similar jobs in condos and coops (non-vacation)
 230123 Same as 230122 - owned vacation home; vacation condos and coops
 230133 Installed and non-installed replacement wall to wall carpeting for owned homes
 230134 Installed and non-installed original wall to wall carpeting for rental homes
 230141 Service contract charges and cost of maintenance or repair for built-in dishwasher, garbage disposal, or range hood - renter
 230150 Repair or maintenance services (renter)
 230151 Other repair or maintenance services (owned)
 230152 Repair and remodeling services (owned vacation)
 230142 Same as 230141 - owned home and vacation home
 230901 Property management fees - owned home; condos and coops (non-vacation)
 230902 Same as 230901 - owned vacation home; vacation condos and coops
 240111 Cost of paint, wallpaper, and supplies purchased for inside and outside painting and papering - renter
 240112 Same as 240111 - for jobs considered replacement or maintenance/repair - owned home
 240113 Same as 240112 - owned vacation home
 240121 Cost of equipment purchased for inside and outside painting and papering - renter
 240122 Same as 240121 - for jobs considered replacement or maintenance/repair - owned home
 240123 Same as 240122 - owned vacation home
 240211 Cost of supplies purchased for plastering, paneling, roofing and gutters, siding, windows, screens, doors, awnings; portion of cost of supplies purchased for patios, walks, fences, driveways, swimming pools - renter
 240212 Cost of supplies purchased for plastering, paneling, siding, windows, screens, doors, awnings for jobs considered replacement or maintenance/repair; portion of cost of supplies purchased for patios, walks, fences, driveways, swimming pools for jobs considered replacement or maintenance/repair - owned home
 240213 Cost of supplies purchased for roofing, gutters, or downspouts for jobs considered replacement or maintenance/repair - owned home
 240214 Same as 240212-240213 - owned vacation home
 240221 Cost of supplies purchased for masonry, brick or stucco work; portion of cost of supplies purchased for patios, walks, fences, driveways, swimming pools - renter
 240222 Same as 240221 for jobs considered replacement or maintenance/repair - owned home
 240223 Same as 240222 - owned vacation home
 240311 Cost of supplies purchased for plumbing or water heating installations and repairs - renter
 240312 Same as 240311 for jobs considered replacement or maintenance/repair - owned home
 240313 Same as 240312 - owned vacation home
 240321 Cost of supplies purchased for electrical work, heating or air conditioning jobs - renter
 240322 Same as 240321 for jobs considered replacement or maintenance/repair - owned home
 240323 Same as 240322 - owned vacation home

250111 Fuel oil - renter
 250112 Fuel oil - owned home; portion of management fees for utilities in condos and coops (non vacation)
 250113 Same as 250112 - owned vacation home; vacation condos and coops
 250114 Fuel oil - rented vacation property
 250211 Gas, bottled or tank - renter
 250212 Gas, bottled or tank - owned home
 250213 Gas, bottled or tank - owned vacation home
 250214 Gas, bottled or tank - rented vacation property
 250221 Coal - renter
 250222 Coal - owned home
 250223 Coal - owned vacation home
 250224 Coal - rented vacation property
 250901 Wood, kerosene, and other fuels - renter
 250902 Wood, kerosene, and other fuels - owned home
 250903 Wood, kerosene, and other fuels - owned vacation home
 250904 Wood, kerosene, and other fuels - rented vacation property
 260111 Electricity - renter
 260112 Electricity - owned home; portion of management fees for utilities in condos and coops (non-vacation)
 260113 Same as 260112 - owned vacation home; vacation condos and coops
 260114 Electricity - rented vacation property
 260211 Natural or utility gas - renter
 260212 Natural or utility gas - owned home; portion of management fees for utilities in condos and coops (non-vacation)
 260213 Same as 260212 - owned vacation home; vacation condos and coops
 260214 Natural or utility gas - rented vacation property
 270101 Residential telephone or pay phones
 270102 Cellular phone service
 270103 Pager services
 270104 Phone cards
 270211 Water and sewerage maintenance – renter
 270212 Water and sewerage maintenance – owned home; portion of management fees for utilities in condos and coops (non-vacation)
 270213 Same as 270212 – owned vacation home; vacation condos and coops
 270214 Water and sewerage maintenance – rented vacation property
 270310 Cable, satellite, or community antenna service
 270411 Trash and garbage collection – renter
 270412 Trash and garbage collection – owned home; management fees for trash collection in condos and coops (non-vacation)
 270413 Same as 270412 – owned vacation home; vacation condos and coops
 270414 Trash and garbage collection – rented vacation property
 270901 Septic tank cleaning – renter
 270902 Septic tank cleaning – owned home
 270903 Septic tank cleaning – owned vacation home
 270904 Septic tank cleaning – rented vacation property
 280110 Bathroom linens
 280120 Bedroom linens
 280130 Kitchen and dining room linens
 280210 Curtains and drapes
 280220 Slipcovers, decorative pillows, and cushions
 280230 Sewing materials for slipcovers, curtains, and other home handiwork
 280900 Other linens
 290110 Mattresses and springs
 290120 Other bedroom furniture
 290210 Sofas

290310 Living room chairs
 290320 Living room tables
 290410 All kitchen and dining room furniture
 290420 Infants' furniture
 290430 Patio, porch, or outdoor furniture
 290440 Modular wall units, shelves or cabinets; other living room, family or recreation room furniture including desks
 300111 Purchase and installation of refrigerator or home freezer – renter
 300112 Purchase and installation of refrigerator or home freezer – homeowner
 300211 Purchase and installation of clothes washer – renter
 300212 Purchase and installation of clothes washer – homeowner
 300221 Purchase and installation of clothes dryer – renter
 300222 Purchase and installation of clothes dryer – homeowner
 300311 Purchase and installation of cooking stove, range or oven, excl. microwave – renter
 300312 Purchase and installation of cooking stove, range or oven, excl. microwave – homeowner
 300321 Purchase and installation of microwave oven – renter
 300322 Purchase and installation of microwave oven – homeowner
 300331 Purchase and installation of portable dishwasher – renter
 300332 Purchase and installation of portable dishwasher – homeowner
 300411 Window air conditioner – renter
 300412 Window air conditioner – homeowner
 310110 Black and white TV, and combinations of TV with other items
 310120 Color TV console and combinations of TV; large screen color TV projection equipment; color monitor and other items
 310130 Color TV (portable and table models)
 310210 VCR, video disc player, video camera, and camcorder
 310220 Video cassettes, tapes, and discs
 310230 TV computers games and computer game software
 310311 Radio
 310313 Tape recorder and player
 310320 Sound components, component systems, and compact disc sound systems
 310333 Accessories and other sound equipment including phonographs
 310334 Satellite dishes
 310341 Compact discs, tapes, videos, or records purchased from a club
 310342 Compact discs, tapes, needles, or records not from a club
 320111 Carpet squares for owned and rented homes (Non-Permanent)
 320120 Venetian blinds, window shades and other window coverings
 320130 Infants' equipment
 320150 Outdoor equipment
 320162 Non-installed wall to wall carpeting (replacement) and carpet squares – homeowner
 320163 Installed and non-installed replacement wall to wall carpeting for rental homes
 320210 Clocks
 320220 Lamps and other lighting fixtures
 320231 Other household decorative items
 320232 Telephones and accessories
 320310 Plastic dinnerware
 320320 China and other dinnerware
 320330 Stainless, silver and other flatware
 320340 Glassware
 320350 Silver serving pieces
 320360 Serving pieces other than silver
 320370 Non-electric cookware
 320410 Lawnmowing equipment and other yard machinery
 320420 Power tools
 320511 Electric floor cleaning equipment
 320512 Sewing machines

320521 Small electrical kitchen appliances
 320522 Portable heating and cooling equipment
 320611 Cost of supplies purchased for insulation and other improvements/repairs; materials and supplies purchased not for any specific job – renter
 320612 Cost of supplies purchased for insulation and other improvements/repairs for jobs considered replacement or maintenance/repair; materials and supplies purchased not for any specific job – owned home
 320613 Cost of supplies purchased for insulation and other improvements/repairs for jobs considered replacement or maintenance/repair – owned vacation home
 320621 Cost of supplies purchased for repair or replacement of hard surfaced flooring – renter
 320622 Cost of supplies purchased for repair or replacement of hard surfaced flooring for jobs considered replacement or maintenance/repair – owned home
 320623 Same as 320622 – owned vacation home
 320631 Cost of supplies purchased for landscaping – renter
 320632 Cost of supplies purchased for landscaping for jobs considered replacement or maintenance/repair – owned home
 320633 Same as 320632 – owned vacation home
 320901 Office furniture for home use
 320902 Non-power tools
 320903 Fresh flowers or potted plants
 320904 Closet storage items
 330511 Cost of materials purchased for termite and pest control for jobs considered replacement or maintenance/repair
 340211 Babysitting or other child care in your own home
 340212 Babysitting or other child care in someone else's home
 340310 Housekeeping service, incl. management fees for maid service in condos
 340410 Gardening and lawn care services, incl. management fees for lawn care in coops and condos
 340420 Water softening service
 340510 Moving, storage, and freight express
 340520 Non-clothing household laundry or dry cleaning – not coin-operated
 340530 Non-clothing household laundry or dry cleaning – coin-operated
 340610 Repair of television, radio, and sound equipment, excluding installed in vehicles
 340620 Repair of household appliances, excl. garbage disposal, range hood, and built-in dishwasher
 340630 Furniture repair, refinishing, or reupholstering
 340901 Rental or repair of equipment and other yard machinery, power and non-power tools
 340902 Rental of televisions
 340903 Miscellaneous home services and small repair jobs not already specified
 340904 Rental of furniture
 340905 Rental of VCR, radio, and sound equipment – see 310210, 310311-310330
 340906 Care for invalids, convalescents, handicapped or elderly persons in the CU
 340907 Rental and installation of household equipment – see 300111-300332
 340908 Rental of office equipment for non-business use – see 320232, 690111, 690112, 690210-690230
 340910 Adult day care centers
 340911 Management fees for security, incl. guards and alarm systems in coops and condos (non-vacation)
 340912 Management fees for security, incl. guards and alarm systems in coops and condos (vacation)
 340914 Services for termite/pest control maintenance
 340915 Service fee expenditures for home security systems
 350110 Tenant's insurance
 360110 Men's suits
 360120 Men's sport coats
 360210 Men's coats, jackets, and furs
 360311 Men's underwear

360312 Men's hosiery
 360320 Men's nightwear
 360330 Men's accessories
 360340 Men's sweaters and vests
 360350 Men's active sportswear
 360410 Men's shirts
 360511 Men's pants
 360512 Men's shorts and shorts sets, excl. athletic
 360901 Men's uniforms
 360902 Men's other clothing, incl. costumes
 370110 Boys' coats, jackets, and furs
 370120 Boys' sweaters
 370130 Boys' shirts
 370211 Boys' underwear
 370212 Boys' nightwear
 370213 Boys' hosiery
 370220 Boys' accessories
 370311 Boys' suits, sport coats, and vests
 370312 Boys' pants
 370313 Boys' shorts and shorts sets, excl. athletic
 370902 Boys' other clothing, incl. costumes
 370903 Boys' uniforms
 370904 Boys' active sportswear
 380110 Women's coats, jackets, and furs
 380210 Women's dresses
 380311 Women's sport coats and tailored jackets
 380312 Women's vests, sweaters, and sweater sets
 380313 Women's shirts, tops, and blouses
 380320 Women's skirts and culottes
 380331 Women's pants
 380332 Women's shorts and shorts sets, excl. athletic
 380340 Women's active sportswear
 380410 Women's nightwear
 380420 Women's undergarments
 380430 Women's hosiery
 380510 Women's suits
 380901 Women's accessories
 380902 Women's uniforms
 380903 Women's other clothing, incl. costumes
 390110 Girls' coats, jackets, and furs
 390120 Girls' dresses and suits
 390210 Girls' sport coats, tailored jackets, shirts, blouses, sweaters, sweater sets, and vests
 390221 Girls' skirts, culottes, and pants
 390222 Girls' shorts and shorts sets, excl. athletic
 390230 Girls' active sportswear
 390310 Girls' undergarments and nightwear
 390321 Girls' hosiery
 390322 Girls' accessories
 390901 Girls' uniforms
 390902 Girls' other clothing, incl. costumes
 400110 Men's footwear
 400210 Boys' footwear
 400220 Girls' footwear
 400310 Women's footwear
 410110 Infants' coats, jackets, and snowsuits
 410120 Infants' dresses and other outerwear

410130 Infants' undergarments, incl. diapers
 410140 Infants' sleeping garments
 410901 Infants' accessories, hosiery, and footwear
 420110 Sewing materials for making clothes
 420120 Sewing notions, patterns
 430110 Watches
 430120 Jewelry
 430130 Travel items, including luggage, and luggage carriers
 440110 Shoe repair and other shoe services
 440120 Apparel laundry and dry cleaning – coin-operated
 440130 Alteration, repair, and tailoring of apparel and accessories
 440140 Clothing rental
 440150 Watch and jewelry repair
 440210 Apparel laundry and dry cleaning – not coin-operated
 440900 Clothing storage
 450110 New cars (net outlay)
 450116 Trade-in allowance for new cars
 450210 New trucks or vans (net outlay)
 450216 Trade-in allowance for new trucks or vans
 450220 New motorcycles, motor scooters, or mopeds (net outlay)
 450226 Trade-in allowance for new motorcycles, motor scooters, or mopeds
 450310 Basic lease charge (car lease)
 450311 Charges other than basic lease, such as insurance or maintenance (car lease)
 450312 Trade-in allowance (car lease)
 450313 Cash down payment (car lease)
 450314 Termination fee (car lease)
 450410 Basic lease charge (truck/van lease)
 450411 Charges other than basic lease, such as insurance or maintenance (truck/van lease)
 450412 Trade-in allowance (truck/van lease)
 450413 Cash down payment (truck/van lease)
 450414 Termination fee (truck/van lease)
 460110 Used cars (net outlay)
 460116 Trade-in allowance for used cars
 460901 Used trucks or vans (net outlay)
 460902 Used motorcycles, motor scooters, or mopeds (net outlay)
 460907 Trade-in allowance for used trucks or vans
 460908 Trade-in allowance for used motorcycles, motor scooters, or mopeds
 470111 Gasoline
 470112 Diesel fuel
 470113 Gasoline on out-of-town trips
 470211 Motor oil
 470212 Motor oil on out-of-town trips
 470220 Coolant/antifreeze, brake & transmission fluids, additives, and radiator/cooling system
 protectant (not purchased with tune-up)
 480110 Tires (new, used or recapped); replacement and mounting of tires, including tube
 replacement
 480213 Vehicle parts, equipment, and accessories
 480214 Vehicle audio equipment excluding labor
 490110 Body work, painting, repair and replacement of upholstery, vinyl/convertible top, and glass,
 installation of carpet
 490211 Clutch and transmission repair
 490212 Drive shaft and rear-end repair
 490221 Brake work
 490231 Steering or front end repair
 490232 Cooling system repair
 490311 Motor tune-up

- 490312 Lubrication and oil changes
- 490313 Front end alignment, wheel balance and rotation
- 490314 Shock absorber replacement
- 490318 Repair tires and miscellaneous repair work, such as battery charge, wash, wax, repair and replacement of windshield wiper, wiper motor, heater, air conditioner, radio and antenna
- 490319 Vehicle air conditioner repair
- 490411 Exhaust system repair
- 490412 Electrical system repair
- 490413 Motor repair and replacement
- 490501 Vehicle accessories including labor
- 490502 Vehicle audio equipment including labor
- 490900 Auto repair service policy
- 500110 Vehicle insurance
- 510110 Automobile finance charges
- 510901 Truck or van finance charges
- 510902 Motorcycle finance charges
- 520111 State vehicle registration
- 520112 Local vehicle registration
- 520310 Driver's license
- 520410 Vehicle inspection
- 520511 Auto rental, excl. trips
- 520512 Auto rental on out-of-town trips
- 520521 Truck or van rental, excl. trips
- 520522 Truck or van rental on out-of-town trips
- 520531 Parking fees at garages, meters, and lots excl. fees that are costs of property ownership
- 520532 Parking fees on out-of-town trips
- 520542 Tolls on out-of-town trips
- 520550 Towing charges (excl. contracted or pre-paid)
- 520901 Docking and landing fees for boats and planes
- 520902 Motorcycle, motor scooter, or moped rental
- 520903 Aircraft rental
- 520904 Rental of non camper-type trailer, such as for boat or cycle
- 520905 Same as 520902 – out-of-town trips
- 520906 Aircraft rental on out-of-town trips
- 520907 Rental of boat or non camper-type trailer, such as for boat or cycle on out-of-town trips
- 530110 Airline fares on out-of-town trips
- 530210 Intercity bus fares on out-of-town trips
- 530311 Intracity mass transit fares
- 530312 Local transportation (excl. taxis) on out-of-town trips
- 530411 Taxi fares on out-of-town trips
- 530412 Taxi fares and limousine service (not on trips)
- 530510 Intercity train fares on out-of-town trips
- 530901 Ship fares on out-of-town trips
- 530902 Private school bus
- *L 540000 Prescription drugs and medicines (net outlay)
- *L 550110 Purchase of eye glasses or contact lenses, incl. kits and equipment, fittings, warranty expenses, and insurance (net outlay)
- *L 550320 Purchase of medical or surgical equipment for general use, such as thermometers, needles/syringes, ice bags, heating pads, orthopedic appliances, and blood pressure kits (not including band aids, gauze, cotton rolls/balls) (net outlay)
- *L 550330 Purchase of supportive or convalescent medical equipment, such as crutches, wheelchairs, braces, and ace bandages (net outlay)
- *L 550340 Hearing aids (net outlay)
- *L 560110 Physicians' services (net outlay)
- *L 560210 Dental care (net outlay)
- *L 560310 Eye exams, treatment or surgery (net outlay)

- *L 560330 Lab tests and X-rays (net outlay)
- *L 560400 Services by medical professionals other than physicians, nursing services, and therapeutic treatments (net outlay)
- *L 570110 Hospital room and meals (net outlay)
- *L 570210 Hospital services other than room, such as operating, recovery, and treatment room, ICU, X-rays, lab tests, medicine, injections, therapy, examinations, transfusions, nursing services, oxygen, and anesthetics (net outlay)
- *L 570220 Care in convalescent or nursing home (net outlay)
- *L 570230 Other medical care service, such as blood donation, ambulance, emergency room, or outpatient hospital services (net outlay)
- 570240 Medical care in retirement community
- *L 570901 Rental of medical or surgical equipment for general use (net outlay) – see 550320
- *L 570903 Rental of supportive and convalescent equipment (net outlay) – see 550330
- 580111 Traditional fee for service health plan (not BC/BS)
- 580112 Traditional fee for service health plan (BC/BS)
- 580113 Preferred provider health plan (not BC/BS)
- 580114 Preferred provider health plan (BC/BS)
- 580311 Health maintenance organization (not BC/BS)
- 580312 Health maintenance organization (BC/BS)
- 580901 Medicare payment
- 580903 Commercial Medicare supplement (not BC/BS)
- 580904 Commercial Medicare supplement (BC/BS)
- 580905 Other health insurance (not BC/BS)
- 580906 Other health insurance (BC/BS)
- 590111 Newspaper subscriptions
- 590112 Newspapers, non-subscriptions
- 590211 Magazine subscriptions
- 590212 Magazines, non-subscription
- 590220 Books through book clubs
- 590230 Books not through book clubs
- 600110 Outboard motor
- 600121 Boat without motor or non camper-type trailer, such as for boat or cycle (net outlay)
- 600122 Trailer-type or other attachable-type camper (net outlay)
- 600127 Trade in allowance for boat without motor or non camper-type trailer, such as for boat or cycle
- 600128 Trade-in allowance for trailer-type or other attachable-type camper
- 600132 Boat with motor (net outlay)
- 600138 Trade-in allowance for boat with motor
- 600141 Purchase of motorized camper
- 600142 Purchase of other vehicle
- 600143 Trade in allowance, motorized camper
- 600144 Trade in allowance, other vehicle
- 600210 Ping-Pong, pool tables, other similar recreation room items, general sports equipment, and health and exercise equipment
- 600310 Bicycles
- 600410 Camping equipment
- 600420 Hunting and fishing equipment
- 600430 Winter sports equipment
- 600901 Water sports equipment
- 600902 Other sports equipment
- 610110 Toys, games, hobbies, tricycles, and battery powered riders
- 610120 Playground equipment
- 610130 Musical instruments, supplies, and accessories
- 610210 Photographic film
- 610230 Photographic equipment
- 610320 Pets, pet supplies and medicine for pets

610900 Miscellaneous recreational expenses on out-of-town trips
 620111 Membership fees for country clubs, health clubs, swimming pools, tennis clubs, social or other recreational organizations, civic, service, or fraternal organizations
 620112 Membership fees for credit card memberships
 620113 Membership fees for automobile service clubs
 620115 Membership fees for shopping clubs
 620121 Fees for participant sports, such as golf, tennis, and bowling; management fees for recreational facilities, such as tennis courts and swimming pools in condos and coops
 620122 Fees for participant sports on out-of-town trips
 620211 Admission fees for entertainment activities, including movie, theater, concert, opera or other musical series (single admissions and season tickets)
 620212 Entertainment expenses on out-of-town trips, including admissions to events, museums and tours
 620221 Admission fees to sporting events (single admissions and season tickets)
 620222 Admission fees to sporting events on out-of-town trips
 620310 Fees for recreational lessons or other instructions
 620320 Professional photography fees
 620330 Film processing
 620410 Pet services
 620420 Veterinarian expenses for pets
 620903 Miscellaneous entertainment services on out-of-town trips
 620904 Rental and repair of musical instruments, supplies, and accessories
 620905 Rental and repair of photographic equipment
 620906 Rental of all boats and outboard motors
 620908 Rental and repair of sports, recreation, and exercise equipment
 620909 Rental of all campers on out-of-town trips
 620912 Rental of video cassettes, tapes, and discs
 620919 Rental of other vehicles on out-of-town trips
 620921 Rental of motorized camper
 620922 Rental of other RV's
 620926 Lotteries and pari-mutuel losses
 630110 Cigarettes
 630210 Cigars, pipe tobacco, and other tobacco products
 640130 Wigs, hairpieces, or toupees
 640420 Electric personal care appliances
 650310 Personal care services for males and females, including haircuts
 650900 Rental and repair of personal care appliances
 660110 School books, supplies, and equipment for college
 660210 Same as 660110 - elementary and high school
 660310 Encyclopedia and other sets of reference books
 660900 Same as 660110 - day care center, nursery school, and other schools
 670110 Tuition for college
 670210 Same as 670110 - elementary and high school
 670310 Other expenses for day care centers and nursery schools, including tuition
 670901 Same as 670110 - other schools
 670902 Rentals of books and equipment, and other school-related expenses
 680110 Legal fees, excluding real estate closing costs
 680140 Funeral, burial or cremation expenses, including limousine and flowers
 680210 Safe deposit boxes
 680220 Charges for checking accounts and other banking services
 680901 Purchase and upkeep of cemetery lots or vaults
 680902 Accounting fees
 690111 Computers, computer systems, and related hardware for non-business use
 690112 Computer software and accessories for non-business use
 690113 Repair of computers, computer systems, and related equipment for non-business use
 690114 Computer information services

690210 Telephone answering devices
 690220 Calculators
 690230 Typewriters and other office machines for non-business use
 690241 Purchases and rentals of smoke alarms and detectors - renter
 690242 Same as 690241 - owned home
 690243 Same as 690241 - owned vacation home
 690244 Other household appliances - renter
 690245 Same as 690244 - homeowner
 700110 Life, endowment, annuities, and other insurance policies providing death benefits
 710110 Finance charges, excluding mortgage and vehicles
 790210 Total purchases at grocery stores
 790220 Food and nonalcoholic beverage purchases at grocery stores
 790230 Food and nonalcoholic beverage purchases at convenience or specialty stores
 790310 Beer and wine for home use
 790320 Other alcoholic beverages for home use
 790410 Dining out at restaurants, cafeterias, drive-ins, etc. (excluding alcoholic beverages)
 790420 Alcoholic beverages at restaurants, cafeterias, drive-ins, etc.
 790430 School meals for preschool and school age children
 790600 Same as 220111, 1220121, 220211, 220311, 220313, 220321, 210901, 250111-260211, 270211-270904, incl. management fees for these services - other properties; contractors' labor and material costs, and cost of supplies rented for jobs considered replacement or maintenance/repair - other properties; cost of supplies purchased for jobs considered replacement or maintenance/repair, excl. dwellings and additions being built, and termite and pest control - other properties
 790610 Contractors' labor and material costs, cost of supplies rented or purchased for jobs considered addition, alteration or new construction - other properties
 790611 Same as 220612 - other properties
 790620 Management fees for capital improvements - other properties
 790630 Special assessments for services and capital improvements - other properties
 790640 Same as 790620 for management, security, and parking - other properties
 790690 Cost of supplies purchased for dwellings and additions being built, finishing basement or attic, remodeling rooms, building outdoor patios, driveways, or permanent swimming pools - jobs not yet started - renter
 790710 Purchase price of property excluding cost of common areas - other properties
 790730 Closing costs - other properties
 *L 790810 Selling price or trade-in value - other properties
 790830 Total selling expenses - other properties
 *L 790910 Special or lump-sum mortgage payments - other properties
 *L 790920 Reduction of mortgage principal - other properties
 790930 Original mortgage amount (mortgage obtained during current quarter's interview) - other properties
 790940 Reduction of principal on lump sum home equity loan - other properties
 790950 Original amount of lump sum home equity loan - other properties (loan obtained during current quarter's interview)
 800111 Alimony expenditures
 800121 Child support expenditures
 800700 Meals received as pay
 800710 Rent received as pay
 800721 Market value of owned home
 800804 Support for college students
 800811 Gifts to non-CU members of stocks, bonds, mutual funds
 800821 Cash contributions to charities, other organizations
 800831 Cash contributions to churches or religious organizations
 800841 Cash contributions to educational institutions
 800851 Cash contributions to political organizations
 800861 Other cash gifts

- 810101 Purchase price of property excluding cost of common areas – owned home
- 810102 Purchase price of property excluding cost of common areas – owned vacation home
- 810301 Closing costs – owned home
- 810302 Closing costs – owned vacation home
- 810400 Trip expenses for persons outside the CU
- *L 820101 Selling price or trade-in value – owned home
- *L 820102 Selling price or trade-in value – owned vacation home
- 820301 Total selling expenses – owned home
- 820302 Total selling expenses – owned vacation home
- *L 830101 Special or lump-sum mortgage payments – owned home
- *L 830102 Special or lump-sum mortgage payments – owned vacation home
- *L 830201 Reduction of mortgage principal – owned home; portion of management fees for repayment of loans in coops (non-vacation)
- *L 830202 Same as 830201 – owned vacation home; vacation coops
- *L 830203 Reduction of principal on lump sum home equity loan – owned home
- *L 830204 Reduction of mortgage principal, lump sum home equity loan – owned vacation home
- 830301 Original mortgage amount (mortgage obtained during current quarter's interview) – owned home
- 830302 Original mortgage amount (mortgage obtained during current quarter's interview) – owned vacation home
- 830303 Original amount of lump sum home equity loan (loan obtained during current quarter's interview) – owned home
- 830304 Original amount of lump sum home equity loan (loan obtained during current quarter's interview) – owned vacation home
- 840101 Amount for special assessment for roads, streets, or similar purposes not included in property tax – owned home
- 840102 Amount for special assessment for roads, streets, or similar purposes not included in property tax – owned vacation home
- *L 850100 Reduction of principal on vehicle loan
- 850200 Amount borrowed excluding interest on vehicle loan
- 850300 Finance charges on other vehicles
- *L 860100 Amount automobile sold or reimbursed
- *L 860200 Amount truck or van sold or reimbursed
- *L 860301 Amount motorized camper sold or reimbursed
- *L 860302 Amount other vehicle sold or reimbursed
- *L 860400 Amount trailer-type or other attachable-type camper sold or reimbursed
- *L 860500 Amount motorcycle, motor scooter, or moped sold or reimbursed
- *L 860600 Amount boat with motor sold or reimbursed
- *L 860700 Amount boat without motor or non camper-type trailer, such as for or cycle sold or reimbursed
- 870101 New cars, trucks, or vans (net outlay), purchase not financed
- 870102 Cash downpayment for new cars, trucks, or vans, purchase financed
- 870103 Finance charges on loans for new cars, trucks, or vans
- 870104 Principal paid on loans for new cars, trucks, or vans
- 870201 Used cars, trucks, or vans (net outlay), purchase not financed
- 870202 Cash downpayment for used cars, trucks, or vans, purchase financed
- 870203 Finance charges on loans for used cars, trucks, or vans
- 870204 Principal paid on loans for used cars, trucks, or vans
- 870301 Motorcycles, motor scooters, or mopeds (net outlay), purchase not financed
- 870302 Cash downpayment for motorcycles, motor scooters, or mopeds, purchase financed
- 870303 Finance charges on loans for motorcycles, motor scooters, or mopeds
- 870304 Principal paid on loans for motorcycles, motor scooters, or mopeds
- 870401 Boat without motor or non camper-type trailer, such as for boat or cycle (net outlay), purchase not financed
- 870402 Cash downpayment for boat without motor, or non camper-type trailer, such as for boat or cycle, purchase financed

- 870403 Finance charges on loans for boat without motor or non camper- type trailer, such as for boat or cycle
- 870404 Principal paid on loans for boat without motor, or non camper-trailer, such as for boat or cycle
- 870501 Trailer-type or other attachable-type camper (net outlay), purchase not financed
- 870502 Cash downpayment for trailer-type or other attachable-type camper, purchase financed
- 870503 Finance charges on loans for trailer-type or other attachable-type camper
- 870504 Principal paid on loans for trailer-type or other attachable-type camper
- 870605 Purchase of motorized camper, not financed
- 870606 Principal, motorized camper, financed
- 870607 Interest, motorized camper, financed
- 870608 Downpayment, motorized camper, financed
- 870701 Boat with motor (net outlay), purchase not financed
- 870702 Cash downpayment for boat with motor, purchase financed
- 870703 Finance charges on loans for boat with motor
- 870704 Principal paid on loans for boat with motor
- 870801 Purchase of other vehicle, not financed
- 870802 Principal, other vehicle, financed
- 870803 Interest, other vehicle, financed
- 870804 Downpayment, other vehicle, financed
- 880110 Interest on line of credit home equity loan – owned home
- *L 880120 Reduction of principal on line of credit home equity loan – owned home
- 880210 Interest on line of credit home equity loan – other properties
- *L 880220 Reduction of principal on line of credit home equity loan – other properties
- 880310 Interest on line of credit home equity loan – owned vacation home
- *L 880320 Reduction of principal on line of credit home equity loan – owned vacation home
- 900002 Occupational expenses
- 910050 Rental equivalence of owned home
- 910100 Rental equivalence of owned vacation home
- 990900 Rental and installation of dishwasher, disposal, and range hood
- 990920 Cost of supplies purchased for dwellings and additions being built, finishing basement or attic, remodeling rooms, or building outdoor patios, walks, fences, driveways or swimming pools - renter
- 990930 Cost of supplies purchased finishing basement or attic, remodeling rooms or building outdoor patios, walks, fences, driveways or swimming pools for jobs considered maintenance/repair - owner
- 990940 Same as 990930 - owned vacation home
- 990950 Contractors' labor and material costs, and cost of supplies rented for dwellings and additions being built - other properties

B. INCOME AND RELATED UCCS ON ITAB FILE

- 001000 Purchase price of stocks, bonds, or mutual funds including broker fees
- *L 001010 Sale price of stocks, bonds, and mutual funds, net
- 001210 Investments to farm or business
- *L 001220 Assets taken from farm and business
- *L 002010 Change in savings account
- *L 002020 Change in checking account
- *L 002030 Change in amount held in U.S. savings bonds
- *L 003000 Change in money owed to CU
- *L 003100 Amount received in settlement on surrender of insurance policies
- 800910 Payroll deductions for government retirement
- 800920 Payroll deductions for railroad retirement
- 800931 Payroll deductions for private pensions

800932 Non-payroll deposit to individual retirement plan
 800940 Payroll deductions for Social Security
 900000 Wages and salaries
 *L 900010 Net business income
 *L 900020 Net farm income
 900030 Social Security and railroad retirement income
 900040 Pensions and annuities
 900050 Dividends, royalties, estates or trusts
 *L 900060 Income from roomers and boarders
 *L 900070 Other rental income
 900080 Interest from savings accounts or bonds
 900090 Supplemental security income
 900100 Unemployment compensation
 900110 Workers' compensation and veterans payments including education
 900120 Public assistance or welfare including money received from job training grants such as Job Corps
 900131 Child support payments received (regular)
 900132 Other regular contributions received including alimony
 900140 Other income including money received from care of foster children, cash scholarships and fellowships or stipends not based on working
 900150 Food stamps
 910000 Lump sum payments from estates, trusts, royalties, alimony, child support, prizes or games of chance or from persons outside CU
 910010 Money from sale of household furnishings, equipment, clothing, jewelry, pets or other belongings, excluding the sale of vehicles or property
 910020 Overpayment on Social Security
 910030 Refund from insurance policies
 910040 Refunds from property taxes
 910041 Lump sum child support payments received
 920010 Market value of savings accounts
 920020 Market value of checking accounts, brokerage accounts and other similar accounts
 920030 Market value of U.S. savings bonds
 920040 Market value of stocks, bonds, mutual funds and other such securities
 950000 Federal income tax
 *L 950001 Federal income tax refunds
 950010 State and local income tax
 *L 950011 State and local income tax refunds
 950021 Other taxes
 950022 Personal property taxes
 *L 950023 Other tax refunds
 *L 980000 Income before taxes
 980010 Family size
 980020 Age of reference person
 980030 Number of earners
 980040 Number of vehicles
 980050 Number of persons under 18
 980060 Number of persons 65 and over
 *L 980070 Income after taxes
 980090 Percent homeowner
 980210 Percent male reference person
 980220 Percent female reference person
 980230 Percent homeowner with mortgage
 980240 Percent homeowner without mortgage
 980250 Percent homeowner, mortgage not reported
 980260 Percent renter
 980270 Percent black reference person

- 980280 Percent non-black reference person
- 980290 Percent reference person with elementary education
- 980300 Percent reference person with high school education
- 980310 Percent reference person with college education
- 980320 Percent reference person with no education/other
- 980330 Percent vehicle owner
- 980340 Percent of CUs with at least one leased auto, truck, or van
- 980350 Percent of CUs with at least one owned or leased vehicle
- 980360 Number of vehicles leased

XIV.APPENDIX 3 -- UCC AGGREGATION

The lstub file in the Programs folder on the CD shows the UCC aggregation used in the sample program. This aggregation scheme may also be found on our website at www.bls.gov/cex. New and used aircraft purchases are not on the microdata files for confidentiality reasons. They are included in the published CE tables so transportation estimates based on these data may vary slightly from BLS published tables.

XV.APPENDIX 4 -- FMLY AND MEMB VARIABLES ORDERED BY START POSITION

This appendix lists FMLY and MEMB variables in the order that they appear on the files. Sections III.F.1. CONSUMER UNIT (CU) CHARACTERISTICS AND INCOME FILE (FMLY) and III.F.2. MEMBER CHARACTERISTICS AND INCOME (MEMB) FILE contain detailed descriptions of these variables arranged on a functional basis.

A. FMLY FILE

| Variable | Start Position | Variable | Start Position | Variable | Start Position |
|----------|----------------|----------|----------------|----------|----------------|
| NEWID | 1 | AS_C_MP4 | 37 | COMPBND | 143 |
| DIRACC | 9 | AS_COMP5 | 38 | COMPBND_ | 144 |
| DIRACC_ | 10 | AS_C_MP5 | 40 | COMPBNDX | 145 |
| AGE_REF | 11 | BATHRMQ | 41 | COMP_NDX | 153 |
| AGE_REF_ | 13 | BATHRMQ_ | 44 | COMPCKG | 154 |
| AGE2 | 14 | BEDROOMQ | 45 | COMPCKG_ | 155 |
| AGE2_ | 16 | BEDR_OMQ | 48 | COMPCKGX | 156 |
| AS_COMP1 | 26 | BLS_URBN | 49 | COMP_KGX | 164 |
| AS_C_MP1 | 28 | BSINVSTX | 50 | COMPENSX | 165 |
| AS_COMP2 | 29 | BSIN_STX | 60 | COMP_NSX | 173 |
| AS_C_MP2 | 31 | BUILDING | 61 | COMPOWD | 174 |
| AS_COMP3 | 32 | BUIL_ING | 63 | COMPOWD_ | 175 |
| AS_C_MP3 | 34 | CKBKACTX | 85 | COMPOWDX | 176 |
| AS_COMP4 | 35 | CKBK_CTX | 95 | COMP_WDX | 184 |

| Variable | Start Position | Variable | Start Position | Variable | Start Position |
|-----------|----------------|----------|----------------|----------|----------------|
| COMP SAV | 185 | FRRETIRX | 379 | MONY_WDX | 555 |
| COMP SAV_ | 186 | FRRE_IRX | 387 | NO_EARNR | 556 |
| COMP SAVX | 187 | FSALARYX | 388 | NO_E_RNR | 558 |
| COMP_AVX | 195 | FSAL_RYX | 396 | NO_EARNX | 559 |
| COMPSEC | 196 | FSLTAXX | 397 | NO_E_RNX | 568 |
| COMPSEC_ | 197 | FSLTAXX_ | 405 | NONINCMX | 572 |
| COMPSECX | 198 | FSSIX | 406 | NONI_CMX | 580 |
| COMP_ECX | 206 | FSSIX_ | 414 | NUM_AUTO | 581 |
| CUTENURE | 216 | GOVTCOST | 421 | NUM_UTO | 583 |
| CUTE_URE | 217 | GOVT_OST | 422 | OCCUCOD1 | 593 |
| EARNCOMP | 221 | HLFBATHQ | 423 | OCCU_OD1 | 595 |
| EARN_OMP | 222 | HLFB_THQ | 426 | OCCUCOD2 | 596 |
| EARNINCX | 223 | INC_HRS1 | 427 | OCCU_OD2 | 598 |
| EARN_NCX | 232 | INC_RS1 | 430 | ORIGIN1 | 599 |
| EDUC_REF | 233 | INC_HRS2 | 431 | ORIGIN1_ | 600 |
| EDUC0REF | 235 | INC_RS2 | 434 | ORIGIN2 | 601 |
| EDUCA2 | 236 | INC_RANK | 435 | ORIGIN2_ | 602 |
| EDUCA2_ | 238 | INC__ANK | 445 | OTHRFNDX | 606 |
| FAM_SIZE | 242 | INC_RNKU | 446 | OTHR_NDX | 614 |
| FAM_IZE | 244 | INC__NKU | 455 | OTHRINCX | 615 |
| FAM_TYPE | 245 | INCLOSSA | 456 | OTHR_NCX | 623 |
| FAM__YPE | 246 | INCL_SSA | 464 | PENSIONX | 624 |
| FAMTFEDX | 247 | INCLOSSB | 465 | PENS_ONX | 632 |
| FAMT_EDX | 255 | INCL_SSB | 473 | PERSLT18 | 633 |
| FEDRFNDX | 256 | INCNONW1 | 474 | PERS_T18 | 635 |
| FEDR_NDX | 264 | INCN_NW1 | 475 | PERSOT64 | 636 |
| FEDTAXX | 265 | INCNONW2 | 476 | PERS_T64 | 638 |
| FEDTAXX_ | 273 | INCN_NW2 | 477 | POPSIZE | 639 |
| FFRMINCX | 274 | INCOMEY1 | 478 | PRINEARN | 640 |
| FFRM_NCX | 283 | INCO_EY1 | 479 | PRIN_ARN | 642 |
| FGOVRETX | 284 | INCOMEY2 | 480 | PTAXRFDX | 643 |
| FGOV_ETX | 292 | INCO_EY2 | 481 | PTAX_FDX | 651 |
| FINCATAX | 293 | INCWEEK1 | 482 | PUBLHOUS | 652 |
| FINCAT_X | 302 | INCW_EK1 | 484 | PUBL_OUS | 653 |
| FINCBTAX | 303 | INCWEEK2 | 485 | PURSSECX | 654 |
| FINCBT_X | 312 | INCW_EK2 | 487 | PURS_ECX | 662 |
| FINDRETX | 313 | INSRFNDX | 488 | QINTRVMO | 663 |
| FIND_ETX | 321 | INSR_NDX | 496 | QINTRVYR | 665 |
| FININCX | 322 | INTEARNX | 497 | RACE2 | 669 |
| FININCX_ | 330 | INTE_RNX | 505 | RACE2_ | 670 |
| FINLWT21 | 331 | MISCTAXX | 515 | REF_RACE | 671 |
| FJSSDEDX | 342 | MISC_AX | 523 | REF__ACE | 672 |
| FJSS_EDX | 350 | LOT_SIZE | 524 | REGION | 673 |
| FNONFRMX | 351 | LOT_IZE | 526 | RENTEQVX | 674 |
| FNON_RMX | 360 | LUMPSUMX | 527 | RENT_QVX | 680 |
| FPRIPENX | 361 | LUMP_UMX | 535 | RESPSTAT | 681 |
| FPRI_ENX | 369 | MARITAL1 | 536 | RESP_TAT | 682 |
| FRRDEDX | 370 | MARI_AL1 | 537 | ROOMSQ | 683 |
| FRRDEDX_ | 378 | MONYOWDX | 547 | ROOMSQ_ | 686 |

| Variable | Start Position | Variable | Start Position | Variable | Start Position |
|----------|----------------|----------|----------------|----------|----------------|
| SALEINCX | 687 | WTREP11 | 951 | HOUSCQ | 1505 |
| SALE_NCX | 695 | WTREP12 | 962 | SHELTPQ | 1517 |
| SAVACCTX | 696 | WTREP13 | 973 | SHELTCQ | 1529 |
| SAVA_CTX | 706 | WTREP14 | 984 | OWNDWEPQ | 1541 |
| SECESTX | 707 | WTREP15 | 995 | OWNDWECQ | 1553 |
| SECESTX_ | 717 | WTREP16 | 1006 | MRTINTPQ | 1565 |
| SELLSECX | 718 | WTREP17 | 1017 | MRTINTCQ | 1577 |
| SELL_ECX | 728 | WTREP18 | 1028 | PROPTXPQ | 1589 |
| SETLINSX | 729 | WTREP19 | 1039 | PROPTXCQ | 1601 |
| SETL_NSX | 737 | WTREP20 | 1050 | MRPINSQ | 1613 |
| SEX_REF | 738 | WTREP21 | 1061 | MRPINSCQ | 1625 |
| SEX_REF_ | 739 | WTREP22 | 1072 | RENDWEPQ | 1637 |
| SEX2 | 740 | WTREP23 | 1083 | RENDWECQ | 1649 |
| SEX2_ | 741 | WTREP24 | 1094 | RNTXRPPQ | 1661 |
| SLOCTAXX | 742 | WTREP25 | 1105 | RNTXRPCQ | 1673 |
| SLOC_AX | 750 | WTREP26 | 1116 | RNTAPYPQ | 1685 |
| SLRFUNDX | 751 | WTREP27 | 1127 | RNTAPCQ | 1697 |
| SLRF_NDX | 759 | WTREP28 | 1138 | OTHLODPQ | 1709 |
| SMSASTAT | 760 | WTREP29 | 1149 | OTHLODCQ | 1721 |
| SSOVERPX | 761 | WTREP30 | 1160 | UTILPQ | 1733 |
| SSOV_RPX | 769 | WTREP31 | 1171 | UTILCQ | 1745 |
| ST_HOUS | 770 | WTREP32 | 1182 | NTLGASPQ | 1757 |
| ST_HOUS_ | 771 | WTREP33 | 1193 | NTLGASCQ | 1769 |
| TAXPROPX | 772 | WTREP34 | 1204 | ELCTRCQP | 1781 |
| TAXP_OPX | 780 | WTREP35 | 1215 | ELCTRCCQ | 1793 |
| TOTTXPDX | 781 | WTREP36 | 1226 | ALLFULPQ | 1805 |
| TOTT_PDX | 790 | WTREP37 | 1237 | ALLFULCQ | 1817 |
| UNEMPLX | 791 | WTREP38 | 1248 | FULOILPQ | 1829 |
| UNEMPLX_ | 799 | WTREP39 | 1259 | FULOILCQ | 1841 |
| USBNDX | 800 | WTREP40 | 1270 | OTHFLSPQ | 1853 |
| USBNDX_ | 808 | WTREP41 | 1281 | OTHFLSCQ | 1865 |
| VEHQ | 809 | WTREP42 | 1292 | TELEPHPQ | 1877 |
| VEHQ_ | 811 | WTREP43 | 1303 | TELEPHCQ | 1889 |
| WDBSASTX | 812 | WTREP44 | 1314 | WATRPSPQ | 1901 |
| WDBS_STX | 822 | TOTEXPPQ | 1325 | WATRPSCQ | 1913 |
| WDBSGDSX | 823 | TOTEXPCQ | 1337 | HOUSOPPQ | 1925 |
| WDBS_DSX | 831 | FOODPQ | 1349 | HOUSOPCQ | 1937 |
| WELFAREX | 832 | FOODCQ | 1361 | DOMSRVPQ | 1949 |
| WELF_REX | 840 | FDHOMEQP | 1373 | DOMSRVCQ | 1961 |
| WTREP01 | 841 | FDHOMECP | 1385 | DMSXCCPQ | 1973 |
| WTREP02 | 852 | FDAWAYPQ | 1397 | DMSXCCCQ | 1985 |
| WTREP03 | 863 | FDAWAYCQ | 1409 | BBYDAYPQ | 1997 |
| WTREP04 | 874 | FDXMAPPQ | 1421 | BBYDAYCQ | 2009 |
| WTREP05 | 885 | FDXMAPCQ | 1433 | OTHHEXPQ | 2021 |
| WTREP06 | 896 | FDMAPPQ | 1445 | OTHHEXCQ | 2033 |
| WTREP07 | 907 | FDMAPCQ | 1457 | HOUSEQPQ | 2045 |
| WTREP08 | 918 | ALCBEVPQ | 1469 | HOUSEQCQ | 2057 |
| WTREP09 | 929 | ALCBEVCQ | 1481 | TEXTILPQ | 2069 |
| WTREP10 | 940 | HOUSPQ | 1493 | TEXTILCQ | 2081 |

| Variable | Start Position | Variable | Start Position | Variable | Start Position |
|----------|----------------|-----------|----------------|----------|----------------|
| FURNTRPQ | 2093 | PUBTRACQ | 2681 | HH_CU_Q | 3269 |
| FURNTRCQ | 2105 | TRNTRPPQ | 2693 | HH_CU_Q_ | 3271 |
| FLRCVVPQ | 2117 | TRNTRPCQ | 2705 | HHID | 3272 |
| FLRCVRCQ | 2129 | TRNOTHPQ | 2717 | HHID_ | 3275 |
| MAJAPPQ | 2141 | TRNOTHCQ | 2729 | POV_CY | 3276 |
| MAJAPPCQ | 2153 | HEALTHPQ | 2741 | POV_CY_ | 3277 |
| SMLAPPQ | 2165 | HEALTHCQ | 2753 | POV_PY | 3278 |
| SMLAPPCQ | 2177 | HLTHINPQ | 2765 | POV_PY_ | 3279 |
| MISCEQPQ | 2189 | HLTHINCQ | 2777 | HEATFUEL | 3292 |
| MISCEQCQ | 2201 | MEDSRVPQ | 2789 | HEAT_UEL | 3294 |
| APPARPQ | 2213 | MEDSRVCQ | 2801 | SWIMPOOL | 3298 |
| APPARCQ | 2225 | PREDRGPQ | 2813 | SWIM_OOL | 3300 |
| MENBOYPQ | 2237 | PREDRGCQ | 2825 | WATERHT | 3307 |
| MENBOYCQ | 2249 | MEDSUPPQ | 2837 | WATERHT_ | 3309 |
| MENSIXPQ | 2261 | MEDSUPCQ | 2849 | APTMENT | 3310 |
| MENSIXCQ | 2273 | ENTERTPQ | 2861 | APTMENT_ | 3312 |
| BOYFIFPQ | 2285 | ENTERTCQ | 2873 | OFSTPARK | 3313 |
| BOYFIFCQ | 2297 | FEEADMPQ | 2885 | OFST_ARK | 3315 |
| WOMGRLPQ | 2309 | FEEADMCPQ | 2897 | WINDOWAC | 3316 |
| WOMGRLCQ | 2321 | TVRDIOPQ | 2909 | WIND_WAC | 3318 |
| WOMSIXPQ | 2333 | TVRDIOCQ | 2921 | CNTRALAC | 3319 |
| WOMSIXCQ | 2345 | OTHEQPPQ | 2933 | CNTR_LAC | 3321 |
| GRLFIFPQ | 2357 | OTHEQPCQ | 2945 | CHILDAGE | 3322 |
| GRLFIFCQ | 2369 | PETTOYPQ | 2957 | CHIL_AGE | 3323 |
| CHLDRNPQ | 2381 | PETTOYCQ | 2969 | INCLASS | 3324 |
| CHLDRNCQ | 2393 | OTHENTPQ | 2981 | STATE | 3326 |
| FOOTWRPQ | 2405 | OTHENTCQ | 2993 | STATE_ | 3328 |
| FOOTWRCQ | 2417 | PERSCAPQ | 3005 | CHDOTHX | 3329 |
| OTHAPLPQ | 2429 | PERSCACQ | 3017 | CHDOTHX_ | 3337 |
| OTHAPLCQ | 2441 | READPQ | 3029 | ALIOTHX | 3338 |
| TRANSPQ | 2453 | READCQ | 3041 | ALIOTHX_ | 3346 |
| TRANSCQ | 2465 | EDUCAPQ | 3053 | CHDLMPX | 3347 |
| CARTKNPQ | 2477 | EDUCACQ | 3065 | CHDLMPX_ | 3355 |
| CARTKNCQ | 2489 | TOBACCPQ | 3077 | ERANKMTH | 3356 |
| CARTKUPQ | 2501 | TOBACCCQ | 3089 | ERAN_MTH | 3367 |
| CARTKUCQ | 2513 | MISCPQ | 3101 | ERANKH | 3368 |
| OTHVEHPQ | 2525 | MISCCQ | 3113 | ERANKH_ | 3377 |
| OTHVEHCQ | 2537 | MISC1PQ | 3125 | ERANKUH | 3378 |
| GASMOPQ | 2549 | MISC1CQ | 3137 | ERANKUH_ | 3386 |
| GASMOCQ | 2561 | MISC2PQ | 3149 | TOTEX4PQ | 3387 |
| VEHFINPQ | 2573 | MISC2CQ | 3161 | TOTEX4CQ | 3399 |
| VEHFINCQ | 2585 | CASHCOPQ | 3173 | MISXC4PQ | 3411 |
| MAINRPPQ | 2597 | CASHCOCQ | 3185 | MISXC4CQ | 3423 |
| MAINRPCQ | 2609 | PERINSPQ | 3197 | CUINCOME | 3435 |
| VEHINSPQ | 2621 | PERINSCQ | 3209 | CUIN_OME | 3437 |
| VEHINSCQ | 2633 | LIFINSPQ | 3221 | RECORDS | 3438 |
| VRNTLOPQ | 2645 | LIFINSCQ | 3233 | RECORDS_ | 3439 |
| VRNTLOCQ | 2657 | RETPENPQ | 3245 | TYPERE1 | 3440 |
| PUBTRAPQ | 2669 | RETPENCQ | 3257 | TYPE_EC1 | 3441 |

| Variable | Start Position | Variable | Start Position | Variable | Start Position |
|----------|----------------|----------|----------------|----------|----------------|
| TYPEREC2 | 3442 | TOTHFARC | 3772 | ETOTALP | 4206 |
| TYPE_EC2 | 3443 | TLOCALTP | 3782 | ETOTALC | 4216 |
| TYPEREC3 | 3444 | TLOCALTC | 3792 | ETOTAPX4 | 4226 |
| TYPE_EC3 | 3445 | TENTRMNP | 3802 | ETOTACX4 | 4236 |
| TYPEREC4 | 3446 | TENTRMNC | 3812 | EHOUSNGP | 4246 |
| TYPE_EC4 | 3447 | TFEESADP | 3822 | EHOUSNGC | 4256 |
| TYPEREC5 | 3448 | TFEESADC | 3832 | ESHELTRP | 4266 |
| TYPE_EC5 | 3449 | TOTHENTP | 3842 | ESHELTRC | 4276 |
| TYPEREC6 | 3450 | TOTHENTC | 3852 | EOWNDWLP | 4286 |
| TYPE_EC6 | 3451 | OWNVACP | 3862 | EOWNDWLC | 4296 |
| TYPEREC7 | 3452 | OWNVACC | 3872 | EOTHLODP | 4306 |
| TYPE_EC7 | 3453 | VOTHRLOP | 3882 | EOTHLODC | 4316 |
| TYPEREC8 | 3454 | VOTHRLOC | 3892 | EMRTPNOP | 4326 |
| TYPE_EC8 | 3455 | VMISCHEP | 3902 | EMRTPNOC | 4336 |
| VEHQL | 3456 | VMISCHEC | 3912 | EMRTPNVP | 4346 |
| VEHQL_ | 3458 | UTILOWNP | 3922 | EMRTPNVC | 4356 |
| NUM_TVAN | 3459 | UTILOWNC | 3932 | ETRANPTP | 4366 |
| NUM__VAN | 3461 | VFUELOIP | 3942 | ETRANPTC | 4376 |
| TTOTALP | 3462 | VFUELOIC | 3952 | EVEHPURP | 4386 |
| TTOTALC | 3472 | VOTHRFLP | 3962 | EVEHPURC | 4396 |
| TFOODTOP | 3482 | VOTHRFLC | 3972 | ECARTKNP | 4406 |
| TFOODTOC | 3492 | VELECTRP | 3982 | ECARTKNC | 4416 |
| TFOODAWP | 3502 | VELECTRC | 3992 | ECARTKUP | 4426 |
| TFOODAWC | 3512 | VNATLGAP | 4002 | ECARTKUC | 4436 |
| TFOODHOP | 3522 | VNATLGAC | 4012 | EOTHVEHP | 4446 |
| TFOODHOC | 3532 | VWATERPP | 4022 | EOTHVEHC | 4456 |
| TALCBEVP | 3542 | VWATERPC | 4032 | EENTRMTP | 4466 |
| TALCBEVC | 3552 | MRTPRNOP | 4042 | EENTRMTC | 4476 |
| TOTHRLOP | 3562 | MRTPRNOC | 4052 | EOTHENTP | 4486 |
| TOTHRLOC | 3572 | UTILRNTP | 4062 | EOTHENTC | 4496 |
| TTRANPRP | 3582 | UTILRNTC | 4072 | ENOMOTRP | 4506 |
| TTRANPRC | 3592 | RFUELOIP | 4082 | ENOMOTRC | 4516 |
| TGASMOTP | 3602 | RFUELOIC | 4092 | EMOTRVHP | 4526 |
| TGASMOTC | 3612 | ROTHRFLP | 4102 | EMOTRVHC | 4536 |
| TVRENTLP | 3622 | ROTHRFLC | 4112 | EENTMSCP | 4546 |
| TVRENTLC | 3632 | RELECTRP | 4122 | EENTMSCC | 4556 |
| TCARTRKP | 3642 | RELECTRC | 4132 | EMISCELP | 4566 |
| TCARTRKC | 3652 | RNATLGAP | 4142 | EMISCELC | 4576 |
| TOTHVHRP | 3662 | RNATLGAC | 4152 | EMISCMTP | 4586 |
| TOTHVHRC | 3672 | RWATERPP | 4162 | EMISCMTC | 4596 |
| TOTHTREP | 3682 | RWATERPC | 4172 | UNISTRQ | 4606 |
| TOTHTREC | 3692 | POVLEVCY | 4182 | UNISTRQ_ | 4608 |
| TTRNTRIP | 3702 | POVL_VCY | 4190 | YRBUILT | 4609 |
| TTRNTRIC | 3712 | POVLEVPY | 4191 | YRBUILT_ | 4613 |
| TFAREP | 3722 | POVL_VPY | 4199 | INTEARNB | 4614 |
| TFAREC | 3732 | COOKING | 4200 | INTE_RNB | 4616 |
| TAIRFARP | 3742 | COOKING_ | 4202 | INTERNBX | 4617 |
| TAIRFARC | 3752 | PORCH | 4203 | INTE_NBX | 4623 |
| TOTHFARP | 3762 | PORCH_ | 4205 | FININCB | 4624 |

| Variable | Start Position | Variable | Start Position | Variable | Start Position |
|----------|----------------|----------|----------------|----------|----------------|
| FININCB_ | 4626 | FOOD_MPX | 4683 | ALIOTHB_ | 4736 |
| FININCBX | 4627 | FOODSMPB | 4684 | ALIOTHBX | 4737 |
| FINI_CBX | 4633 | FOOD_MPB | 4686 | ALIO_HBX | 4743 |
| PENSIONB | 4634 | FOODSPBX | 4687 | LUMPSUMB | 4744 |
| PENS_ONB | 4636 | FOOD_PBX | 4693 | LUMP_UMB | 4746 |
| PNSIONBX | 4637 | INCLOSAB | 4694 | LMPSUMBX | 4747 |
| PNSI_NBX | 4643 | INCL_SAB | 4696 | LMPS_MBX | 4753 |
| UNEMPLB | 4644 | INCLSABX | 4697 | SALEINCB | 4754 |
| UNEMPLB_ | 4646 | INCL_ABX | 4703 | SALE_NCB | 4756 |
| UNEMPLBX | 4647 | INCLOSBB | 4704 | SALINCBX | 4757 |
| UNEM_LBX | 4653 | INCL_SBB | 4706 | SALI_CBX | 4763 |
| COMPENSB | 4654 | INCLSBBX | 4707 | OTHRINCB | 4764 |
| COMP_NSB | 4656 | INCL_BBX | 4713 | OTHR_NCB | 4766 |
| COMPNSBX | 4657 | CHDLMPB | 4714 | OTRINCBX | 4767 |
| COMP_SBX | 4663 | CHDLMPB_ | 4716 | OTRI_CBX | 4773 |
| WELFAREB | 4664 | CHDLMPBX | 4717 | INCLASS2 | 4774 |
| WELF_REB | 4666 | CHDL_PBX | 4723 | INCL_SS2 | 4775 |
| WELFREBX | 4667 | CHDOTHB | 4724 | CUID | 4776 |
| WELF_EBX | 4673 | CHDOTHB_ | 4726 | INTERI | 4783 |
| FOODSMPQ | 4674 | CHDOTHBX | 4727 | | |
| FOOD_MPQ | 4676 | CHDO_HBX | 4733 | | |
| FOODSMPX | 4677 | ALIOTHB | 4734 | | |

B. MEMB FILE

| Variable | Start Position | Variable | Start Position | Variable | Start Position |
|----------|----------------|----------|----------------|----------|----------------|
| NEWID | 1 | INCOMEY_ | 123 | SLTAXX_ | 238 |
| AGE | 9 | INCORP | 124 | SOCRXX | 239 |
| AGE_ | 11 | INCORP_ | 125 | SOCRXX_ | 247 |
| AMTFED | 12 | INCWEEKQ | 126 | SS_RRQ | 248 |
| AMTFED_ | 20 | INCW_EKQ | 128 | SS_RRQ_ | 250 |
| ANFEDTX | 21 | INDRETX | 129 | SSIX | 251 |
| ANFEDTX_ | 29 | INDRETX_ | 139 | SSIX_ | 259 |
| ANGOVRTX | 30 | JSSDEDX | 140 | SSNORM | 260 |
| ANGO_RTX | 38 | JSSDEDX_ | 146 | SSNORM_ | 261 |
| ANPRVPNX | 39 | MARITAL | 147 | SALARYB | 262 |
| ANPR_PNX | 47 | MARITAL_ | 148 | SALARYB_ | 264 |
| ANRRDEDX | 48 | MEDICOV | 149 | SALARYBX | 265 |
| ANRR_EDX | 56 | MEDICOV_ | 150 | SALA_YBX | 271 |
| ANSLTX | 57 | MEMBNO | 151 | NONFARMB | 272 |
| ANSLTX_ | 65 | NFRMLOSS | 153 | NONF_RMB | 274 |
| ARM_FORC | 66 | NFRM_OSS | 154 | NONFRMBX | 275 |
| ARM_ORC | 67 | NONFARMX | 155 | NONF_MBX | 281 |
| CU_CODE | 68 | NONF_RMX | 165 | FARMINCB | 282 |
| CU_CODE_ | 69 | OCCUCODE | 166 | FARM_NCB | 284 |
| EARNER | 70 | OCCU_ODE | 168 | FRMINCBX | 285 |
| EARNER_ | 71 | ORIGINR | 169 | FRMI_CBX | 291 |
| EARNTYPE | 72 | PAYPERD | 170 | RRRETIRB | 292 |
| EARN_YPE | 73 | PAYPERD_ | 171 | RRRE_IRB | 294 |
| EDUCA | 74 | PRIVPENX | 172 | RRRETRBX | 295 |
| EDUCA_ | 76 | PRIV_ENX | 180 | RRRE_RBX | 301 |
| EMPLCONT | 77 | PWRKSTAT | 181 | SSIB | 302 |
| EMPL_ONT | 78 | PWRK_TAT | 182 | SSIB_ | 304 |
| FARMINCX | 79 | RACE | 183 | SSIBX | 305 |
| FARM_NCX | 89 | RACE_ | 184 | SSIBX_ | 311 |
| FARMLOSS | 90 | RRRDEDX | 185 | | |
| FARM_OSS | 91 | RRRDEDX_ | 193 | | |
| GOVRETX | 92 | RRRETIRX | 194 | | |
| GOVRETX_ | 100 | RRRE_IRX | 202 | | |
| GROSPAYX | 101 | SALARYX | 203 | | |
| GROS_AYX | 111 | SALARYX_ | 213 | | |
| IN_COLL | 112 | SCHMLWKQ | 214 | | |
| IN_COLL_ | 113 | SCHM_WKQ | 216 | | |
| INC_HRSQ | 114 | SCHMLWKX | 217 | | |
| INC_RSQ | 117 | SCHM_WKX | 220 | | |
| INCMEDCR | 118 | SEX | 221 | | |
| INCM_DCR | 119 | SEX_ | 222 | | |
| INCNONWK | 120 | SLFEMPSS | 223 | | |
| INCN_NWK | 121 | SLFE_PSS | 229 | | |
| INCOMEY | 122 | SLTAXX | 230 | | |

XVI. APPENDIX 5 -- PUBLICATIONS AND DATA RELEASES FROM THE CONSUMER EXPENDITURE SURVEY

A partial list of publications containing data from the CE program appears below. Bulletins may be purchased from the Chicago regional sales center, from the U.S. Government Printing Office, Washington D.C., 20402, or from National Technical Information Service, U.S. Department of Commerce, Springfield, Virginia 22161. To place a telephone order with National Technical Information Service, call (703)-487-4650, or for a rush order, call 1(800)-553-NTIS.

| | |
|---|--|
| Consumer Expenditures in 2002, (forthcoming 2004) | Consumer unit income and expenditures, integrated data from Diary and Interview Surveys, classified by consumer unit characteristics. 10 tables. |
| Consumer Expenditure Survey Anthology, Report 967 (2003) | A collection of analytical and methodological articles using Consumer Expenditure Survey data. |
| Consumer Expenditures in 2001, Report 966 (2003) | Consumer unit income and expenditures, integrated data from Diary and Interview Surveys, classified by consumer unit characteristics. 10 tables. Available on request (202)691-6900. |
| Consumer Expenditure Survey, 2000-2001, Report 969 (2003) | Consumer unit income and expenditures, integrated data from Interview and Diary Surveys, classified by consumer unit characteristics: one way and cross tabulations, relative and aggregate shares. 64 tables. |
| Consumer Expenditures in 2000, Report 958 (2002) | Consumer unit income and expenditures, integrated data from Diary and Interview Surveys, classified by consumer unit characteristics. 10 tables. Available on request (202)691-6900. |
| Consumer Expenditure Survey, 1998-99, Report 955 | Consumer unit income and expenditures, integrated data from Interview and Diary Surveys, classified by consumer unit characteristics: one way and cross tabulations, relative and aggregate shares. 64 tables. |
| Consumer Expenditures in 1999, Report 949 (2001) | Consumer unit income and expenditures, integrated data from Diary and Interview Surveys, classified by consumer unit characteristics. 10 tables. Available on request (202)691-6900. |
| Consumer Expenditures in 1998, Report 940 (2000) | Consumer unit income and expenditures, integrated data from Diary and Interview Surveys, classified by consumer unit characteristics. 10 tables. Available on request (202)691-6900. |

For information on the availability of prior publications, please contact us at (202)691-6900 or e-mail us at CEXinfo@bls.gov.

CONSUMER EXPENDITURE SURVEY DATA ON THE INTERNET

Commonly-requested CE data tables can be found on-line at <http://www.bls.gov/cex>. The following One and Two-year Tables of integrated Diary and Interview data are available under the [Tables Created by BLS](#) heading:

One Year Tables

Standard Tables from 1984-2000
Expenditure Shares Tables from 1998-2000
Aggregate Expenditure Shares Tables from 1998-2000

Two Year Tables

Cross-Tabulated Tables from 1986-2000
Metropolitan Statistical Area Tables from 1986-2000
Region Tables from 1998-2000
High Income Tables from 1998-2000
Multi-Year Tables for 1984-1992 and 1993-2000

FAX ON DEMAND - FAXSTAT

FAXSTAT contains information and data that may be faxed to users from a touch-tone phone 24 hours a day -- 7 days a week. To receive FAXSTAT transmissions dial (202) 691-7006 and follow the voice prompts. Consumer Expenditure Survey data that are accessible on FAXSTAT are for the most recent year available

PUBLIC-USE TAPES

Public-use microdata tapes for the Diary and Interview Surveys are available for single years from 1984 to 1995, and as two-year tapes for 1982-83 and 1980-81. Seven public-use tapes are available from the 1972-73 survey including Diary Survey – Detailed, Food Quantity, and Integrated Adjusted; Quarterly Interview Survey- Summary, Detailed, Inventory of Consumer Durables, and Quantity of Clothing and Household Textiles. Information about the tapes is available from the BLS national office. (See Section XVII. INQUIRIES, SUGGESTIONS, AND COMMENTS)

CD-ROMS

CE microdata on CD-Rom are available from the Bureau of Labor Statistics for 1972-73, 1980-81, 1990-91, 1992-93, and for each individual year from 1994-2001. The 1980-81 through 2000 releases contain Interview and Diary data, while the 1972-73 CD includes Interview data only. The 1980-81, and the 1990 files (of the 1990-91 CD) include selected EXPN data, while the 1991 files (from the 1990-91 CD) and the 1992-93 CD do not. In addition to the Interview and Diary data, the CDs from 1994-2001 include the complete collection of EXPN files. A 1984-94 “multi-year” CD that presents Interview FMYL file data is also available. In addition to the microdata, the CD’s also contain the same integrated Diary and Interview tabulated data (1984-present) that are found on the Consumer Expenditure Survey web site (<http://www.bls.gov/cex>).

STATE CODES ON DISKETTE

State codes from 1982 to 1993 are available on diskette for the Interview Survey. The diskettes contain the variables NEWID and STATE, thus enabling the microdata user to identify the states in which consumer units reside. Caution should be exercised when analysis is done by state, due to the composition of some PSUs. PSUs in some state border areas may not be unique to one state, but may contain CUs from two or more states. (See Section X.D. STATE IDENTIFIER.) Also, because of nondisclosure requirements STATE has been suppressed for some sampled CUs. (See Section IV.A. CU

CHARACTERISTICS AND INCOME FILE (FMLY.)) The state data diskettes are free and may be obtained by contacting the BLS national office. (See Section XVII. INQUIRIES, SUGGESTIONS, AND COMMENTS)

XVII. INQUIRIES, SUGGESTIONS, AND COMMENTS

If you have any questions, suggestions, or comments about the survey, the microdata, or its documentation, please call (202) 691-6900 or email cexinfo@bls.gov.

Written suggestions and comments should be forwarded to:

Division of Consumer Expenditure Surveys
Branch of Information and Analysis
Bureau of Labor Statistics, Room 3985
2 Massachusetts Ave. N.E.
Washington, DC. 20212-0001

The Bureau of Labor Statistics will use these responses in planning future releases of the microdata.