1998 CONSUMER EXPENDITURE INTERVIEW SURVEY
PUBLIC USE MICRODATA
DOCUMENTATION

May 17, 2000

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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, bulletins, articles in the Monthly Labor Review, and on diskettes. Tabulated CE data are also available on the Internet and by facsimile transmission (See Section XVI. APPENDIX 5). The microdata are available on compact disk-ROM (CD-ROM).

These microdata files present detailed expenditure and income data from the Interview component of the CE for 1998 and the first quarter of 1999. The Interview survey collects data on up to 95 percent of total household expenditures. The 1998 microdata include files created directly from the expenditure sections of the Interview survey (EXPN files). This is the fifth release in which the Interview and EXPN public use files are offered together as one product. Formerly a separate product, the EXPN files contain expenditure data and ancillary descriptive information, often not available on the 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 1998 from the Interview Survey, integrated with data from the Diary Survey, are published in *Consumer Expenditures in 1998, Report 940* (February 2000). 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, 1998."

II. CHANGES FROM THE 1997 MICRODATA FILES

1. The following are MTAB file PUBFLAG value changes beginning in Q19981.

UCC	New PUBFLAG values
190902	2
340520	2
280110	1
280120	1
280130	1
280220	1
320511	1
320512	1
320901	2
360120	1
360320	2
360340	1
410140	1
430110	2
430120	2
440120	2

440210	2
530412	1
620310	1
270310	1
610110	2
640420	1
650110	1
650210	1

2. Beginning with Q19991, the sample size has increased by approximately 50 percent.

III. FILE INFORMATION

Since the 1996 release, the CD-ROM has provided the microdata as SAS data sets or ASCII files. (1996 also marked the year for which microdata were no longer available on magnetic tape.)

The 1998 Interview release contains four groups of Interview data files (FMLY, MEMB, MTAB, and ITAB), 48 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 1998 through the first quarter of 1999. 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 48 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.

An Adobe Acrobat PDF version of this documentation can be found in the *X:\Document* folder of this CD-ROM. The PDF file is named *Intdoc98.pdf*. Adobe Acrobat Reader is required to read and print this file. The reader is provided in the *X:\Acroread* folder of the CD-ROM and can be loaded onto your system by following the guidelines in the *Readme.1st* file found in the root directory. Adobe Acrobat Reader is a shareware product.

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 48 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
UTB Section 4, Part B	Utilities and Fuels for Owned and Rented Properties - Screening Questions
UTC Section 4, Part C	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
EQD Section 7, Part D	Household Equipment Repairs, Service Contracts, and Furniture Repair and Reupholstering - Furniture Repair or Reupholstering
FRA Section 8, Part A	Home Furnishings and Related Household Items - Purchases
FRB Section 8, Part B	Home Furnishings and Related Household Items - Rental or Leasing 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 - Disposed 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	Miscellaneous Expenses
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:\INTRVW98\FMLYI981x.TXT (Interview FMLY file for first quarter, 1998)
X:\INTRVW98\MEMBI981x.TXT (Interview MEMB file for first quarter, 1998)
X:\INTRVW98\MTABI981x.TXT (Interview MTAB file for first quarter, 1998)
X:\INTRVW98\ITABI981x.TXT (Interview ITAB file for first quarter, 1998)
X:\INTRVW98\FMLYI982.TXT   (etc.)
X:\INTRVW98\MEMBI982.TXT
X:\INTRVW98\MTABI982.TXT
X:\INTRVW98\ITABI982.TXT
X:\INTRVW98\FMLYI983.TXT
X:\INTRVW98\MEMBI983.TXT
X:\INTRVW98\MTABI983.TXT
X:\INTRVW98\ITABI983.TXT
X:\INTRVW98\FMLYI984.TXT
X:\INTRVW98\MEMBI984.TXT
X:\INTRVW98\MTABI984.TXT
X:\INTRVW98\ITABI984.TXT
X:\INTRVW98\FMLYI991.TXT
X:\INTRVW98\MEMBI991.TXT
X:\INTRVW98\MTABI991.TXT
X:\INTRVW98\ITABI991.TXT
X:\INTRVW98\AGGI98.TXT
X:\INTRVW98\LABELI98.TXT
X:\INTRVW98\UCCI98.TXT
X:\INTRVW98\VEHI98.TXT
X:\EXPN98\APL98.TXT
X:\EXPN98\RNT98.TXT
X:\EXPN98\OPB98.TXT
X:\EXPN98\OPD98.TXT
X:\EXPN98\MOR98.TXT
X:\EXPN98\HEL98.TXT
X:\EXPN98\OPH98.TXT
X:\EXPN98\OPI98.TXT
X:\EXPN98\UTA98.TXT
X:\EXPN98\UTB98.TXT
X:\EXPN98\UTC98.TXT
X:\EXPN98\CRA98.TXT
X:\EXPN98\CRB98.TXT
X:\EXPN98\APA98.TXT
X:\EXPN98\APB98.TXT
X:\EXPN98\EQB98.TXT
X:\EXPN98\EQD98.TXT
X:\EXPN98\FRA98.TXT
X:\EXPN98\FRB98.TXT
X:\EXPN98\CLA98.TXT
X:\EXPN98\CLB98.TXT
X:\EXPN98\CLC98.TXT
X:\EXPN98\CLD98.TXT
X:\EXPN98\RTV98.TXT
X:\EXPN98\LSD98.TXT
X:\EXPN98\OVB98.TXT
X:\EXPN98\OVC98.TXT

X:\EXPN98\VEQ98.TXT
X:\EXPN98\VLR98.TXT
X:\EXPN98\VOT98.TXT
X:\EXPN98\INB98.TXT
X:\EXPN98\IHB98.TXT
X:\EXPN98\IHC98.TXT
X:\EXPN98\MDB98.TXT
X:\EXPN98\MDC98.TXT
X:\EXPN98\EDA98.TXT
X:\EXPN98\SUB98.TXT
X:\EXPN98\ENT98.TXT
X:\EXPN98\TRV98.TXT
X:\EXPN98\TRD98.TXT
X:\EXPN98\TRE98.TXT
X:\EXPN98\TRF98.TXT
X:\EXPN98\MIS98.TXT
X:\EXPN98\XPA98.TXT
X:\EXPN98\XPB98.TXT
X:\EXPN98\FN298.TXT
X:\EXPN98\FNA98.TXT
X:\EXPN98\FNB98.TXT

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

X:\INTRVW98\FMLI981x.sd2 (Interview FMLY file for first quarter, 1998)
X:\INTRVW98\MEMI981x.sd2 (Interview MEMB file for first quarter, 1998)
X:\INTRVW98\MTBI981x.sd2 (Interview MTAB file for first quarter, 1998)
X:\INTRVW98\ITBI981x.sd2 (Interview ITAB file for first quarter, 1998)
X:\INTRVW98\FMLI982.sd2   (etc.)
X:\INTRVW98\MEMI982.sd2
X:\INTRVW98\MTBI982.sd2
X:\INTRVW98\ITBI982.sd2
X:\INTRVW98\FMLI983.sd2
X:\INTRVW98\MEMI983.sd2
X:\INTRVW98\MTBI983.sd2
X:\INTRVW98\ITBI983.sd2
X:\INTRVW98\FMLI984.sd2
X:\INTRVW98\MEMI984.sd2
X:\INTRVW98\MTBI984.sd2
X:\INTRVW98\ITBI984.sd2
X:\INTRVW98\FMLI991.sd2
X:\INTRVW98\MEMI991.sd2
X:\INTRVW98\MTBI991.sd2
X:\INTRVW98\ITBI991.sd2
X:\INTRVW98\AGGI98.txt
X:\INTRVW98\LABELI98.txt
X:\INTRVW98\UCCI98.txt
X:\INTRVW98\VEHI98.txt
X:\EXPN98\APL98.sd2
X:\EXPN98\RNT98.sd2
X:\EXPN98\OPB98.sd2
X:\EXPN98\OPD98.sd2
X:\EXPN98\MOR98.sd2
X:\EXPN98\HEL98.sd2
X:\EXPN98\OPH98.sd2
X:\EXPN98\OPI98.sd2

X:\EXPN98\UTA98.sd2
X:\EXPN98\UTB98.sd2
X:\EXPN98\UTC98.sd2
X:\EXPN98\CRA98.sd2
X:\EXPN98\CRB98.sd2
X:\EXPN98\APA98.sd2
X:\EXPN98\APB98.sd2
X:\EXPN98\EQB98.sd2
X:\EXPN98\EQD98.sd2
X:\EXPN98\FRA98.sd2
X:\EXPN98\FRB98.sd2
X:\EXPN98\CLA98.sd2
X:\EXPN98\CLB98.sd2
X:\EXPN98\CLC98.sd2
X:\EXPN98\CLD98.sd2
X:\EXPN98\RTV98.sd2
X:\EXPN98\LSD98.sd2
X:\EXPN98\OVB98.sd2
X:\EXPN98\OVC98.sd2
X:\EXPN98\VEQ98.sd2
X:\EXPN98\VLR98.sd2
X:\EXPN98\VOT98.sd2
X:\EXPN98\INB98.sd2
X:\EXPN98\IHB98.sd2
X:\EXPN98\IHC98.sd2
X:\EXPN98\MDB98.sd2
X:\EXPN98\MDC98.sd2
X:\EXPN98\EDA98.sd2
X:\EXPN98\SUB98.sd2
X:\EXPN98\ENT98.sd2
X:\EXPN98\TRV98.sd2
X:\EXPN98\TRD98.sd2
X:\EXPN98\TRE98.sd2
X:\EXPN98\TRF98.sd2
X:\EXPN98\MIS98.sd2
X:\EXPN98\XPA98.sd2
X:\EXPN98\XPB98.sd2
X:\EXPN98\FN298.sd2
X:\EXPN98\FNA98.sd2
X:\EXPN98\FNB98.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):

ASCII data set	SAS data set	LRECL	Record Counts
FMLYI981X.TXT	FMLI981X.SD2	3461	5614
FMLYI982.TXT	FMLI982.SD2	3461	5467
FMLYI983.TXT	FMLI983.SD2	3461	5527
FMLYI984.TXT	FMLI984.SD2	3461	5569
FMLYI991.TXT	FMLI991.SD2	3461	7015

ASCII data set	SAS data set	LRECL	Record Counts
MEMBI981X.TXT	MEMI981X.SD2	261	14111
MEMBI982.TXT	MEMI982.SD2	261	13781
MEMBI983.TXT	MEMI983.SD2	261	13809
MEMBI984.TXT	MEMI984.SD2	261	13803
MEMBI991.TXT	MEMI991.SD2	261	17445
MTABI981X.TXT	MTBI981X.SD2	35	535319
MTABI982.TXT	MTBI982.SD2	35	488523
MTABI983.TXT	MTBI983.SD2	35	503079
MTABI984.TXT	MTBI984.SD2	35	504667
MTABI991.TXT	MTBI991.SD2	35	661414
ITABI981X.TXT	ITBI981X.SD2	35	292374
ITABI982.TXT	ITBI982.SD2	35	285732
ITABI983.TXT	ITBI983.SD2	35	286839
ITABI984.TXT	ITBI984.SD2	35	286020
ITABI991.TXT	ITBI991.SD2	35	360804
EXPN			
APL98.TXT	APL98.SD2	28	247981
RNT98.TXT	RNT98.SD2	94	10512
OPB98.TXT	OPB98.SD2	95	23139
OPD98.TXT	OPD98.SD2	64	109
MOR98.TXT	MOR98.SD2	194	12899
HEL98.TXT	HEL98.SD2	194	1394
OPH98.TXT	OPH98.SD2	66	1402
OPI98.TXT	OPI98.SD2	263	31603
UTA98.TXT	UTA98.SD2	44	107470
LSD98.TXT	LSD98.SD2	200	2078
OVB98.TXT	OVB98.SD2	302	54696
UTB98.TXT	UTB98.SD2	34	435
UTC98.TXT	UTC98.SD2	60	301062
CRA98.TXT	CRA98.SD2	38	859
CRB98.TXT	CRB98.SD2	219	10415
APA98.TXT	APA98.SD2	52	2484
APB98.TXT	APB98.SD2	43	31796
EQB98.TXT	EQB98.SD2	36	4241
EQD98.TXT	EQD98.SD2	30	309
FRA98.TXT	FRA98.SD2	36	34492
FRB98.TXT	FRB98.SD2	27	98
CLA98.TXT	CLA98.SD2	43	173480
CLB98.TXT	CLB98.SD2	43	25628
CLC98.TXT	CLC98.SD2	36	4208
CLD98.TXT	CLD98.SD2	36	3995
RTV98.TXT	RTV98.SD2	48	800
OVC98.TXT	OVC98.SD2	62	2211

ASCII data set	SAS data set	LRECL	Record Counts
VLR98.TXT	VLR98.SD2	32	12500
VOT98.TXT	VOT98.SD2	89	29193
INB98.TXT	INB98.SD2	115	92104
VEQ98.TXT	VEQ98.SD2	58	43818
IHB98.TXT	IHB98.SD2	55	33754
IHC98.TXT	IHC98.SD2	152	9738
MDB98.TXT	MDB98.SD2	38	82678
MDC98.TXT	MDC98.SD2	38	1823
EDA98.TXT	EDA98.SD2	50	26133
SUB98.TXT	SUB98.SD2	35	30491
ENT98.TXT	ENT98.SD2	119	21790
TRV98.TXT	TRV98.SD2	315	18000
TRD98.TXT	TRD98.SD2	36	32486
TRE98.TXT	TRE98.SD2	36	3079
TRF98.TXT	TRF98.SD2	85	262
MIS98.TXT	MIS98.SD2	36	85719
XPA98.TXT	XPA98.SD2	130	29192
XPB98.TXT	XPB98.SD2	150	29192
FN298.TXT	FN298.SD2	33	31380
FNA98.TXT	FNA98.SD2	42	8862
FNB98.TXT	FNB98.SD2	76	7387

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(Y983) indicates the variable is deleted starting with the data file of the third quarter of 1998.

*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. ***<u>CONSUMER UNIT (CU) CHARACTERISTICS AND INCOME FILE (FMLY</u>***)

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, 0000001 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)
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)

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	[R]32	Nevada
**06	California	[R]33	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	[RR]39	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
**20	Kansas
21	Kentucky
22	Louisiana
[R]*23	Maine
24	Maryland
25	Massachusetts
**26	Michigan
**27	Minnesota
**47	Tennessee
48	Texas
49	Utah
50	Vermont
**51	Virginia
**53	Washington
[R]54	West Virginia
55	Wisconsin

* 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 strata[1] 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 stratum[1] 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 strata[1].

[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 stratum[1].

[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 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	216	CHAR(1)
CUTE_URE		217	CHAR(1)
FAM_SIZE	Number of members in CU BLS derived	242	NUM(2)

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)
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. BLS derived	446	NUM(9,7)
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. *L BLS derived	3356	NUM (11,4)
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. BLS derived	3368	NUM (8,7)
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. BLS derived	3378	NUM (8,7)
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 BLS derived	3276	CHAR(1)
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 BLS derived	3278	CHAR(1)
POV_PY_		3279	CHAR(1)

CUINCOME	Total CU Income CODED 01 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 BLS derived	11	NUM(2)
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 5 Other 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 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 BLS derived	599	CHAR(1)
ORIGIN1_		600	CHAR(1)

EDUC_REF	Education of reference person CODED 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	233	CHAR(2)
EDUC0REF		235	CHAR(1)
AGE2	Age of spouse BLS derived	14	NUM(2)
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 18 Armed forces BLS derived	593	CHAR(2)
OCCU_OD1		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)
OCCEXPNX	During the past 12 months, what was the total amount of occupational expenses such as union dues, tools, uniforms, business or professional association dues, licenses or permits? S22F.S 1	584	NUM(8)
OCCE_PNX		592	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 + JFDSTMPA) *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 + JFDSTMPA). *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 from MEMB file for all CU members) BLS derived	388	NUM(8)
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 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 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 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? S22B 1a	791	NUM(8)
UNEMPLX_		799	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? S22B 1b	165	NUM(8)
COMP_NSX		173	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? S22B 1c	832	NUM(8)
WELF_REX		840	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? S22B 1d	497	NUM(8)
INTE_RNX		505	CHAR(1)
FININCX	During the past 12 months, what was the total amount of income from dividends, royalties, estates, or trusts received by ALL CU members? S22B 1e	322	NUM(8)
FININCX_		330	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? S22B 1f	624	NUM(8)
PENS_ONX		632	CHAR(1)
INCLOSSA	During the past 12 months, how much net income or loss was received from roomers or boarders? *L S22B 1g(1)	456	NUM(8)

INCL_SSA		464	CHAR(1)
INCLOSSB	During the past 12 months, how much net income or loss was received from payments from other rental units? *L S22B 1g(2)	465	NUM(8)
INCL_SSB		473	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? S22B 1h(2)	3329	NUM(8)
CHDOTHX_		3337	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? S22B 1i(2)	3338	NUM(8)
ALIOTHX_		3346	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? S22B 2c	615	NUM(8)
OTHR_NCX		623	CHAR(1)
JFDSTMPA	Annual value of Food Stamps received BLS derived	506	NUM(8)
JFDS_MPA		514	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 + SALEINCX + SSOVERPX + INSRFNDX + PTAXRFDX + CHDLMPX) 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? S22B 2a	527	NUM(8)
LUMP_UMX		535	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? S22B 1h(1)	3347	NUM(8)
CHDLMPX_		3355	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? S22B 2b	687	NUM(8)
SALE_NCX		695	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? S22B 3c	761	NUM(8)
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? S22B 3d	488	NUM(8)
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? S22B 3e	643	NUM(8)
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? S22B 4a	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? S22B 3a	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? S22B 4b	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? S22B 3b	751	NUM(8)
SLRF_NDX		759	CHAR(1)
TAXPROPX	During the past 12 months, what was the total amount PAID for personal property taxes not reported elsewhere by ALL CU members? S22B 4c	772	NUM(8)
TAXP_OPX		780	CHAR(1)
MISCTAXX	During the past 12 months, what was the total amount PAID for other taxes not reported elsewhere by ALL CU members? S22B 4d	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? S22B 3f	606	NUM(8)
OTHR_NDX		614	CHAR(1)

h. ***<u>RETIREMENT AND PENSION DEDUCTIONS</u>***

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)

i. ***CONTRIBUTIONS***

VARIABLE	ITEM DESCRIPTION	START POSITION	FORMAT
CSHCNTBX	During the past 12 months, how much were cash contributions for support of persons not in the CU, including alimony, child support, and students living away at college, made by you (or any members of your CU)? S22F.S 2a	207	NUM(8)
CSHC_TBX		215	CHAR(1)
ALIMOX	How much of the amount of cash contributions was for alimony? S22F.S 2a(1)	17	NUM(8)
ALIMOX_		25	CHAR(1)

CHLDSUPX	How much of the amount of cash contributions was for child support?	76	NUM(8)
	S22F.S 2a(2)		
CHLD_UPX		84	CHAR(1)
COLLEXPX	How much of the amount of cash contributions was for the expenses of college or university students while attending school away from home?	134	NUM(8)
	S22F.S 2a(3)		
COLL_XPX		142	CHAR(1)
CBSGFTX	During the past 12 months, how much were gifts of cash, bonds, or stocks to persons not in the CU made by you (or any members of your CU)?	67	NUM(8)
	S22F.S 2b		
CBSGFTX_		75	CHAR(1)
CNTRCHRX	During the past 12 months, how much were contributions to charities, such as United Way, Red Cross, etc., made by you (or any members of your CU)?	107	NUM(8)
	S22F.S 2c		
CNTR_HRX		115	CHAR(1)
CNTRELGX	During the past 12 months, how much were contributions to church or other religious organizations, excluding parochial school expenses, made by you (or any members of your CU)?	116	NUM(8)
	S22F.S 2d		
CNTR_LGX		124	CHAR(1)
CNTEDORX	During the past 12 months, how much were contributions to educational organizations made by you (or any members of your CU)?	98	NUM(8)
	S22F.S 2e		
CNTE_ORX		106	CHAR(1)
CNTRPOLX	During the past 12 months, how much were political contributions made by you (or any members of your CU)?	125	NUM(8)
	S22F.S 2f		
CNTR_OLX		133	CHAR(1)

MISCNTRX	During the past 12 months, how much were other contributions made by you (or any members of your CU)? S22F.S 2g	538	NUM(8)
MISC_TRX		546	CHAR(1)

j. *FINANCIAL INFORMATION*

VARIABLE	ITEM DESCRIPTION	START POSITION	FORMAT
SAVACCTX	On the last day of *(last month)*, 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 (*last month)* compare with the amount your CU had on the last day of *(last month, one year ago)* 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 *(last month)*, what was the total amount your CU had in checking accounts, brokerage accounts and other similar accounts? *L 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 (*last month)* compare with the amount your CU had on the last day of *(last month, one year ago)* 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 *(last month)*, 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 (*last month)* compare with the amount your CU had on the last day of *(last month, one year ago)* 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 *(last month)*? 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 *(last month, one year ago)*? 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 S22G.S 3c	198	NUM(8)
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)? S22G.S 4	654	NUM(8)
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)? S22G.S 5	718	NUM(10)
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? S22G.S 6	50	NUM(10)
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? S22G.S 7	812	NUM(10)
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? S22G.S 8b	823	NUM(8)

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 *(last month, one year ago)*? S22G.S 10	547	NUM(8)
MONY_WDX		555	CHAR(1)
COMPOWD	How does the amount owed to your CU on the last day of (*last month)* compare with the amount owed to your CU by persons outside your CU on the last day of *(last month, one year ago)*? 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 1	61	CHAR(2)
BUIL_ING		63	CHAR(1)
LOT_SIZE	What is the approximate size of the lot on which this unit is located? CODED 01 1/16 acre – 2,722 sq. ft. 02 1/8 acre – 5,445 sq. ft. 03 1/4 acre – 10,890 sq. ft. 04 1/2 acre – 21,780 sq. ft. 05 3/4 acre – 32,670 sq. ft. 06 1 acre – 43,560 sq. ft. 07 2 acres – 87,120 sq. ft. 08 3 to 5 acres 09 6 to 10 acres 10 Greater than 10 acres 11 No lot S01B 2	524	CHAR(2)
LOT__IZE		526	CHAR(1)

BUILT	About when was this building originally built? CODED 01 1990 or later 02 1985-1989 03 1980-1984 04 1975-1979 05 1970-1974 06 1965-1969 07 1960-1964 08 1955-1959 09 1950-1954 10 1945-1949 11 1940-1944 12 1930-1939 13 1920-1929 14 1910-1919 15 1900-1909 16 Before 1900 x Don't know S01B 10	64	CHAR(2)
BUILT_		66	CHAR(1)
ST_HOUS	Are these living quarters presently used as student housing by a college or university? CODED 1 Yes 2 No S01D 2	770	CHAR(1)
ST_HOUS_		771	CHAR(1)
CLLGEQTR	Which best describes these college or university regulated living quarters? CODED 1 Student dormitory 2 Fraternity 3 Sorority 4 Housing for married students 5 Other housing regulated by a college or university S01D 3	96	CHAR(1)
CLLG_QTR		97	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 S01D 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 S01D 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 3	683	NUM(3)
ROOMSQ_		686	CHAR(1)
BEDROOMQ	How many bedrooms are there in this unit? S01B 4	45	NUM(3)
BEDR_OMQ		48	CHAR(1)
BATHRMQ	How many complete bathrooms are there in this unit? S01B 5a	41	NUM(3)
BATHRMQ_		44	CHAR(1)
HLFBATHQ	How many half bathrooms are there in this unit? S01B 5b	423	NUM(3)
HLFB_THQ		426	CHAR(1)
HEATFUEL	What fuel is used most for heating this unit? CODED 1 Gas (underground pipes) 3 Electricity 4 Fuel oil 9 Other S01B 6	3292	CHAR(2)

HEAT_UEL		3294	CHAR(1)
WATERHT	What fuel is used for heating water in this unit? CODED 1 Gas (underground pipes) 3 Electricity 4 Fuel oil 9 Other S01B 7	3307	CHAR(2)
WATERHT_		3309	CHAR(1)
GAS	What fuel is used for cooking? CODED 01 Gas (underground pipes) S01B 8	418	CHAR(2)
GAS_		420	CHAR(1)
ELECCOOK	See GAS for question and source. CODED 03 Electricity	239	CHAR(2)
ELEC_OOK		241	CHAR(1)
FUEL_OIL	See GAS for question and source. CODED 04 Fuel oil	415	CHAR(2)
FUEL0OIL		417	CHAR(1)
OTH_COOK	See GAS for question and source. CODED 09 Other fuel	603	CHAR(2)
OTH__OOK		605	CHAR(1)
NO_FUEL	See GAS for question and source. CODED 10 No fuel used	569	CHAR(2)
NO_FUEL_		571	CHAR(1)
DONTKNOW	See GAS for question and source. CODED X Don't Know	218	CHAR(2)
DONT_NOW		220	CHAR(1)

SWIMPOOL	Does this unit have any of the following? CODED 01 Swimming pool S01B 9	3298	CHAR(2)
SWIM_OOL		3300	CHAR(1)
TENNISCT	See SWIMPOOL for question and source. CODED 02 Tennis court	3301	CHAR(2)
TENN_SCT		3303	CHAR(1)
BARN	See SWIMPOOL for question and source. CODED 03 Barn or stable	3280	CHAR(2)
BARN_		3282	CHAR(1)
GREENHSE	See SWIMPOOL for question and source. CODED 04 Greenhouse	3286	CHAR(2)
GREE_HSE		3288	CHAR(1)
GUESTHSE	See SWIMPOOL for question and source. CODED 05 Guesthouse or separate servant's quarters	3289	CHAR(2)
GUES_HSE		3291	CHAR(1)
ENCPORCH	See SWIMPOOL for question and source. CODED 06 Enclosed porch	3283	CHAR(2)
ENCP_RCH		3285	CHAR(1)
TERRACE	See SWIMPOOL for question and source. CODED 07 Terrace	3304	CHAR(2)
TERRACE_		3306	CHAR(1)
PATIO	See SWIMPOOL for question and source. CODED 08 Patio or balcony	3295	CHAR(2)
PATIO_		3297	CHAR(1)
APTMENT	See SWIMPOOL for question and source. CODED 09 Apartment	3310	CHAR(2)
APTMENT_		3312	CHAR(1)

OFSTPARK	See SWIMPOOL for question and source. CODED 10 Off street parking	3313	CHAR(2)
OFST_ARK		3315	CHAR(1)
WINDOWAC	See SWIMPOOL for question and source. CODED 11 Window air conditioning	3316	CHAR(2)
WIND_WAC		3318	CHAR(1)
CNTRALAC	See SWIMPOOL for question and source. CODED 12 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*

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, ^{N981}<UCC> or ^{D981}<UCC> identifies an addition or deletion of a given UCC to the summary expenditure variable beginning in Q981.

<u>PLEASE NOTE THE FOLLOWING</u>:

During the CU’s fifth interview, respondents are asked to provide annual (not quarterly) expenditure amounts for cash contributions, occupational expenses, and finance charges (excluding auto loans and home mortgages) in the questionnaire’s annual supplement. These data are mapped to a quarterly time frame and are assigned to UCCs 710110, 800801, 800810, 800820, 800830, 800840, 800850, 800860, and 900001. There are no values for these UCCs for CUs in their second through fourth interviews. These UCCs are components of CASHCOPQ(CQ) (800801 800810 800820 800830 800840 800850 800860) and MISC2PQ(CQ) (710110 900001).

CASHCOPQ(CQ) requires some modification depending on the type of analysis performed. If the intent is to analyze the behavior of cash giving, only fifth interview families should be selected for the analysis. If population or sample estimates such as expenditure means are desired, CASHCOPQ(CQ) needs to be multiplied by 4 to approximate values for those CUs that are not in their fifth interview.

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 MISCX4CQ(PQ) and TOTEX4PQ(CQ) overestimate the values of CASHCOPQ(CQ) and 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 (*To be used for population estimates - see information under Summary Expenditure Data heading.*) TOTEXPPQ - MISCPQ - CASHCOPQ + MISC1PQ + 4*(MISC2PQ + CASHCOPQ)	3387	NUM(12,4)
TOTEX4CQ	Adjusted total expenditures this quarter collected in Interview Survey (*To be used for population estimates - see information under Summary Expenditure Data heading.*) same composition as above	3399	NUM(12,4)
NOTE:	**TOTEXPPQ, *TOTEXPCQ, *TOTEX4PQ, and *TOTEX4CQ, totals exclude items which are only collected in the Diary Survey. See Section VIII for a further explanation.*		
FOODPQ	Total food last quarter FDHOMEPQ + FDAWAYPQ	1349	NUM(12,4)
FOODCQ	Total food this quarter	1361	NUM(12,4)

	same composition as above		
FDHOMEPQ	Food at home last quarter 190904 790220 790230	1373	NUM(12,4)
FDHOMECQ	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 220111 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 990910 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 220112 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	1745	NUM(12,4)

	same composition as above		
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	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	1961	NUM(12,4)

	same composition as above		
DMSXCCPQ	Domestic services excluding child care last quarter 340310 340410 340420 340520 340530 340903 340906 340910 340914	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	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 230131 230132 320110 320161 320162	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 same UCCs as above	2201	NUM(12,4)
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	2333	NUM(12,4)

	380510 380901 380902 380903		
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 same UCCs as above	2393	NUM(12,4)
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 + VEHFINPQ + 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)
VEHFINPQ	Vehicle finance charges last quarter 510110 510901 510902 850300	2573	NUM(12,4)
VEHFINCQ	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 490212 490221 490231 490232 490311 490312 490313 490314 490318 490319 490411 490412 490413 490501 490502 490900	2597	NUM(12,4)
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 520110 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	2741	NUM(12,4)

	HLTHINPQ + MEDSRVPQ + PREDRGPQ + MEDSUPPQ		
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 570210 570220 570230 570240	2789	NUM(12,4)
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)
FEEADMCQ	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 310312 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 620330 620905 620906 620908 620909 620919 620921 620922	2981	NUM(12,4)
OTHENTCQ	Other entertainment this quarter same UCCs as above	2993	NUM(12,4)
PERSCAPQ	Personal care last quarter 640130 640420 650110 650210 650900	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 (*To be used for population estimates - see information under Summary Expenditure Data heading.*)	3411	NUM(12,4)

	MISC1PQ + (4*MISC2PQ)		
MISCX4CQ	Adjusted miscellaneous expenditures this quarter (*To be used for population estimates - see information under Summary Expenditure Data heading.*) same composition as above	3423	NUM(12,4)
MISC1PQ	Miscellaneous expenditures last quarter (data collected in all interviews) 620112 680110 680140 680210 680220 680901 680902 790600 880210	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 900001	3149	NUM(12,4)
MISC2CQ	Miscellaneous expenditures this quarter (data collected only in fifth interview) same UCCs as above *NOTE: See important information about the miscellaneous expenditure variables under the SUMMARY EXPENDITURE DATA heading prior to this list of variables.*	3161	NUM(12,4)
CASHCOPQ	Cash contributions last quarter 800801 800810 800820 800830 800840 800850 800860	3173	NUM(12,4)
CASHCOCQ	Cash contributions this quarter same UCCs as above *NOTE: See important information about the cash contributions variables under the SUMMARY EXPENDITURE DATA heading prior to this list of variables.*	3185	NUM(12,4)
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)

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, 0000001 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 *(reference person)*? 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 5 Other 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? 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	169	CHAR(1)

Control Card 26

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

Control Card 28a

EDUCA_		76	CHAR(1)
IN_COLL	Is the member currently enrolled in a college or university either . . .? CODED 1 Full time	112	CHAR(1)

	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 1 Yes 2 No Control Card 29	66	CHAR(1)
ARM__ORC		67	CHAR(1)
EARNER	Does member earn income? CODED 1 Yes, member earns income. 2 No, member does not earn income. BLS derived	70	CHAR(1)
EARNER_		71	CHAR(1)
EARNTYPE	Type of earner CODED 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	72	CHAR(1)
EARN_YPE		73	CHAR(1)
SCHMLWKQ	How many weeks did the member purchase meals at school? S20A 10b (d)	214	NUM(2)
SCHM_WKQ		216	CHAR(1)
SCHMLWKX	What is the usual WEEKLY expense for the meals the member purchased at school? S20A 10b (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. CODED 1 Yes 2 No S22A-E 4b	124	CHAR(1)
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.) CODED 1 Salaried 2 Self-employed 3 Working without pay BLS derived	181	CHAR(1)
PWRK_TAT		182	CHAR(1)
INCNONWK	What was the main reason the member did not work during the past 12 months? Was the member . . .? 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	120	CHAR(1)
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)
GROSPAYX	What was the gross amount of the member’s last pay? S22A-E 9	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 S22A-E 9	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 S22A-E 6b	155	NUM(10)
NONF_RMX		165	CHAR(1)
NFRMLOSS	Was there a loss from the member’s own nonfarm business, partnership, or professional practice? CODED 3 Loss S22A-E 6b	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 S22A-E 6c	79	NUM(10)

FARM_NCX		89	CHAR(1)
FARMLOSS	Was there a loss from the member's own farm? CODED 3 Loss S22A-E 6c	90	CHAR(1)
FARM_OSS		91	CHAR(1)
SOCRRX	Amount of Social Security and Railroad Retirement income received by member in past 12 months BLS derived	239	NUM(8)
SOCRRX_		247	CHAR(1)
RRRETIRX	What was the amount of the last Social Security or Railroad Retirement payment received? (In past 12 months) S22A-E 7d	194	NUM(8)
RRRE_IRX		202	CHAR(1)
INCMEDCR	Is the amount of the last Social Security or Railroad Retirement payment received AFTER the deduction for a Medicare premium? CODED 1 Yes 2 No S22A-E 7e	118	CHAR(1)
INCM_DCR		119	CHAR(1)
SS_RRQ	During the past 12 months, how many Social Security or Railroad Retirement payments did the member receive? S22A-E 7f	248	NUM(2)
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) S22A-E 8b	251	NUM(8)
SSIX_		259	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) BLS derived	21	NUM(8)
ANFEDTX_		29	CHAR(1)
AMTFED	How much was deducted from the member's last pay for Federal income tax? S22A-E 10a	12	NUM(8)
AMTFED_		20	CHAR(1)
ANSLTX	Annualized amount of state and local income taxes deducted from last pay ((SLTAXX/GROSPAYX x SALARYX) BLS derived	57	NUM(8)
ANSLTX_		65	CHAR(1)
SLTAXX	How much was deducted from the member's last pay for state and local income tax? S22A-E 10b	230	NUM(8)
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 1 Yes 2 No S22A-E 10g	260	CHAR(1)
SSNORM_		261	CHAR(1)
JSSDEDX	Estimated amount of income contributed to Social Security by member in past 12 months BLS derived	140	NUM(6)
JSSDEDX_		146	CHAR(1)

MEDICOV	Does the money deducted for Social Security cover only the Medicare portion of Social Security? CODED 1 Yes 2 No S22A-E 11	149	CHAR(1)
MEDICOV_		150	CHAR(1)
SLFEMPSS	Amount of income contributed to Social Security by member if self-employed BLS derived	223	NUM(6)
SLFE_PSS		229	CHAR(1)
ANRRDEDX	Annualized amount of Railroad Retirement deducted from last pay ((RRRDEDX/GROSPAYX x SALARYX) BLS derived	48	NUM(8)
ANRR_EDX		56	CHAR(1)
RRRDEDX	How much was deducted from the member's last pay for Railroad Retirement? S22A-E 10d	185	NUM(8)
RRRDEDX_		193	CHAR(1)
ANGOVRTX	Annualized amount of Government Retirement deducted from last pay ((GOVRETX/GROSPAYX x SALARYX) BLS derived	30	NUM(8)
ANGO_RTX		38	CHAR(1)
GOVRETX	How much was deducted from the member's last pay for Government Retirement? S22A-E 10e	92	NUM(8)
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?	172	NUM(8)

	S22A-E 10f		
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	77	CHAR(1)
	S22A-E 12		
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)	129	NUM(10)
	S22A-E 13b		
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	CU identification number. Digits 1-7 (CU sequence number, 0000001 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)
UCC	Universal Classification Code See Section XIII.A. for a listing of MTAB UCC codes and titles. BLS derived	9	CHAR(6)
COST	Cost *L BLS derived	15	NUM(12,4)
COST_	Cost flag CODED Computation Status of Cost: T Topcoded 0 No change 1 One of the source fields was flagged by Census 2 Manually updated 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 BLS derived	27	CHAR(1)
GIFT	Was item bought for someone outside the CU? CODED 1 Yes 2 No BLS derived	28	CHAR(1)
PUBFLAG	Is cost included in published bulletin? CODED 1 Not published	29	CHAR(1)

	2 Published in Integrated Bulletin		
	BLS derived		
REF_MO	Reference month of this expenditure	30	CHAR(2)
	BLS derived		
REF_YR	Reference year of this expenditure	32	CHAR(4)
	BLS derived		

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 cash contributions for support to persons not in the CU 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 800801. 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	800810
001010	800820
001210	800830
001220	800840
002010	800850
002020	800860
002030	900001
003000	920010
003100	920020
800801	920030
800802	920040

UCCs, 800801, 800810-800860, and 900001 are used to calculate total expenditures in CE publications. These UCCs are not included when calculating total expenditures for creating the FMLY variable ERANKMTH, which is used for expenditure ranking, because including these UCCs would increase total expenditures of only CUs asked these questions, resulting in misleading rankings. For the summary variables in the FMLY file, these UCCs were included, but not multiplied by 4.

VARIABLE	ITEM DESCRIPTION	START POSITION	FORMAT
NEWID	CU identification number. Digits 1-7 (CU sequence number, 0000001 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 19981 1998, 1st quarter 19982 1998, 2nd quarter 19983 1998, 3rd quarter 19984 1998, 4th quarter 19991 1999, 1st quarter BLS derived	1	CHAR(5)
NEWID	CU identification number. Digits 1-7 (CU sequence number, 0000001 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 Computers, not solely for games 14 Sound components, component systems, or compact disc sound systems 15 Video tape recorder, video disc player, or video cassette recorders (VCR's) 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)
APPLSTAT	Appliance status CODED 1 Purchased for own use 2 Included with own house 3 Received as a gift 4 Included with rental unit 5 Rented separately S01C col. c	27	CHAR(1)
APPL_TAT		28	CHAR(1)

b. ***<u>SECTION 2 RENTED LIVING QUARTERS (RNT)</u>***

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 *(month, 3 months ago)*, 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 1 Yes 2 No S02A/B 2d/1d	29	CHAR(1)
RTPMTRG_		30	CHAR(1)
RTCREXP	Were any payments made during the current month? CODED 1 Yes 2 No S02A/B 2f/1f	31	CHAR(1)
RTCREXP_		32	CHAR(1)
RTELECT	Does the rental payment include the cost of electricity? CODED	33	CHAR(1)

	1 Yes 2 No S02A/B 3a/2a		
RTELECT_		34	CHAR(1)
RTGAS	Does the rental payment include the cost of gas? CODED 1 Yes 2 No S02A/B 3b/2b	35	CHAR(1)
RTGAS_		36	CHAR(1)
RTWATER	Does the rental payment include the cost of piped-in water? CODED 1 Yes 2 No S02A/B 3c/2c	37	CHAR(1)
RTWATER_		38	CHAR(1)
RTHEAT	Does the rental payment include the cost of heating? CODED 1 Yes 2 No S02A/B 3d/2d	39	CHAR(1)
RTHEAT_		40	CHAR(1)
RTTRASH	Does the rental payment include the cost of trash/garbage collection? CODED 1 Yes 2 No S02A/B 3e/2e	41	CHAR(1)
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 *(month, 3 months ago)*? CODED 1 Yes 2 No S02A/B 4a/5a	43	CHAR(1)
RTASPAY_		44	CHAR(1)
RTCOMPX	What is the rental charge to another tenant for a similar unit?	45	NUM(6)

	S02A/B 4b/5b		
RTCOMPX_		51	CHAR(1)
RTCMPPD	What period of time does this charge cover? CODED 4 Month 9 Other S02A/B 4c/5c	52	CHAR(1)
RTCMPPD_		53	CHAR(1)
RTPKG	Is there an extra charge for garage or parking facilities for this unit? CODED 1 Yes 2 No S02A/B 5a/3a	54	CHAR(1)
RTPKG_		55	CHAR(1)
RTPKGPD	What period of time does this extra charge cover? CODED 4 Month 9 Other S02A/B 5c/3c	56	CHAR(1)
RTPKGPD_		57	CHAR(1)
RTPKGQ	Since the 1st of *(month, 3 months ago)*, how many payments have been made for garage or parking facilities? S02A/B 5d/3d	58	NUM(3)
RTPKGQ_		61	CHAR(1)
RTBSNSZ	What percent of the rental payment is counted as a business expense? S02A/B 6b/4b	62	NUM(4,2)
RTBSNSZ_		66	CHAR(1)
QPK3MCMX	Total paid for parking in reference period Census derived	67	NUM(9,2)
QPK3_CMX		76	CHAR(1)
JRTPAYQV	Quarterly value of rent received as pay	77	NUM(8)

	BLS derived		
JRTP_YQV		85	CHAR(1)
QRT3MCMX	Total rental payments made in reference period, adjusted for business and rooms rented to others	86	NUM(8)
	Census derived		
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	21	CHAR(2)
	S03B 1a		
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	24	CHAR(3)
	S03B 1b		
OWNYB_		27	CHAR(1)
OBSNSZB	What percent of the expenses are deducted as business, farm or rental expenses?	28	NUM(4,2)
	S03B 2b		
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	33	CHAR(1)
	S03B 10		

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) S03B 3a	38	CHAR(4)
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 S03B 4	43	CHAR(1)
ACQMETH_		44	CHAR(1)
OWN_PURX	Not including closing costs, what was the total price paid for the property? S03B 5	45	NUM(8)
OWN__URX		53	CHAR(1)
OWNDPMTX	What was the amount of the down payment? S03B 6	54	NUM(8)
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.) S03B 7	63	NUM(8)
CLOS_CST		71	CHAR(1)
PROPVALX	About how much do you think this property would sell for on today's market? S03B 8	72	NUM(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 S03B 12	81	CHAR(1)
VSHARED_		82	CHAR(1)
VTIMESHR	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 each year? (OWNYB = 300 only) CODED 1 Share ownership for entire year 2 Time-sharing arrangement S03B 13	83	CHAR(1)
VTIM_SHR		84	CHAR(1)
QADPTAX	Amount of annual property taxes, adjusted for business, farm, and rental expenses Census derived	85	NUM(10)
QADPTAX_		95	CHAR(1)

d. ***<u>SECTION 3 OWNED LIVING QUARTERS AND OTHER OWNED REAL ESTATE</u>***

<u>PART D Disposed of Property (OPD)</u>

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 S03D 1a	21	CHAR(2)
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 S03D 1b	24	CHAR(3)

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 S03D 2	28	CHAR(1)
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)
TRUSTX	What was the amount of the mortgage you (your CU) financed (for the buyer)? S03D 6b	48	NUM(8)
TRUSTX_		56	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)
QMRTTERM	Length of mortgage in years BLS derived	49	NUM(3)
QMRT_ERM		52	CHAR(1)
MRTPMTX	On your (your CU's) last regular payment, what was the total amount you paid for those things? (See PAYPROTX for	53	NUM(8)

	items that were included in payment. BLS mortgage edit converts all payments to monthly basis.) S03F 11		
MRTPMTX_		61	CHAR(1)
MRTPMPD	How often are (were) mortgage payments due? (See NOTE under MRTPMTX.) CODED 3 Monthly S03F 9	62	CHAR(1)
MRTPMPD_		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. CODED 3 Property insurance	66	CHAR(1)
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	83	NUM(8)

	BLS derived		
QPRI_M1X		91	CHAR(1)
QPRINM2X	Amount of principal paid during second month of reference period	92	NUM(8)
	BLS derived		
QPRI_M2X		100	CHAR(1)
QPRINM3X	Amount of principal paid during third month of reference period	101	NUM(8)
	BLS derived		
QPRI_M3X		109	CHAR(1)
QADINT1X	Amount of interest paid during first month of reference period, adjusted for business	110	NUM(8)
	BLS derived		
QADI_T1X		118	CHAR(1)
QADINT2X	Amount of interest paid during second month of reference period, adjusted for business	119	NUM(8)
	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)
FRSTPYYR	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 S03F 6a	152	CHAR(1)
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 Reverse annuity 7 Other S03F 6b	154	CHAR(1)
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)
ORGMRTG	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)
ORGMRTG_		48	CHAR(1)
QMRTTRMG	Length of home equity loan in years BLS derived	49	NUM(3)
QMRT_RMG		52	CHAR(1)
MRTPMTG	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.) S03G 11	53	NUM(8)
MRTPMTG_		61	CHAR(1)
MRTPMPG	How often are loan payments due? (See NOTE under MRTPMTG) CODED 3 Monthly S03G 9	62	CHAR(1)
MRTPMPG_		63	CHAR(1)
PAYPRTXG	On your (your CU's) last regular payment, which of these things were included? CODED 2 Property taxes S03G 10	64	CHAR(1)
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	70	CHAR(1)

	5 Mortgage guarantee insurance		
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 BLS derived	74	NUM(8)
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 Reverse annuity 7 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	24	CHAR(3)

	400 Unimproved land with no buildings on it 500 Other property S03H 1b		
OWNYH_		27	CHAR(1)
PAIDLOAN	Since the 1st of *(last month)*, have you made any payments for this line of credit home equity loan? CODED 1 Yes 2 No S03H 2	28	CHAR(1)
PAID_OAN		29	CHAR(1)
PRINAMTX	Prior to the last payment, what was the total amount owed? S03H 4	30	NUM(8)
PRIN_MTX		38	CHAR(1)
PRIMPLUS	Interest rate used in calculation of JINTPDX (Equal to prime rate plus 1.5 percentage points) BLS derived	39	NUM(6,4)
PRIM_LUS		45	CHAR(1)
JINTPDX	Estimated amount of interest paid on loan during reference period BLS derived	46	NUM(8)
JINTPDX_		54	CHAR(1)
JLCPRINX	Estimated amount of principal paid on loan during reference period *L BLS derived	55	NUM(8)
JLCP_INX		63	CHAR(1)
LOAN_NOH	Loan number S03H 1d	64	CHAR(2)
LOAN0NOH		66	CHAR(1)

H. ***<u>SECTION 3 OWNED LIVING QUARTERS AND OTHER OWNED REAL ESTATE</u>***

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 S03I 1a	21	CHAR(2)
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,	60	NUM(8)

	adjusted for business Census derived		
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 *(month, 3 months ago)*, 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	81	CHAR(2)

	03 Property insurance		
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	108	CHAR(2)

	association? (TYPEPROP = 1 or 3 only) CODED 21 Management S03I 9		
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. CODED 23 Improvements	114	CHAR(2)
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 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	141	CHAR(5)
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 S03I 10a	147	CHAR(1)
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	182	CHAR(2)

29 Medical services
30 Trash collection
31 Other

S03I 11b

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 COOPSPnn 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 Census derived	239	NUM(8)
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 Census derived	248	NUM(8)
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? S03I 13	257	NUM(6)
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
UTLPROPI	What property(ies) was (were) the telephone bills for? CODED 01-20 Property number (PROP_NOB from Section 3, Part B) 96 Mobile (car) phone 97 Rented sample unit 98 Other rented unit 99 Property not owned or rented by CU S04A 2	21	CHAR(2)
UTLP_OPI		23	CHAR(1)
TELMO	In what month was the bill received? S04A 5b	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)
TELBASIC	Does the total amount of the bill include a basic service charge? CODED 1 Yes 2 No S04A 6a	32	CHAR(1)
TELB_SIC		33	CHAR(1)
TELNGDIS	Does the total amount of the bill include long distance call charges? CODED 1 Yes 2 No S04A 6b	34	CHAR(1)
TELN_DIS		35	CHAR(1)
TELEQPUR	Does the total amount of the bill include equipment purchases such as the purchase of a telephone?	36	CHAR(1)

	CODED 1 Yes 2 No S04A 6c		
TELE_PUR		37	CHAR(1)
QADBILLX	Total amount of telephone bill, adjusted for business Census derived	38	NUM(6)
QADB_LLX		44	CHAR(1)

J. ***<u>SECTION 4 UTILITIES AND FUELS FOR OWNED AND RENTED PROPERTIES</u>***

<u>PART B Screening Questions (UTB)</u>

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 310 Combined electric/water/sewerage S04B 2b	21	CHAR(3)

VACUTLY_		24	CHAR(1)
VACUTMO	In what month was the bill received? S04B 2c	25	CHAR(2)
VACUTMO_		27	CHAR(1)
VACUTLX	What was the total amount of the charges? S04B 2d	28	NUM(6)
VACUTLX_		34	CHAR(1)

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

PART C 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 310 Combined electric/water/sewerage S04C 1a	21	CHAR(3)

UTILY_		24	CHAR(1)
WHATPROP	What property were the charges for? 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 S04C 2	25	CHAR(2)
WHAT_ROP		27	CHAR(1)
BLPERIOD	What period of time was covered by the bill? CODED 1 Month 2 2 months 3 Quarter 4 Other S04C 5	28	CHAR(1)
BLPE_IOD		29	CHAR(1)
BILLMO	In what month was the bill received? S04C 7b	30	CHAR(2)
BILLMO_		32	CHAR(1)
UTILCON	What was the quantity consumed for this bill? S04C 7d	33	NUM(6)
UTILCON_		39	CHAR(1)
UTLUNIT	What was the unit-of-measure, such as kilowatt hours, gallons, cubic feet or therms? 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 S04C 7c	40	CHAR(2)

UTLUNIT_		42	CHAR(1)
BILUSED	Was a bill or other record used or was an estimate given? Checks or checkbooks are not considered records. CODED 1 Records used 2 Estimate S04C 7h	43	CHAR(1)
BILUSED_		44	CHAR(1)
BUDGETED	Are you billed for *(utility or fuel)* on a predetermined budget plan? CODED 1 Yes 2 No S04C 9	45	CHAR(1)
BUDG_TED		46	CHAR(1)
QFUELADZ	Percent of utility/fuel charge not attributable to business expenses and rooms rented to others Census derived	47	NUM(4,2)
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 Census derived	52	NUM(6)
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)

I. ***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 250 Termite or other pest control 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 *(month, three months ago)*, 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 *(month, three months ago)*, excluding the current month, what was the total cost of materials and supplies	32	NUM(6)

purchased not for any specific job?

S05A 7b

MATN_PCX		38	CHAR(1)

M. ***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 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 250 Termite or other pest control 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	21	CHAR(3)
CRMC_DEB		24	CHAR(1)
CRMPROPI	Property number CODED 01-20 Property number (PROP_NOB from Section 3, Part B)	25	CHAR(2)

	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 CODED 1 Addition 2 Alteration 3 Replacement 4 Maintenance and repair 5 New construction	28	CHAR(1)
	S05B 3b		
CRMTYPE_		29	CHAR(1)
APPCDE1	Which of these items did the job include? 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.)	30	CHAR(3)
	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	160	NUM(8)

	Census derived		
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)
QADRSPLX	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)

N. ***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 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	21	CHAR(3)
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	25	CHAR(1)

	3 Purchased as gift to others		
	S06A col. d		
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)
MAJNEWU	Was it new or used when you acquired it? CODED 1 New 2 Used S06A col. g	37	CHAR(1)
MAJNEWU_		38	CHAR(1)
MAJRENTX	What was the total rental expense since the 1st of *(month, 3 months ago)*, 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. j	46	NUM(6)
MAJI_STX		52	CHAR(1)

o. *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 equipment and other yard machinery
- 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
- 410 Phonographs or record players
- 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? CODED 1 Purchased for own use 2 Rented 3 Purchased as gift to others S06B col. d	25	CHAR(1)
GFTCMIN_		26	CHAR(1)
MIN_MO	When did you purchase it? CODED 01-12 January-December S06B col. e	27	CHAR(2)
MIN_MO_		29	CHAR(1)
MINPURX	What did this item cost? (Include delivery charges, exclude installation charges) S06B col. f	30	NUM(6)
MINPURX_		36	CHAR(1)
MINRENTX	What was the total rental expense since the 1st of *(month, 3 months ago)*, excluding the current month? (GFTCMIN = 2 only)? S06B col. g	37	NUM(6)
MINR_NTX		43	CHAR(1)

P. ***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
RPAIRTYP	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 180 Personal care appliances 190 Termite or pest control 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)

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

PART D Furniture Repair or Reupholstering (EQD)

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
SRVCMOD	In what month did you have the item of furniture repaired or reupholstered? S07D col. c	21	CHAR(2)
SRVCMOD_		23	CHAR(1)
FURNREPX	How much did it cost? S07D col. d	24	NUM(6)
FURN_EPX		30	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 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	21	CHAR(3)

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 Installed wall-to-wall carpeting (original carpeting)
211 Non-installed wall-to-wall carpeting (original carpeting)
212 Carpet squares
213 Room-size rugs and other non-permanent floor coverings
214 Curtains and drapes
215 Venetian blinds, window shades, other window coverings
216 Installed wall-to-wall carpeting (replacement carpeting)
217 Non-installed wall-to-wall carpeting (replacement carpeting)
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? S08A col. d	25	CHAR(2)
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 As a gift to someone outside CU S08A col. e	28	CHAR(1)
FURN_FTC		29	CHAR(1)

FURNPURX	What was the purchase price? S08A col. f	30	NUM(6)
FURN_URX		36	CHAR(1)

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

PART B Rental or Leasing 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 excluding any expenses for the current month? S08B 1b	21	NUM(6)
FURN_NTX		27	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 Trousers, slacks, jeans and dungarees 160 Shorts and short sets (excluding athletic shorts) 170 Dresses 180 Skirts and culottes 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	21	CHAR(3)

	270 Combined clothing (100-260) 280 Footwear (include athletic shoes not specifically purchased for sports) S09A col. c		
CLOTHYA_		24	CHAR(1)
CLOTHQA	How many of this item did you purchase? S09A col. e	25	NUM(4)
CLOTHQA_		29	CHAR(1)
CLOTHMOA	In what month did you purchase it? S09A col. f	30	CHAR(2)
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 S09B col. c	21	CHAR(3)
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 S09B col. d	25	CHAR(1)
CLOGFTB_		26	CHAR(1)
CLOTHQB	How many of this item did you purchase? S09B col. e	27	NUM(4)
CLOTHQB_		31	CHAR(1)
CLOTHMOB	In what month did you purchase it? S09B col. f	32	CHAR(2)
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 BLS derived	42	CHAR(1)
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. *<u>SECTION 9 CLOTHING AND SEWING MATERIALS</u>*

<u>PART D Clothing Services (CLD)</u>

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 S10A.1 2b	21	CHAR(3)
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? S10A.1 6b	25	NUM(3,2)
BSNS_CTZ		28	CHAR(1)
QADRENTX	Amount paid for renting vehicle, adjusted for business Census derived	29	NUM(8)
QADR_NTX		37	CHAR(1)
QADADDLX	Amount paid for additional expenses to the rental agency such as for extra insurance or mileage charges, adjusted for business Census derived	38	NUM(8)
QADA_DLX		46	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	21	CHAR(2)
	S10B 1a		
LSDNUM_		23	CHAR(1)
LSDCODE	Vehicle code CODED 100 Automobile 110 Truck or van	24	CHAR(3)
	S10B 1b		
LSDCODE_		27	CHAR(1)
MODELYR	What is the year of the vehicle?	28	CHAR(4)
	S10B 2		
MODELYR_		32	CHAR(1)
MODEL	What is the make and model of the vehicle?	33	CHAR(4)
	Census derived		
MODEL_		37	CHAR(1)
NUMCYL	How many cylinders does it have? (0 if rotary, turbine, or electric)	38	NUM(2)
	S10B 3		
NUMCYL_		40	CHAR(1)
ANYAUTO	Does it have automatic transmission? CODED 1 Yes 2 No	41	CHAR(1)

	S10B 4a		
ANYAUTO_		42	CHAR(1)
ANYSTEER	Does it have power steering? CODED 1 Yes 2 No S10B 4b	43	CHAR(1)
ANYS_EER		44	CHAR(1)
ANYBRAKE	Does it have power brakes? CODED 1 Yes 2 No S10B 4c	45	CHAR(1)
ANYB_AKE		46	CHAR(1)
ANYAC	Does it have air conditioning? CODED 1 Yes 2 No S10B 4d	47	CHAR(1)
ANYAC_		48	CHAR(1)
ANYROOF	Does it have a sun roof? CODED 1 Yes 2 No S10B 4e	49	CHAR(1)
ANYROOF_		50	CHAR(1)
ANYTURBO	Does it have a turbo charged engine? CODED 1 Yes 2 No S10B 4f	51	CHAR(1)
ANYT_RBO		52	CHAR(1)
ANYDIESL	Does it have a diesel engine? CODED 1 Yes 2 No S10B 4g	53	CHAR(1)

ANYD_ESL		54	CHAR(1)
ANYWHEEL	Does it have four wheel drive? CODED 1 Yes 2 No S10B 4h	55	CHAR(1)
ANYW_EEL		56	CHAR(1)
DOORS	How many doors does it have? (LSDCODE = 100 only) S10B 5a	57	NUM(1)
DOORS_		58	CHAR(1)
TYPEVEH	Is it a . . . ? (LSDCODE = 100 only) CODED 1 Station wagon 2 Convertible 3 Hatchback 4 Other S10B 5b	59	CHAR(1)
TYPEVEH_		60	CHAR(1)
PRCBSNSZ	What percent of the mileage is counted as a business expense? S10B 6b	61	NUM(3,2)
PRCB_NSZ		64	CHAR(1)
MILESVEH	How many miles are currently on the vehicle? S10B 7	65	NUM(6)
MILE_VEH		71	CHAR(1)
NEWUSED	Was it new or used when first leased? CODED 1 New 2 Used S10B 8	72	CHAR(1)
NEWUSED_		73	CHAR(1)
LSDSOURC	Was this vehicle leased from a . . . ? (Lessor) CODED 1 New or used vehicle dealer 2 Independent leasing company 3 Bank 4 Someplace else	74	CHAR(1)

	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?	80	CHAR(2)
	S10B 10b		
PMTM_NTH		82	CHAR(1)
PAYEXPX	What is the amount of each payment?	83	NUM(4)
	S10B 10c		
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	88	CHAR(1)
	S10B 10d		
PAYTIME_		89	CHAR(1)
EMPLYEXP	How much of the leasing cost is paid by an employer?	90	NUM(8)
	S10B 11		
EMPL_EXP		98	CHAR(1)
TRADEEXP	How much was the trade-in allowance received?	99	NUM(8)
	S10B 12		
TRAD_EXP		107	CHAR(1)
DOWNEXP	How much was the cash down payment made?	108	NUM(8)
	S10B 13a		
DOWNEXP_		116	CHAR(1)
DNEMPEXP	How much of the cash down payment was paid by an employer?	117	NUM(8)

	S10B 13b		
DNEM_EXP		125	CHAR(1)
LSDENDMO	In what month was the lease terminated?	126	CHAR(2)
	S10B 14b		
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 S11B 1b	21	CHAR(3)
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	25	CHAR(2)

	14 1994 15 1995 16 1996 17 1997 18 1998 19 1999 BLS derived		
VEHICYR_		27	CHAR(1)
MKMDLY	What is the make and model of the vehicle? Census derived	28	CHAR(4)
MKMDLY_		32	CHAR(1)
CYLQ	How many cylinders does it have? (0 if rotary, turbine, or electric) S11B 4	33	NUM(2)
CYLQ_		35	CHAR(1)
AUTOTRAN	Does it have automatic transmission? CODED 1 Yes 2 No S11B 5a	36	CHAR(1)
AUTO_RAN		37	CHAR(1)
PWRSTEER	Does it have power steering? CODED 1 Yes 2 No S11B 5b	38	CHAR(1)
PWRS_EER		39	CHAR(1)
PWRBRAKE	Does it have power brakes? CODED 1 Yes 2 No S11B 5c	40	CHAR(1)
PWRB_AKE		41	CHAR(1)
AIRCAR	Does it have air conditioning? CODED 1 Yes 2 No	42	CHAR(1)

	S11B 5d		
AIRCAR_		43	CHAR(1)
SUNROOF	Does it have a sun roof? CODED 1 Yes 2 No S11B 5e	44	CHAR(1)
SUNROOF_		45	CHAR(1)
TURBOCHG	Does it have a turbo charged engine? CODED 1 Yes 2 No S11B 5f	46	CHAR(1)
TURB_CHG		47	CHAR(1)
DIESEL	Does it have a diesel engine? CODED 1 Yes 2 No S11B 5g	48	CHAR(1)
DIESEL_		49	CHAR(1)
FRWHLDRV	Does it have four wheel drive? CODED 1 Yes 2 No S11B 5h	50	CHAR(1)
FRWH_DRV		51	CHAR(1)
NUMDOOR	How many doors does it have? (VEHICYB = 100 only) S11B 6a	52	NUM(1)
NUMDOOR_		53	CHAR(1)
AUTOTYPE	Is it a . . . ? (VEHICYB = 100 only) CODED 1 Station wagon 2 Convertible 3 Hatchback 4 Other S11B 6b	54	CHAR(1)
AUTO_YPE		55	CHAR(1)

VEHBSNZ	What percent of the mileage is counted as a business expense? S11B 7b	56	NUM(4,2)
VEHBSNZ_		60	CHAR(1)
VEHNEWU	Was it new or used when acquired? CODED 1 New 2 Used S11B 8	61	CHAR(1)
VEHNEWU_		62	CHAR(1)
VPURSRCE	Was this vehicle purchased from . . . ? (Seller) CODED 1 Vehicle dealership 2 Private individual 3 Other S11B 9	63	CHAR(1)
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 S11B 10a	65	CHAR(1)
VEHGFTC_		66	CHAR(1)
VEHPURMO	In what month was it purchased? S11B 11	67	CHAR(2)
VEHP_RMO		69	CHAR(1)
VEHPURYR	In what year was it purchased? S11B 11	70	CHAR(4)
VEHP_RYR		74	CHAR(1)
VFINSTAT	On the 1st of *(month, 3 months ago)*, were all loans on this vehicle paid off or were there any remaining payments to be made? CODED 1 Paid off 2 Remaining payments S11B 12b	75	CHAR(1)

VFIN_TAT		76	CHAR(1)
TRADEX	How much was the trade-in allowance received? S11B 13b	77	NUM(6)
TRADEX_		83	CHAR(1)
NETPURX	What was the amount paid for it after trade-in allowance and discount? S11B 13c	84	NUM(6)
NETPURX_		90	CHAR(1)
EMPLEXPX	How much of the amount or price was paid by an employer? S11B 13f	91	NUM(6)
EMPL_XPX		97	CHAR(1)
DNPAYMTX	What was the amount of the cash down payment? (VFINSTAT = 2 only) S11B 14	98	NUM(6)
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 S11B 15a	105	CHAR(1)
FIN__NST		106	CHAR(1)
PRINCIPX	How much was borrowed, excluding any interest? S11B 15c	107	NUM(6)
PRIN_IPX		113	CHAR(1)
VEHQPMT	What was the number of payments contracted for? S11B 15d	114	NUM(4)
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?	122	CHAR(4)
	S11B 15e		
PMT1YR_		126	CHAR(1)
PAYMENTX	What is the amount of each payment?	127	NUM(4)
	S11B 15f		
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	132	CHAR(1)
	S11B 15g		
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?	134	NUM(6)
	S11B 15i		
EXTR_HGX		140	CHAR(1)
QINTRSTZ	Interest rate, based on the direct ratio formula	141	NUM(5,4)
	QINTRSTZ=(72*((VEHQPMT*PAYMENTX)-PRINCIPX))/(((3*PRINCIPX)*(VEHQPMT + 1)) + (((VEHQPMT*PAYMENTX)-PRINCIPX)*(VEHQPMT-1)))		
	BLS derived		
QINT_STZ		146	CHAR(1)
	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:
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 BLS derived	147	NUM(4)
QLOA_M1Q		151	CHAR(1)
QBALNM1X	Principal balance outstanding at the beginning of first month of reference period BLS derived	152	NUM(8)
QBAL_M1X		160	CHAR(1)
QVINTM1X	Amount of interest paid during first month of reference period BLS derived	161	NUM(8)
QVIN_M1X		169	CHAR(1)
QVPRIM1X	Amount of principal paid during first month of reference period BLS derived	170	NUM(8)
QVPR_M1X		178	CHAR(1)
QLOANM2Q	Number of months since the inception of loan as of second month of reference period BLS derived	179	NUM(4)
QLOA_M2Q		183	CHAR(1)
QBALNM2X	Principal balance outstanding at the beginning of second month	184	NUM(8)

	of reference period		
	BLS derived		
QBAL_M2X		192	CHAR(1)
QVINTM2X	Amount of interest paid during second month of reference period	193	NUM(8)
	BLS derived		
QVIN_M2X		201	CHAR(1)
QVPRIM2X	Amount of principal paid during second month of reference period	202	NUM(8)
	BLS derived		
QVPR_M2X		210	CHAR(1)
QLOANM3Q	Number of months since the inception of loan as of third month of reference period	211	NUM(4)
	BLS derived		
QLOA_M3Q		215	CHAR(1)
QBALNM3X	Principal balance outstanding at the beginning of second month of reference period	216	NUM(8)
	BLS derived		
QBAL_M3X		224	CHAR(1)
QVINTM3X	Amount of interest paid during third month of reference period	225	NUM(8)
	BLS derived		
QVIN_M3X		233	CHAR(1)
QVPRIM3X	Amount of principal paid during third month of reference period	234	NUM(8)
	BLS derived		
QVPR_M3X		242	CHAR(1)
QTRADEX	Amount paid for vehicle after trade-in allowance minus amount of cost paid by employer	243	NUM(8)
	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		
QTRADEX_		251	CHAR(1)
QREIMBRZ	Percent of cost paid by employer after trade-in allowance (EMPLEXPX/NETPURX) Census derived	252	NUM(4,2)
QREI_BRZ		256	CHAR(1)
QADITR1X	Amount of interest paid during first month of reference period, adjusted for business (QVINTM1X * (1-QREIMBRZ)) BLS derived	257	NUM(8)
QADI_R1X		265	CHAR(1)
QADITR2X	Amount of interest paid during second month of reference period, adjusted for business (QVINTM2X * (1-QREIMBRZ)) BLS derived	266	NUM(8)
QADI_R2X		274	CHAR(1)
QADITR3X	Amount of interest paid during third month of reference period, adjusted for business (QVINTM3X * (1-QREIMBRZ)) BLS derived	275	NUM(8)
QADI_R3X		283	CHAR(1)
QDNPYMTX	Amount of down payment, adjusted for business (DNPAYMTX * (1-QREIMBRZ)) Census derived	284	NUM(6)
QDNP_MTX		290	CHAR(1)
VEHMILE	How many miles are currently on the vehicle? (VEHICYB = 100-120, 150 only) S11B 10b	291	NUM(6)
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 S11B 15b	298	CHAR(1)
VEHE_TLN		299	CHAR(1)

VEHICIB	Vehicle number S11B 1a	300	CHAR(2)
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 S11C 1b	21	CHAR(3)
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 S11C 2a	25	CHAR(1)
VEHDISP_		26	CHAR(1)
VDISPMO	In what month was it disposed of? S11C 2b	27	CHAR(2)
VDISPMO_		29	CHAR(1)
SALEX	How much did you sell it for? (VEHDISP = 1 only)	30	NUM(6)

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

bb. *SECTION 12 VEHICLE OPERATING EXPENSES (VEQ)*

PART A Vehicle Maintenance and Repair, Parts, and Equipment

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 S12A col. e	21	CHAR(3)
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	42	NUM(8)

	Census derived		
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? CODED 1 Yes 2 No S12A col. i	57	CHAR(1)
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 420 Vehicle registration 430 Combined expenses (400 - 420) 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 motor coolant-antifreeze, brake fluid, transmission fluid, gasoline additives, oil additives, and radiator/cooling system protectors, 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 *(month, 3 months ago)*, 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 *(month, 3 months ago)*, 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 *(month, 3 months ago)*, 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 *(month, 3 months ago)*, excluding *(this month)*, 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 *(month, 3 months ago)*, excluding *(this month)*, how much were expenses for bottled or tank gas for recreational vehicles, including vans, campers, and boats? S12C 6b	51	NUM(6)
TANK_ASX		57	CHAR(1)
QBSNSEPZ	Percent of expenses for gasoline and other fuels counted as business expense Census derived	58	NUM(4,2)
QBSN_EPZ		62	CHAR(1)
QOIL3MCX	Amount paid for oil, other than oil included with purchase of oil change, during the reference period Census derived	63	NUM(8)

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 BLS derived	72	NUM(8)
JGAS_XQV		80	CHAR(1)
JDIESXQV	Quarterly expenditure on diesel fuel to operate automobiles, trucks, motorcycles, or any other vehicles, adjusted for business BLS derived	81	NUM(8)
JDIE_XQV		89	CHAR(1)

ee. ***<u>SECTION 13 INSURANCE OTHER THAN HEALTH</u>***

<u>PART B Detailed Questions (INB)</u>

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 400 Tenant's insurance 500 Fire and extended coverage insurance 600 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 S13B 6a	48	CHAR(1)
PREM_AID		49	CHAR(1)
PAYDEDPR	Are any premiums paid through payroll deductions? (PREMPAID = 1 or 2 only) CODED 1 Yes 2 No S13B 6b	50	CHAR(1)
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	52	CHAR(1)

4 Monthly - in mortgage payment
5 Quarterly
6 Semiannually
7 Annually
8 Paid-up policy
9 Other

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.) QPROPDDZ = SUM(1-OBSNSZB)/n Census derived	59	NUM(4,2)
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.) QRTINDDZ = SUM(1-RTBSNSZ)/n Census derived	64	NUM(4,2)
QRTI_DDZ		68	CHAR(1)
QVH3MCMX	Amount paid in premiums for automobile or other vehicle insurance, adjusted for business, during reference period Census derived	69	NUM(8)
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 Census derived	78	NUM(8)
QPR3_CMX		86	CHAR(1)

QTN3MCMX	Amount paid in premiums for tenant's insurance, adjusted for business, during reference period Census derived	87	NUM(8)
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 Census derived	96	NUM(8)
QLIFCMX_		104	CHAR(1)
QOTHCMX	Amount paid in premiums for other types of non-health insurance during reference period Census derived	105	NUM(8)
QOTHCMX_		113	CHAR(1)
INSPTYPE	Property code for insurance 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 owned property BLS derived	114	CHAR(1)
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 S14B 1a	21	CHAR(2)
HHIP_LIB		23	CHAR(1)
HHISTATB	Policy discontinued CODED 1 Discontinued	24	CHAR(1)

	S14B 1b		
HHIS_ATB		25	CHAR(1)
HHICOVQ	How many CU members are covered by this policy? 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	26	NUM(2)
HHICOVQ_		28	CHAR(1)
HHIGROUP	Was the policy obtained on an individual or group basis? CODED 1 Individually obtained 2 Group through place of employment 3 Group through other organization S14B 5	29	CHAR(1)
HHIG_OUP		30	CHAR(1)
HHIPRMPD	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	31	CHAR(1)
HHIP_MPD		32	CHAR(1)
HHIPRDED	Are any of the premiums paid through payroll deductions? (HHIPRMPD = 1 or 2 only) CODED 1 Yes 2 No S14B Q7	33	CHAR(1)
HHIP_DED		34	CHAR(1)
HHIRPMPD	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	35	CHAR(1)

	S14B Q8b		
HHIR_MPD		36	CHAR(1)
QHI3MCX	Amount paid for health insurance premiums during the reference period Census derived	37	NUM(8)
QHI3MCX_		45	CHAR(1)
HHIBCBS	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	46	CHAR(1)
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	54	CHAR(1)

3 Prescription drug insurance
4 Mental health insurance
5 Dread disease policy
6 Other type of special purpose health insurance

S14B 4d

HHIS_ECT		55	CHAR(1)

gg. ***<u>SECTION 14 HOSPITALIZATION AND HEALTH INSURANCE</u>***

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

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 *(month, 3 months ago)*? 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)
WHOMCR01	Who is (was) enrolled in Medicare? (MEMBNO from MEMB file) (HHMCRENR = 1 only) S14C 1c	26	NUM(2)
WHOM_R01		28	CHAR(1)
WHOMCR02	See WHOMCR01 for question and source.	29	NUM(2)
WHOM_R02		31	CHAR(1)
WHOMCR03	See WHOMCR01 for question and source.	32	NUM(2)
WHOM_R03		34	CHAR(1)
WHOMCR04	See WHOMCR01 for question and source.	35	NUM(2)

WHOM_R04		37	CHAR(1)
WHOMCR05	See WHOMCR01 for question and source.	38	NUM(2)
WHOM_R05		40	CHAR(1)
WHOMCR06	See WHOMCR01 for question and source.	41	NUM(2)
WHOM_R06		43	CHAR(1)
WHOMCR07	See WHOMCR01 for question and source.	44	NUM(2)
WHOM_R07		46	CHAR(1)
WHOMCR08	See WHOMCR01 for question and source.	47	NUM(2)
WHOM_R08		49	CHAR(1)
WHOMCR09	See WHOMCR01 for question and source.	50	NUM(2)
WHOM_R09		52	CHAR(1)
WHOMCR10	See WHOMCR01 for question and source.	53	NUM(2)
WHOM_R10		55	CHAR(1)
WHOMCR11	See WHOMCR01 for question and source.	56	NUM(2)
WHOM_R11		58	CHAR(1)
WHOMCR12	See WHOMCR01 for question and source.	59	NUM(2)
WHOM_R12		61	CHAR(1)
WHOMCR13	See WHOMCR01 for question and source.	62	NUM(2)
WHOM_R13		64	CHAR(1)
WHOMCR14	See WHOMCR01 for question and source.	65	NUM(2)
WHOM_R14		67	CHAR(1)
WHOMCR15	See WHOMCR01 for question and source.	68	NUM(2)
WHOM_R15		70	CHAR(1)
MDCDENR	Is anyone in your CU enrolled in Medicaid or has anyone in your CU been enrolled since the 1st of *(month, 3 months ago)*?? 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)	73	NUM(2)
	S14C 2b		
MDCDCOV_		75	CHAR(1)
WHOMCD01	Who is (was) enrolled in Medicaid? (MEMBNO from MEMB file) (MDCDENR = 1 ONLY)	76	NUM(2)
	S14C 2c		
WHOM_D01		78	CHAR(1)
WHOMCD02	See WHOMCD01 for question and source.	79	NUM(2)
WHOM_D02		81	CHAR(1)
WHOMCD03	See WHOMCD01 for question and source.	82	NUM(2)
WHOM_D03		84	CHAR(1)
WHOMCD04	See WHOMCD01 for question and source.	85	NUM(2)
WHOM_D04		87	CHAR(1)
WHOMCD05	See WHOMCD01 for question and source.	88	NUM(2)
WHOM_D05		90	CHAR(1)
WHOMCD06	See WHOMCD01 for question and source.	91	NUM(2)
WHOM_D06		93	CHAR(1)
WHOMCD07	See WHOMCD01 for question and source.	94	NUM(2)
WHOM_D07		96	CHAR(1)
WHOMCD08	See WHOMCD01 for question and source.	97	NUM(2)
WHOM_D08		99	CHAR(1)
WHOMCD09	See WHOMCD01 for question and source.	100	NUM(2)
WHOM_D09		102	CHAR(1)
WHOMCD10	See WHOMCD01 for question and source.	103	NUM(2)
WHOM_D10		105	CHAR(1)
WHOMCD11	See WHOMCD01 for question and source.	106	NUM(2)
WHOM_D11		108	CHAR(1)
WHOMCD12	See WHOMCD01 for question and source.	109	NUM(2)

WHOM_D12		111	CHAR(1)
WHOMCD13	See WHOMCD01 for question and source.	112	NUM(2)
WHOM_D13		114	CHAR(1)
WHOMCD14	See WHOMCD01 for question and source.	115	NUM(2)
WHOM_D14		117	CHAR(1)
WHOMCD15	See WHOMCD01 for question and source.	118	NUM(2)
WHOM_D15		120	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 or military health 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)	21	CHAR(3)

	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 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 S15B col. b	25	CHAR(1)
MEDP_FTC		26	CHAR(1)
MEDPMTMO	In what month was (were) the payment(s) made? S15B col. c	27	CHAR(2)
MEDP_TMO		29	CHAR(1)
MEDPMTX	What was the amount of the payment? S15B col. d	30	NUM(8)
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 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	21	CHAR(3)
MEDR_ARY		24	CHAR(1)
MEDRGFTC	Was the person who received the care a CU member? CODED 1 Yes 2 No S15D col. b	25	CHAR(1)
MEDR_FTC		26	CHAR(1)
MEDRMBMO	In what month was (were) the reimbursement(s) received? S15D col. c	27	CHAR(2)
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 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 Rental of any school books or equipment which has not already been reported 350 Purchase of any school books, supplies, or equipment which has not already been reported 360 Other school related expenses not already reported 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	21	CHAR(3)
EDUC_AY_		24	CHAR(1)
EDUCGFTC	Who was the educational expense for? CODED 01-98 CU member (MEMBNO from MEMB file) 99 Someone outside CU S16 col. d	25	CHAR(2)
EDUC_FTC		27	CHAR(1)
EDSCHL_A	What kind of school was it? CODED 1 College or university 2 Elementary or high school 3 Child day care center 4 Nursery school or preschool 5 Other school	28	CHAR(1)

	S16 col. e		
EDSC_L_A		29	CHAR(1)
EDMONTHA	In what month was the payment made?	30	CHAR(2)
	S16 col. f		
EDMO_THA		32	CHAR(1)
EDREIMBX	How much of the payment was or will be reimbursed?	33	NUM(8)
	S16 col. i		
EDRE_MBX		41	CHAR(1)
JEDUCNET	Net amount paid for educational expenses during reference period	42	NUM(8)
	BLS derived		
JEDU_NET		50	CHAR(1)

kk. ***<u>SECTION 17 SUBSCRIPTIONS, MEMBERSHIPS, BOOKS, AND ENTERTAINMENT EXPENSES</u>***

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 memberships 830 Automobile service clubs 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 1 Own use 2 Gift S17A col. d	25	CHAR(1)
S17G_TCA		26	CHAR(1)
QSUB3MCX	Amount paid for subscriptions and memberships during reference period Census derived	27	NUM(8)
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 Census derived	21	NUM(8)
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 Census derived	30	NUM(8)
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 Census derived	39	NUM(8)
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) Census derived	48	NUM(8)
QBK3_CMX		56	CHAR(1)
QMG3MCMX	Amount paid for magazines not included in a subscription during the reference period Census derived	57	NUM(8)
QMG3_CMX		65	CHAR(1)
QNEW3MCX	Amount paid for single copies of newspapers (non-subscription) during the reference period Census derived	66	NUM(8)
QNEW_MCX		74	CHAR(1)
QREC3MCX	Amount paid for compact discs, audio tapes, needles, or records	75	NUM(8)

	other than through a mail-order club during the reference period		
	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?	34	NUM(3)

	S18B/C 1g		
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	124	NUM(8)

	BLS derived		
CMBUSX_		132	CHAR(1)
CMSHIPX	Amount spent for ships	133	NUM(8)
	BLS derived		
CMSHIPX_		141	CHAR(1)
RTCARX	Amount spent for rented cars or jeeps not including gas you (or any members of your CU) bought	142	NUM(8)
	BLS derived		
RTCARX_		150	CHAR(1)
RTTRUCKX	Amount spent for rented trucks or vans not including gas you (or any members of your CU) bought	151	NUM(8)
	BLS derived		
RTTR_CKX		159	CHAR(1)
RTMOPEDX	Amount spent for rented motorcycles or mopeds not including gas you (or any members of your CU) bought	160	NUM(8)
	BLS derived		
RTMO_EDX		168	CHAR(1)
RTPLANEX	Amount spent for rented private planes not including gas you (or any members of your CU) bought	169	NUM(8)
	BLS derived		
RTPL_NEX		177	CHAR(1)
RTBOATX	Amount spent for rented boats or trailers not including gas you (or any members of your CU) bought	178	NUM(8)
	BLS derived		
RTBOATX_		186	CHAR(1)
RTCAMPX	Amount spent for rented campers not including gas you (or any members of your CU) bought)	187	NUM(8)
	BLS derived		
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)
TRPSPRTX	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	262	NUM(6)
	BLS derived		
TRSP_RTX		268	CHAR(1)
TRPETRTX	Amount spent for entertainment or admissions	269	NUM(6)

	BLS derived		
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 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	33	CHAR(3)

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 *(month, three months ago)*, how many trips have you (has your CU) paid in full or in part for any non-CU members? S18E 1b	21	NUM(2)
NUMN_NCU		23	CHAR(1)
TRNONCUX	What was the total amount that you (your CU) paid for that trip (those trips)? BLS derived	24	NUM(8)
TRNO_CUX		32	CHAR(1)
TRNONCUY	Type of expense paid for non-CU members CODED 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	33	CHAR(3)
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? S18F 2	21	NUM(2)
NUMLOC_		23	CHAR(1)
LOCLODGX	Cost for hotels, motels, cottages, trailer camps, or other lodging, including taxes and tips BLS derived	24	NUM(8)
LOCL_DGX		32	CHAR(1)
ALCMEALX	Cost for alcoholic beverages at restaurants, bars, or fast food places, including taxes and tips BLS derived	33	NUM(8)
ALCM_ALX		41	CHAR(1)
ALCGROCX	What was the cost for alcoholic beverages at grocery stores, convenience stores, or liquor stores, including taxes? S18F 6d	42	NUM(8)
ALCG_OCX		50	CHAR(1)
LOCADMSX	Amount paid for entertainment or admissions BLS derived	51	NUM(8)
LOCA_MSX		59	CHAR(1)
FOODLCDL	Did the package deal include anything for food and beverages? CODED 1 Yes 2 No S18F 3b	60	CHAR(1)
FOOD_CDL		61	CHAR(1)
LODGLCDL	Did the package deal include anything for lodging? CODED 1 Yes	62	CHAR(1)

	2 No S18F 3b		
LODG_CDL		63	CHAR(1)
ENTRLCDL	Did the package deal include anything for entertainment? CODED 1 Yes 2 No S18F 3b	64	CHAR(1)
ENTR_CDL		65	CHAR(1)
ELSELCDL	Did the package deal include anything for anything else? CODED 1 Yes 2 No S18F 3b	66	CHAR(1)
ELSE_CDL		67	CHAR(1)
QLCMLAX	Cost of meals, snacks, or drinks at restaurants, bars, or fast food places, excluding alcoholic beverages Census derived	68	NUM(8)
QLCMLAX_		76	CHAR(1)
QLCGLAX	Cost of food or beverages at grocery stores, convenience stores, or liquor stores, excluding alcoholic beverages Census derived	77	NUM(8)
QLCGLAX_		85	CHAR(1)

qq. *SECTION 19 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 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 270 Money given to non-CU members, charities, and other organizations 280 Computer information services 290 TV computer games and computer game software 300 Hand held computer games and computer board games 310 Alimony 320 Child support 330 Toys and games 340 Hobbies 350 Adult day care centers S19 col. c	21	CHAR(3)
MISC_ODE		24	CHAR(1)
MISCMO	In what month did you have this expense? CODED 01-12 January-December 13 Continuous expense S19 col. d	25	CHAR(2)
MISCMO_		27	CHAR(1)
MISCGFTC	Was this expense for your CU or someone outside of your CU? CODED 1 For CU	28	CHAR(1)

	2 For someone outside your CU		
	S19 col. e		
MISC_FTC		29	CHAR(1)
MISCEXPX	What was the total amount of the expense?	30	NUM(6)
	S19 col. f		
MISC_XPX		36	CHAR(1)

rr. *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

S20A 8

VARIABLE	ITEM DESCRIPTION	START POSITION	FORMAT
FREE_OOD		130	CHAR(1)

ss. ***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
PAYPHONX	Since the 1st of *(month, 3 months ago)*, what was the total expense for public pay phone service? S20B 1b	21	NUM(5)
PAYP_ONX		26	CHAR(1)
OTHLNDRX	What was the cost for coin-operated laundry or dry cleaning machines for items other than clothes? S20B 2d	27	NUM(5)
OTHL_DRX		32	CHAR(1)
OTHDCLNX	What was the cost for items other than clothes sent to the dry cleaners or laundry? S20B 3d	33	NUM(4)
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 *(month, 3 months ago)*? S20B 7b	38	NUM(3)
SAFD_STX		41	CHAR(1)
TXLIMX	Since the 1st of *(month, 3 months ago)*, what was the total expense for taxis or limousine service for nonbusiness purposes, except those used while on a trip? S20B 9b	42	NUM(4)
TXLIMX_		46	CHAR(1)

TRANWRKQ	How many members of the CU use mass transit to go to work?	47	NUM(2)
	S20B 10c(1)		
TRAN_RKQ		48	CHAR(1)
TRANSCHQ	How many members of the CU use mass transit to go to school?	50	NUM(2)
	S20B 10c(2)		
TRAN_CHQ		52	CHAR(1)
TRANOTHQ	How many members of the CU use mass transit to go to other places?	53	NUM(2)
	S20B 10c(3)		
TRAN_THQ		55	CHAR(1)
PRIVBUSX	What was the total expense for private school buses?	56	NUM(4)
	S20B 11b		
PRIV_USX		60	CHAR(1)
JLDRYNET	Cost for coin-operated laundry or dry cleaning machines for clothing items	61	NUM(8)
	BLS derived		
JLDR_NET		69	CHAR(1)
JDRYCNET	Cost for services at the dry cleaners or laundry for clothing items	70	NUM(8)
	BLS derived		
JDRY_NET		78	CHAR(1)
JCIGARQV	Quarterly expenditure for cigarettes	79	NUM(8)
	BLS derived		
JCIG_RQV		87	CHAR(1)
JOTBACQV	Quarterly expenditure for cigars, pipe tobacco, or other tobaccos, including chewing tobacco	88	NUM(8)
	BLS derived		
JOTB_CQV		96	CHAR(1)
JMHAIRQV	Quarterly expenditure for haircutting, styling and other related services for all male members of your CU	97	NUM(8)
	BLS derived		

JMHA_RQV		105	CHAR(1)
JFHAIRQV	Quarterly expenditure for haircutting, styling and all other related services for all female members of your CU	106	NUM(8)
	BLS derived		
JFHA_RQV		114	CHAR(1)
JBNKSCQV	Quarterly charges for checking accounts or other banking services	115	NUM(8)
	BLS derived		
JBNK_CQV		123	CHAR(1)
JTRANWQV	Usual quarterly cost of mass transit to go to work	124	NUM(8)
	BLS derived		
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)

tt. *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 S21A.1 col. b	21	CHAR(3)
CRED_TR1		24	CHAR(1)
CREDITX1	On the 1st of *(the current month)*, how much was owed to *(credit source)*? (Do not include mortgage, home equity loans, vehicle loans, or business related loans) S21A.1 col. d	25	NUM(8)
CRED_TX1		33	CHAR(1)

uu. *SECTION 21 CREDIT LIABILITY*

PART A 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	21	CHAR(3)

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

S21A.2S col. b

CRED_TR5		24	CHAR(1)
CREDITX5	On the 1st of *(the current month)*, how much was owed to *(credit source)*? (Do not include mortgage, home equity loans, vehicle loans, or business related loans)? S21A.2S col. d	25	NUM(8)
CRED_TX5		33	CHAR(1)
OWEMONEY	What was the total amount owed on the 1st of *(current month, one year ago)*? S21A.2S col. e	34	NUM(8)
OWEM_NEY		42	CHAR(1)

vv. *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) S21B.S a	21	NUM(6)
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? S21B.S b	28	NUM(6)

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? S21B.S c	35	NUM(6)
BANKX_		41	CHAR(1)
CDUNIONX	During the past 12 months, how much was paid for finance, interest and late charges to credit unions? S21B.S d	42	NUM(6)
CDUN_ONX		48	CHAR(1)
FININT	During the past 12 months, how much was paid for finance, interest and late charges to finance companies? S21B.S e	49	NUM(6)
FININT_		55	CHAR(1)
INSUREX	During the past 12 months, how much was paid for finance, interest and late charges to insurance companies? S21B.S f	56	NUM(6)
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? S21B.S g	63	NUM(6)
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? S21B.S h	70	NUM(6)
PDOT_ERX		76	CHAR(1)

6. ***PROCESSING FILES***

a. ***AGGregation file***

X:\INTRVW98\AGGI98.TXT

The AGG file shows which UCC/Gift code combinations go into each category listed in the sample table produced by the microdata file verification and estimation program (see Section VII.A. SAMPLE PROGRAM). It designates each category with a unique 6-digit line number. It is formatted as follows:

DESCRIPTION	START POSITION	FORMAT
UCC (Universal Classification Code)	3	CHAR(6)
Gift CODED 1 Yes 2 No	10	CHAR(1)
Line Number: represents a line in the sample table	15	CHAR(6)

b. ***LABel file***

X:\INTRVW98\LABELI98.TXT

The LAB file assigns an identification label to each AGG file line number. It is formatted as follows:

DESCRIPTION	START POSITION	FORMAT
Line Number: represents a line in the sample table	1	CHAR(6)
Label: descriptive label in the sample table (with leading blanks)	8	CHAR(73)

c. ***UCC file***

X:\INTRVW98\UCCI98.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).)

d. ***VEHicle file***

X:\INTRVW98\VEHI98.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)

e. ***SAMPLe program file***

X:\PROGRAMS\SAMPLI98.TXT (SAS)

The SAMPLI98 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
OCCEXPNX	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.

Variable	Critical value +	Critical value -	Topcode value +	Topcode value -
AGE_REF	90	-	93	-
AGE2	90	-	94	-
ALIOTHX	29,000	-	40,480	-
BSINVSTX	100,000	-	200,800	-

Variable	Critical value +	Critical value -	Topcode value +	Topcode value -
CHDLMPX	7,200	-	9,075	-
CHDOTHX	15,200	-	20,854	-
CKBKACTX	20,000	-	170,329	-
COMPBNDX	13,000	-8,000	78,333	-14,000
COMPCKGX	20,000	-15,000	123,417	-79,545
COMPOWDX	30,000	-11,000	314,333	-28,500
COMPSAVX	43,000	-30,000	131,237	-68,006
COMPSECX	156,000	-150,000	570,000	-407,311
FEDRFNDX	5,000	-	9,580	-
FEDTAXX	20,000	-	52,569	-
FININCX	36,000	-	87,841	-
INCLOSSA	27,000	-6,861	33,600	-7,539
INCLOSSB	29,500	-12,000	63,629	-18,125
INSRFNDX	8,000	-	30,556	-
INTEARNX	35,000	-	60,444	-
LUMPSUMX	99,000	-	180,862	-
MISCTAXX	4,820	-	12,762	-
MONYOWDX	60,000	-	120,785	-
OCCEXPNX	2,490	-	4,551	-
OTHRFNDX	6,000	-	14,031	-
OTHRINCX	25,000	-	182,982	-
PENSIONX	46,800	-	73,529	-
PTAXRFDX	2,100	-	3,397	-
PURSSECX	100,000	-	723,167	-
RENTEQVX	2,000	-	3,215	-
SALEINCX	5,000	-	21,253	-
SAVACCTX	95,000	-	183,364	-
SECESTX	695,000	-	1,415,339	-
SELLSECX	100,000	-	904,556	-
SETLINSX	15,000	-	17,742	-
SLOCTAXX	5,000	-	12,762	-
SLRFUNDX	1,312	-	2,632	-
SSOVERPX	500	-	1,546	-
TAXPROPX	4,500	-	7,803	-
USBNDX	38,902	-	82,153	-
WDBSASTX	45,000	-	85,000	-
WDBSGDSX	13,000	-	55,000	-

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 FNONFARMX (family income from nonfarm business) is computed as the sum of the values reported for the variable NONFARMX (member income from nonfarm business) from the MEMB file. NONFARMX is subject to topcoding beyond the critical value of $150,000 (-$9,999). The topcode value for NONFARMX is $258,857 (-$27,547). (See Section IV.B. MEMBER CHARACTERISTICS AND INCOME FILE (MEMB)).

		NONFARMX		**FNONFARMX**	
CU		*REPORTED*	*AFTER TOPCODING*	*VALUE*	*FLAGGED AS TOPCODED?*
CU 1:	MEMB1	$145,000	$145,000		
	MEMB2	145,000	145,000	290,000	No
CU 2:	MEMB1	270,000	258,857		
	MEMB2	20,000	20,000	278,857	Yes
CU 3	MEMB1	170,000	258,857		
	MEMB2	50,000	50,000	308,857	Yes
CU 4	MEMB1	100,000	100,000		
	MEMB2	-11,000	-27,547	72,453	Yes

While CUs 1 and 2 each originally report $290,000 in NONFARMX, topcoding is done only on the value reported by MEMB1 of CU2. Thus, the value for FNONFARMX 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 slightly below the reported value, CU3's topcoded FNONFARMX value ($308,857) is higher than the amount that it reported ($220,000). The case of CU4 demonstrates that the value for FNONFARMX can be much lower than other topcoding situations, yet still be flagged as topcoded. This is due to the presence of a negative value (loss) for NONFARMX 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
[RR]04	Arizona	31	Nebraska
*05	Arkansas	[R]32	Nevada
**06	California	[R]33	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	[RR]39	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	[R]54	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 strata[1] 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 stratum[1] 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 strata[1].

[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 stratum[1].

[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.

Variable	Critical value +	Critical value -	Topcode value +	Topcode value -
AGE	90	-	93	-
AMTFED	862	-	2,512	-
ANFEDTX	16,824	-	30,876	-
ANGOVRTX	5,882	-	7,408	-
ANPRVPNX	10,937	-	16,084	-
ANRRDEDX	4,130	-	5,800	-
ANSLTX	5,875	-	10,010	-
FARMINCX	110,000	-9,999	213,750	-29,820
GOVRETX	439	-	1,737	-
GROSPAYX	5,000	-	16,855	-
INDRETX	13,500	-	31,437	-
JSSDEDX	5,981	-	8,018	-
NONFARMX	150,000	-9,999	258,857	-27,547
PRIVPENX	600	-	1,994	-
RRRDEDX	205	-	459	-
SALARYX	150,000	-	238,834	-
SLFEMPSS	11,382	-	13,220	-
SLTAXX	287	-	716	-

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) ANFEDTX = (SALARYX (AMTFED/GROSPAYX)).

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

(2) SALARYX = (ANFEDTX (GROSPAYX/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.

UCC	Description
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
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
790820	Mortgage held after sale, other property
790910	Special or lump mortgage payment, other property
790920	Reduction of mortgage principal, other property

UCC	Description
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
820201	Principal amount trust held, owned home
820202	Principal amount trust held, 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
910060	Estimated monthly rental value, time share
910070	Estimated monthly rental value, owned vacation home
910080	Rent received for time share
910090	Rent received for owned 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.

UCC	Critical value +	Critical value -	Topcode value +	Topcode value -	Mapped from	Condition
210110	1,160	-	1,632	-	QRT3MCMX	
210110	135	-	273	-	QPK3MCMX	
210210	1,150	-	2,204	-	LDGCOSTX	
210210	466	-	1,350	-	TOTYUPDX	TOTYUPDY = '130'
210210	688	-	2,096	-	TRNONCUX	TRNONCUY = '130'
210310	2,849	-	4,919	-	JEDUCNET	EDUC_AY = '310'
210901	437	-	791	-	QLR3MCMX	OWNYI = '100' OR OWNYI = '200'
210902	340	-	689	-	QLR3MCMX	OWNYI = '300'
550320	339	-	733	-	MEDPMTX	MEDPCARY = '660'
550330	425	-	716	-	MEDPMTX	MEDPCARY = '640'
560110	350	-	821	-	MEDPMTX	MEDPCARY = '420'
560110	-	-1,050	-	-1,836	MEDRMBX	MEDRCARY = '420'
560210	950	-	1,646	-	MEDPMTX	MEDPCARY = '200'
560210	-	-595	-	-1,015	MEDRMBX	MEDRCARY = '200'
560310	250	-	1,013	-	MEDPMTX	MEDPCARY = '110'
560310	-	-267	-	-1,532	MEDRMBX	MEDRCARY = '110'
560330	400	-	1,049	-	MEDPMTX	MEDPCARY = '510'

UCC	Critical value +	Critical value -	Topcode value +	Topcode value -	Mapped from	Condition
560330	-	-200	-	-313	MEDRMBX	MEDRCARY = '510'
560400	400	-	1,012	-	MEDPMTX	MEDPCARY = '410'
560400	-	-795	-	-1,225	MEDRMBX	MEDRCARY = '410'
570110	1,900	-	4,056	-	MEDPMTX	MEDPCARY = '310'
570210	1,500	-	3,099	-	MEDPMTX	MEDPCARY = '320'
570210	-	-6,300	-	-21,166	MEDRMBX	MEDRCARY = '320'
570220	5,000	-	5,418	-	MEDPMTX	MEDPCARY = '520'
570230	581	-	2,450	-	MEDPMTX	MEDPCARY = '530'
570901	356	-	425	-	MEDPMTX	MEDPCARY = '650'
570903	285	-	831	-	MEDPMTX	MEDPCARY = '630'
790710	215,000	-	542,267	-	OWN_PURX	OWNYB = '400' OR OWNYB = '500'
790820	25,000	-	30,000	-	TRUSTX	OWNYD = '400' OR OWNYD = '500'
790910	-	-750	-	-18,250	QLMPSUMX	OWNYI = '400' OR OWNYI = '500'
790920	-	-706	-	-907	QPRINM1X	(OWNYF = '400' OR OWNYF = '500') AND (LOANTYPE = '1')
790920	-	-713	-	-915	QPRINM2X	(OWNYF = '400' OR OWNYF = '500') AND (LOANTYPE = '1')
790920	-	-720	-	-922	QPRINM3X	(OWNYF = '400' OR OWNYF = '500') AND (LOANTYPE = '1')
790930	175,000	-	290,966		ORGMRTX	(OWNYF = '400' OR OWNYF = '500') AND (LOANTYPE = '1')
800721	41,667	-	79,971	-	PROPVALX	OWNYB = '100' OR OWNYB = '200'
810101	360,000	-	617,750	-	OWN_PURX	OWNYB = '100' OR OWNYB = '200'
810102	189,000	-	330,000	-	OWN_PURX	OWNYB = '300'
820101	-	-318,000	-	-500,000	DISPX	OWNYD = '100' OR OWNYD = '200'
820201	25,000	-	56,000		TRUSTX	OWNYD = '100' OR OWNYD = '200'
830101	-	-2,000	-	-4,210	QLMPSUMX	OWNYI = '100' OR OWNYI = '200'
830102	-	-744	-	-1,675	QLMPSUMX	OWNYI = '300'
830201	-	-669	-	-1,022	QPRINM1X	(OWNYF = '100' OR OWNYF = '200') AND (LOANTYPE = '1')
830201	-	-667	-	-1,010	QPRINM2X	(OWNYF = '100' OR OWNYF = '200') AND (LOANTYPE = '1')
830201	-	-671	-	-1,363	QPRINM3X	(OWNYF = '100' OR OWNYF = '200') AND (LOANTYPE = '1')
830202	-	-541	-	-1,336	QPRINM1X	(OWNYF = '300') AND (LOANTYPE = '1')
830202	-	-545	-	-1,346	QPRINM2X	(OWNYF = '300') AND (LOANTYPE = '1')
830202	-	-559	-	-1,489	QPRINM3X	(OWNYF = '300') AND (LOANTYPE = '1')
830203	-	-533	-	-669	QPRINM1X	(OWNYF = '100' OR OWNYF = '200') AND (LOANTYPE = '2')
830203	-	-524	-	-664	QPRINM2X	(OWNYF = '100' OR OWNYF = '200') AND (LOANTYPE = '2')
830203	-	-532	-	-679	QPRINM3X	(OWNYF = '100' OR OWNYF = '200') AND (LOANTYPE = '2')
830301	234,000	-	415,366	-	ORGMRTX	(OWNYF = '100' OR OWNYF = '200') AND (LOANTYPE = '1')
830303	79,800	-	108,585	-	ORGMRTX	(OWNYF = '100' OR OWNYF = '200') AND (LOANTYPE = '2')
880120	-	-2,338	-	-7,328	JLCPRINX	OWNYH = '100' OR OWNYH = '200'
880320	-	-338	-	-2,175	JLCPRINX	OWNYH = '300'
910050	167	-	264	-	RNTEQVX	OWNYI = '100'
910060	1,972	-	4,805	-	JTSREQX1	
910060	1,841	-	3,371	-	JTSREQX2	
910060	1,972	-	3,411	-	JTSREQX3	
910070	2,959	-	5,941	-	JOTREQX1	
910070	3,000	-	7,235	-	JOTREQX2	
910070	3,000	-	7,749	-	JOTREQX3	
910080	662	-	3,721	-	JTSRNTX1	
910080	204	-	3,362	-	JTSRNTX2	
910080	197	-	3,003	-	JTSRNTX3	

UCC	Critical value +	Critical value -	Topcode value +	Topcode value -	Mapped from	Condition
910090	426	-	1,026	-	JOTRNTX1	
910090	426	-	977	-	JOTRNTX2	
910090	426	-	898	-	JOTRNTX3	

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.

UCC	Critical value +	Critical value -	Mapped from	Condition
550320	-	-150	MEDRMBX	MEDRCARY = '660'
550330	-	-1,995	MEDRMBX	MEDRCARY = '640'
570110	-	-2,260	MEDRMBX	MEDRCARY = '310'
570220	-	-4,500	MEDRMBX	MEDRCARY = '520'
570230	-	-532	MEDRMBX	MEDRCARY = '530'
570240	2,667	-	JFEETOTX	REGFEECR = '2900'
570240	2,667	-	QSPCLX	SPFEECR = '2900'
570901	-	-220	MEDRMBX	MEDRCARY = '650'
570903	-	-285	MEDRMBX	MEDRCARY = '630'
790810	-	-422,000	DISPX	OWNYD = '400' OR OWNYD = '500'
790940	-	-209	QPRINM1X	(OWNYF = '400' OR OWNYF = '500') AND (LOANTYPE = '2')
790940	-	-210	QPRINM2X	(OWNYF = '400' OR OWNYF = '500') AND (LOANTYPE = '2')
790940	-	-212	QPRINM3X	(OWNYF = '400' OR OWNYF = '500') AND (LOANTYPE = '2')
790950	25,000	-	ORGMRTX	(OWNYF = '400' OR OWNYF = '500') AND (LOANTYPE = '2')
820102	-	-165,000	DISPX	OWNYD = '300'
820202	25,000	-	TRUSTX	OWNYD = '300'
830204	-	-281	QPRINM1X	(OWNYF = '300' AND LOANTYPE = '2')
830204	-	-283	QPRINM2X	(OWNYF = '300' AND LOANTYPE = '2')
830204	-	-285	QPRINM3X	(OWNYF = '300' AND LOANTYPE = '2')
830302	267,083	-	ORGMRTX	(OWNYF = '300' AND LOANTYPE = '1')
830304	101,319	-	ORGMRTX	(OWNYF = '300' AND LOANTYPE = '2')
860600	-	-29,000	SALEX	VEHICYC = '160'
880220	-	-54	JLCPRINX	OWNYH = '400' OR OWNYH = '500'

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.

UCC	Description
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
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

UCC	Description
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.

UCC	Critical value +	Critical value -	Topcode value +	Topcode value -
001000	33,333	-	241,056	-
001010	-	-33,333	-	-301,519
001210	33,333	-	66,933	-
001220 (WDBSASTX)	-	-15,000	-	-28,333
001220 (WDBSGDSX)	-	-4,333	-	-18,333
002010	14,333	-10,000	43,746	-22,669
002020	6,667	-5,000	41,139	-26,515
002030	4,333	-2,667	26,111	-4,667
003000	10,000	-3,667	104,778	-12,733
003100	-	-5,000	-	-5,914
900001	830	-	1,517	-
900040	3,900	-	6,127	-
900050	3,000	-	7,320	-
900060	2,250	-572	2,800	-613
900070	2,458	-1,000	5,302	-1,510
900080	2,917	-	5,037	-
900131	1,250	-	1,738	-
900132	2,417	-	3,373	-
900140	2,083	-	15,248	-

UCC	Critical value +	Critical value -	Topcode value +	Topcode value -
910000	8,250	-	15,072	-
910010	417	-	1,771	-
910020	42	-	129	-
910030	667	-	2,546	-
910040	175	-	283	-
910041	600	-	756	-
920010	31,667	-	61,121	-
920020	6,671	-	56,776	-
920030	12,967	-	27,384	-
920040	231,667	-	471,780	-
950000 (FEDTAXX)[1]	1,667		4,381	
950001	-	-417	-	-798
950010 (SLOCTAXX)[2]	417		1,063	
950011	-	-109	-	-219
950021	402	-	1,064	-
950022	375	-	650	-
950023	-	-500	-	-1,169
980020	7.5	-	7.8	-

[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 $1,667.

[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. Create the ITAB VALUE field for these records by dividing FSLTAXX by 12. If FSLTAXX is topcoded, then set VALUE_ to 'T'.. ITAB records for UCC 950010 that represent SLOCTAXX are topcoded for all amounts greater than $417.

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.)

UCC	FMLY variable	Description
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.

Survey Section	File name	Variable	Description
2. A&B.	RNT	QRT3MCMX	Total rental payments made in reference period, adjusted for business and rooms rented to others
		QPK3MCMX	Total paid for parking in reference period
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)?
		TRUSTX	What was the amount of the mortgage you financed?
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	*For confidentiality reasons, records with VEHICYB='190' (private plane) are not included on the public use files.*	
		NETPURX	Amount paid for boat with motor
		If NETPURX is topcoded, then the following variables are suppressed (blanked out) and their flags are given a 'T'.	
		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

Survey Section	File name	Variable	Description
		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
		QDNPYMTX	Amount of down payment, adjusted for business
11. C.	OVC	*For confidentiality reasons, records with VEHICYC='190' (private plane) are not included on the public use files.*	
		SALEX	Amount boat with motor sold for
		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.	
12. A.	VEQ	*For confidentiality reasons, records with VOPVEHYA= '190' (Private plane) are not included on the public use microdata*.	
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

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

Survey Section	File name	Variable	Critical value +	Topcode value +	Condition
2. A&B.	RNT	QRT3MCMX	3,480	4,897	-
		QPK3MCMX	405	818	-
3. B.	OPB	PROPVALX	500,000	959,647	OWNYB = '100' or OWNYB = '200'
		PROPVALX	500,000	911,217	OWNYB = '300'
		PROPVALX	500,000	852,432	OWNYB = '400' or OWNYB = '500'
		OWN_PURX	360,000	576,587	OWNYB = '100' or OWNYB = '200'
		OWN_PURX	189,000	311,250	OWNYB = '300'
		OWN_PURX	215,000	479,360	OWNYB = '400' or OWNYB = '500'
3. D.	OPD	DISPX	318,000	425,000	OWNYD = '100' or OWNYD = '200'
		TRUSTX	25,000	42,000	OWNYF = '100' or OWNYF = '200'
		TRUSTX	25,000	30,000	OWNYF = '400' or OWNYF = '500'
3. F.	MOR	ORGMRTX	234,000	334,742	OWNYF = '100' or OWNYF = '200'
		ORGMRTX	267,083	368,552	OWNYF = '300'
		ORGMRTX	175,000	230,322	OWNYF = '400' or OWNYF = '500'
		MRTPMTX	2,124	3,285	-
		QBLNCM1X	218,758	311,877	-
		QBLNCM2X	218,695	312,058	-
		QBLNCM3X	218,570	315,511	-
		QPRINM1X	669	1,022	OWNYF = '100' or OWNYF = '200'
		QPRINM1X	541	1,336	OWNYF = '300'
		QPRINM1X	706	907	OWNYF = '400' or OWNYF = '500'
		QPRINM2X	667	1,010	OWNYF = '100' or OWNYF = '200'
		QPRINM2X	545	1,346	OWNYF = '300'
		QPRINM2X	713	915	OWNYF = '400' or OWNYF = '500'
		QPRINM3X	671	1,363	OWNYF = '100' or OWNYF = '200'
		QPRINM3X	559	1,489	OWNYF = '300'
		QPRINM3X	720	922	OWNYF = '400' or OWNYF = '500'
3. G.	HEL	ORGMRTG	79,800	111,895	OWNYG = '100' or OWNYG = '200'
		MRTPMTG	1,100	1,567	-
		QBLNCM1G	69,528	98,103	'100' <= OWNYG <= '500'
		QBLNCM2G	69,290	96,917	'100' <= OWNYG <= '500'
		QBLNCM3G	73,793	98,599	'100' <= OWNYG <= '500'

Survey Section	File name	Variable	Critical value +	Topcode value +	Condition
		QPRINM1G	533	669	OWNYG = '100' or OWNYG = '200'
		QPRINM2G	524	664	OWNYG = '100' or OWNYG = '200'
		QPRINM3G	532	679	OWNYG = '100' or OWNYG = '200'
3. H.	OPH	JLCPRINX	7,015	21,984	OWNYH = '100' or OWNYH = '200'
		JLCPRINX	1,014	6,525	OWNYH = '300'
3. I.	OPI	QLR3MCMX	1,310	1,785	OWNYI = '100' or OWNYI = '200'
		QLMPSUMX	2,000	4,210	OWNYI = '100' or OWNYI = '200'
		QLMPSUMX	744	1,675	OWNYI = ‘300’
		QLMPSUMX	750	18,250	OWNYI = '400' or OWNYI = '500'
		RNTEQVX	2,000	3,215	OWNYI = '100' or OWNYI = '200'
		RNTEQVX	2,400	3,800	OWNYI = '300'
		RNTEQVX	700	1,320	OWNYI = '400' or OWNYI = '500'
11. B.	OVB	NETPURX	63,000	84,143	VEHICYB = '160'
15. B.	MDB	MEDPMTX	250	1,013	MEDPCARY = '110'
		MEDPMTX	950	1,646	MEDPCARY = '200'
		MEDPMTX	1,900	4,056	MEDPCARY = '310'
		MEDPMTX	1,500	3,099	MEDPCARY = '320'
		MEDPMTX	400	1,012	MEDPCARY = '410'
		MEDPMTX	350	821	MEDPCARY = '420'
		MEDPMTX	400	1,049	MEDPCARY = '510'
		MEDPMTX	5,000	5,418	MEDPCARY = ‘520’
		MEDPMTX	581	2,450	MEDPCARY = '530'
		MEDPMTX	285	831	MEDPCARY = '630'
		MEDPMTX	425	716	MEDPCARY = '640'
		MEDPMTX	356	425	MEDPCARY = '650'
		MEDPMTX	339	733	MEDPCARY = '660'
15. D.	MDC	MEDRMBX	267	1,532	MEDRCARY = '110'
		MEDRMBX	595	1,015	MEDRCARY = '200'
		MEDRMBX	6,300	21,166	MEDRCARY = '320'
		MEDRMBX	795	1,225	MEDRCARY = '410'
		MEDRMBX	1,050	1,836	MEDRCARY = '420'
		MEDRMBX	200	313	MEDRCARY = '510'
16.	EDA	JEDUCNET	2,849	4,919	EDUC_AY = '310'
18. B&C.	TRV	LDGCOSTX	1,150	2,204	-
18. D.	TRD	TOTYUPDX	466	1,350	TOTYUPDY = '130'
18. E.	TRE	TRNONCUX	688	2,096	TRNONCUY = '130'

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.

Survey Section	File name	Variable	Critical value +	Condition
3. D.	OPD	DISPX	165,000	OWNYD = '300'
		DISPX	422,000	OWNYD = ‘400’ or OWNYD = ‘500’
		TRUSTX	25,000	OWNYF = '300'
3. G.	HEL	ORGMRTG	101,319	OWNYG = '300'
		ORGMRTG	25,000	OWNYG = '400' or OWNYG = '500'
		QPRINM1G	281	OWNYG = '300'
		QPRINM1G	209	OWNYG = '400' or OWNYG = '500'
		QPRINM2G	283	OWNYG = '300'
		QPRINM2G	210	OWNYG = '400' or OWNYG = '500'
		QPRINM3G	285	OWNYG = '300'
		QPRINM3G	212	OWNYG = '400' or OWNYG = '500'

Survey Section	File name	Variable	Critical value +	Condition
3. H.	OPH	JLCPRINX	161	OWNYH = '400' or OWNYH = '500'
3. I.		JFEETOTX	2,500	('100' <= OWNYI <= '300') and REGFEECR = '01000'
		JFEETOTX	8,000	('100' <= OWNYI <= '300') and REGFEECR = '29000'
		QLR3MCMX	1,020	OWNYI = '300'
		QSPCLX	2,500	('100' <= OWNYI <= '300') and SPFEECR = '01000'
		QSPCLX	8,000	('100' <= OWNYI <= '300') and SPFEECR = '29000'
11. C.	OVC	SALEX	29,000	VEHICYC = '160'
15. D.	MDC	MEDRMBX	2,260	MEDRCARY = '310'
		MEDRMBX	4,500	MEDRCARY = '520'
		MEDRMBX	532	MEDRCARY = '530'
		MEDRMBX	285	MEDRCARY = '630'
		MEDRMBX	1,995	MEDRCARY = '640'
		MEDRMBX	220	MEDRCARY = '650'
		MEDRMBX	150	MEDRCARY = '660'

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 1998, they are reporting expenditures for November and December of 1997, and January of 1998. 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 1998 contains expenditure data collected in interviews that took place in April, May, and June of 1998. Referring to the rotation chart, one can see that this MTAB file contains expenditures made between January 1998 and May 1998. Similarly, the MTAB file for the third quarter of 1998 (interviews conducted between July and September) contains expenditures made between April and July 1998. To obtain all expenditures made in January 1998, one should access the MTAB files for both the first and second quarters of 1998. The MTAB file for the first quarter of 1998 would contain January expenditures made by CUs interviewed in February and March 1998, while the MTAB file for the second quarter of 1998 would contain January expenditures made by CUs interviewed in April 1998.

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 1998 based on collection period, that is, from all interviews conducted in 1998, data users need data only from Q981 through Q984 files. However, to produce a 1998 annual estimate based on expenditures made in 1998 (calendar period), one needs to access five collection-quarter files, the first quarter of 1998 through the first quarter of 1999. (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 1998, 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 VARIABLE	AMOUNT	UCC	ITAB AMOUNT	MONTH
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 1998 is 5,614 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 1998. 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 1998). 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 1998 estimate would be based on data from interviews over five quarters. MO_SCOPE would take on the following values:

	Interview Month and Year								
	1998				**1998**				
	Jan	*Feb*	*Mar*	*Apr*	*May*	*Jun*	*Jul*	*Aug*	*Sep*
MO_SCOPE	0	1	2	3	3	3	3	3	3
			1998	**1999**		**1999**			
	Oct	*Nov*	*Dec*	*Jan*	*Feb*	*Mar*			
MO_SCOPE	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 1998, 2/3 the independent sample for the first quarter of 1999, and one independent sample for the second, third, and fourth quarters of 1998. 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:

$_{UK}\overline{X}_{(S,x)(q,m)}$ = 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

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

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

$_{UC}\overline{X}_{(S,x)(q,r)}$ = 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

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

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.

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:

${}_{WK}\overline{X}_{(S,x)(q,m)}$ = 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

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

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

${}_{WC}\overline{X}_{(S,x)(q,r)}$ = 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

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

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 a^{th} replicate

and,

${}_{AK}\overline{X}_{(S,x)(q,m),a}$ = 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 a^{th} replicate

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

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

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

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

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

2. ***STANDARD ERROR OF THE MEAN***

The standard error of the mean, $S.E.(\overline{X})$, is used to obtain confidence intervals that evaluate how close the estimate may be to the true population mean. $S.E.(\overline{X})$ is defined as the square root of the variance of the mean. For example, the weighted calendar period mean expenditure for total food by complete income reporters in 1998 was $4,921.74. The standard error for this estimate is $48.82. A 95 percent confidence interval can be constructed around this estimate, bounded by values two times the standard error less than and greater than the estimate, that is, from $4,824.10 to $5,019.38. We could conclude with 95 percent confidence that the true population mean expenditure for food for total complete income reporters in 1998 lies within the interval $4,824.10 to $5,019.38.

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 1998 mean expenditure for apparel and services for complete income reporters in the second income quintile was $816.25 and for complete income reporters in the third income quintile was $1,145.61. The apparent difference between the two mean expenditures is $1,145.61 – $816.25 = $329.36. The standard error on the estimate of $816.25 is $32.08 and the estimated standard error for $1,145.61 is $34.51.

The standard error of a difference is approximately equal to

$$S.E.\left({}_{WC}\overline{X}_1, {}_{WC}\overline{X}_2\right) = \sqrt{\left(V\left({}_{WC}\overline{X}_1\right) + V\left({}_{WC}\overline{X}_2\right)\right)} \tag{1}$$

where

$$V(\overline{X}_i) = \left(S.E.(\overline{X}_i)\right)^2$$

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

$$\sqrt{\left((32.08)^2 + (34.51)^2\right)} = 47.12 \tag{2}$$

This means that the 95 percent confidence interval around the difference is from $235.12 to $423.60. Since this interval does not include zero, we can conclude with 95 percent confidence that the mean apparel and services expenditures for the third income quintile group of complete income reporters is greater than the mean apparel and services expenditures for the second income quintile group.

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

$$S.E.\left({}_W\overline{X}_1, {}_W\overline{X}_2\right) = \sqrt{\left(V\left({}_W\overline{X}_1\right) + V\left({}_W\overline{X}_2\right) - 2r\left(V\left({}_W\overline{X}_1\right) * V\left({}_W\overline{X}_2\right)\right)\right)} \qquad (3)$$

where

$$V(\overline{X}_i) = \left(S.E.(\overline{X}_i)\right)^2$$

and where r is the correlation coefficient between ${}_W\overline{X}_1$ and ${}_W\overline{X}_2$. 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 utilizes the ASCII data sets available on this CD-ROM. A program written in SAS but utilizing the SAS data sets is also present on the CD-ROM but will not be referenced here. Refer to the table following the program 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 AGG and LABEL processing files 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

```
1
2
3  %let y =98;
4
5  %let y2=%eval(&y+1);
6
7
```

Line 3 sets the year as a macro variable that can be used throughout the program. Line 5 sets another macro variable as the year plus one.

```
8  filename fmly1 "x:\intrvw&y\fmlyi&y.1x.txt";
9  filename fmly2 "x:\intrvw&y\fmlyi&y.2.txt";
10  filename fmly3 "x:\intrvw&y\fmlyi&y.3.txt";
11  filename fmly4 "x:\intrvw&y\fmlyi&y.4.txt";
12  filename fmly5 "x:\intrvw&y\fmlyi&y2.1.txt";
13
14  filename mtab1 "x:\intrvw&y\mtabi&y.1x.txt";
15  filename mtab2 "x:\intrvw&y\mtabi&y.2.txt";
16  filename mtab3 "x:\intrvw&y\mtabi&y.3.txt";
17  filename mtab4 "x:\intrvw&y\mtabi&y.4.txt";
18  filename mtab5 "x:\intrvw&y\mtabi&y2.1.txt";
19
20  filename itab1 "x:\intrvw&y\itabi&y.1x.txt";
21  filename itab2 "x:\intrvw&y\itabi&y.2.txt";
22  filename itab3 "x:\intrvw&y\itabi&y.3.txt";
23  filename itab4 "x:\intrvw&y\itabi&y.4.txt";
24  filename itab5 "x:\intrvw&y\itabi&y2.1.txt";
25
```

Lines 8-24 designate the location of the data on the CD-ROM.

```
26  filename agg "x:\intrvw&y\aggi&y..txt";
27  filename labls "x:\intrvw&y\labeli&y..txt";
28
29
```

Lines 26-27 designate the location of the two processing files.

```
30  options linesize=153 pagesize=52 missing='';
31
32
33
34
```

Line 30 forces the output to be printed landscape.

```
35  data fmly1;
36    infile fmly1 lrecl=3461;
37    input @1 newid 8. @331 finlwt21 11.3 @663 qintrvmo
$2.
38         @3324 inclass $2.;

NOTE: The infile FMLY1 is:
    FILENAME=x:\intrvw98\fmlyi981x.txt,
    RECFM=V,LRECL=3461

NOTE: 5614 records were read from the infile FMLY1.
    The minimum record length was 3461.
    The maximum record length was 3461.
NOTE: The data set WORK.FMLY1 has 5614 observations
and 4 variables.


39    proc sort; by newid;
40
```

Lines 35-63 pull in the necessary variables from the fmly files. Newid is the code given to a consumer unit each time it participates. Finlwt21 will be used to weight each consumer unit such that it represents some portion of the population. Qintrvmo is the month that the consumer unit was interviewed. Inclass is a code that represents the range within which the consumer unit's annual income falls.

```
NOTE: The data set WORK.FMLY1 has 5614 observations
and 4 variables.


41  data fmly2;
42    infile fmly2 lrecl=3461;
43    input @1 newid 8. @331 finlwt21 11.3 @663 qintrvmo
$2.
44          @3324 inclass $2.;

NOTE: The infile FMLY2 is:
    FILENAME=x:\intrvw98\fmlyi982.txt,
    RECFM=V,LRECL=3461

NOTE: 5467 records were read from the infile FMLY2.
    The minimum record length was 3461.
    The maximum record length was 3461.
NOTE: The data set WORK.FMLY2 has 5467 observations
and 4 variables.


45    proc sort; by newid;
46

NOTE: The data set WORK.FMLY2 has 5467 observations
and 4 variables.


47  data fmly3;
48    infile fmly3 lrecl=3461;
49    input @1 newid 8. @331 finlwt21 11.3 @663 qintrvmo
$2.
50          @3324 inclass $2.;

NOTE: The infile FMLY3 is:
    FILENAME=x:\intrvw98\fmlyi983.txt,
    RECFM=V,LRECL=3461

NOTE: 5527 records were read from the infile FMLY3.
    The minimum record length was 3461.
    The maximum record length was 3461.
NOTE: The data set WORK.FMLY3 has 5527 observations
and 4 variables.


51    proc sort; by newid;
52

NOTE: The data set WORK.FMLY3 has 5527 observations
and 4 variables.


53  data fmly4;
54    infile fmly4 lrecl=3461;
55    input @1 newid 8. @331 finlwt21 11.3 @663 qintrvmo
$2.
```

```
56         @3324 inclass $2.;

NOTE: The infile FMLY4 is:
     FILENAME=x:\intrvw98\fmlyi984.txt,
     RECFM=V,LRECL=3461

NOTE: 5569 records were read from the infile FMLY4.
     The minimum record length was 3461.
     The maximum record length was 3461.
NOTE: The data set WORK.FMLY4 has 5569 observations
and 4 variables.

57    proc sort; by newid;
58

NOTE: The data set WORK.FMLY4 has 5569 observations
and 4 variables.


59  data fmly5;
60    infile fmly5 lrecl=3461;
61    input @1 newid 8. @331 finlwt21 11.3 @663 qintrvmo
$2.
62         @3324 inclass $2.;

NOTE: The infile FMLY5 is:
     FILENAME=x:\intrvw98\fmlyi991.txt,
     RECFM=V,LRECL=3461

NOTE: 5614 records were read from the infile FMLY5.
     The minimum record length was 3461.
     The maximum record length was 3461.
NOTE: The data set WORK.FMLY5 has 7015 observations
and 4 variables.


63    proc sort; by newid;
64
65

NOTE: The data set WORK.FMLY5 has 7015 observations
and 4 variables.


66  data fmlyall(drop=qintrvmo );
67    set fmly1(in=in1) fmly2 fmly3 fmly4 fmly5(in=in5);
68      by newid;
```

Lines 66-68 bring each of the 5 quarters of fmly data sets together.

```
69    if in1 then mo_scope=qintrvmo-1;
70    else if in5 then mo_scope=4-qintrvmo;
71    else mo_scope=3;
72    uspop = finlwt21 * mo_scope/12;

NOTE: Character values have been converted to numeric
values at the places given by: (Line):(Column).
     69:25   70:32
```

Lines 69-71 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 finwt21 to determine uspop. Uspop is the weight each family will be given to inflate the values they report to a national level. NOTE: More

The data set WORK.FMLYALL has 29192 observations and 5 variables.

information on mo_scope can be found in the ESTIMATION PROCEDURES section of this documentation.

```
73     proc sort; by newid;
```

NOTE: The data set WORK.FMLYALL has 29192 observations and 5 variables.

```
74     proc datasets;
75                  delete fmly1 fmly2 fmly3 fmly4 fmly5;
```

Lines 74-75 delete from memory the data sets that are no longer necessary for processing.

NOTE: Deleting WORK.FMLY1 (memtype=DATA).
NOTE: Deleting WORK.FMLY2 (memtype=DATA).
NOTE: Deleting WORK.FMLY3 (memtype=DATA).
NOTE: Deleting WORK.FMLY4 (memtype=DATA).
NOTE: Deleting WORK.FMLY5 (memtype=DATA).

```
76     proc summary nway data = fmlyall;
77       class inclass;
78       var uspop;
79       output out = newpop sum = popus;
80
```

Lines 76-90 create the total population weights by income group that will be used as the denominator in calculating the average annual expenditures later in the program and prints them.

NOTE: The data set WORK.NEWPOP has 10 observations and 4 variables.

```
81     proc transpose data = newpop out = transpop prefix =
pop;
82       var popus;
83
84
```

Lines 81-82 transpose the newpop data set to match the format of the PUBRAY data set that it will be matched with later in the program.

NOTE: The data set WORK.TRANSPOP has 1 observations and 11 variables.

```
85  data subagg (drop = _name_);
86     set transpop;
          87      popt = sum (of pop1-pop10);
          88      popc = sum (of pop1-pop9);
```

Lines 85-88 take the transposed data set and calculate popt, the all consumer units population, and popc, the all complete income reporters population.

NOTE: The data set WORK.SUBAGG has 1 observations and 12 variables.

```
89     proc print data=subagg;
90     title "Population Counts for 19&y";
91
```

```
92  data mtab1;
93    infile mtab1 lrecl=35;
94    input @1 newid 8. @9 ucc $6. @15 cost 12.4
```

Lines 92-125 pull in the mtab files. Newid is the consumer unit code. Ucc is a code that represents the type of expenditure

```
      @32 ref_yr $4.;
   if ref_yr="19&y";

NOTE: The infile MTAB1 is:
   FILENAME=x:\intrvw98\mtabi981x.txt,
   RECFM=V,LRECL=35

NOTE: 535319 records were read from the infile MTAB1.
   The minimum record length was 35.
   The maximum record length was 35.
NOTE: The data set WORK.MTAB1 has 175348
observations and 4 variables.


   proc sort; by newid;

NOTE: The data set WORK.MTAB1 has 175348
observations and 4 variables.


data mtab2;
   infile mtab2 lrecl=35;
   input @1 newid 8. @9 ucc $6. @15 cost 12.4
      @32 ref_yr $4.;
   if ref_yr="19&y";

NOTE: The infile MTAB2 is:
   FILENAME=x:\intrvw98\mtabi982.txt,
   RECFM=V,LRECL=35

NOTE: 488523 records were read from the infile MTAB2.
   The minimum record length was 35.
   The maximum record length was 35.
NOTE: The data set WORK.MTAB2 has 488523
observations and 4 variables.


   proc sort; by newid;

NOTE: The data set WORK.MTAB2 has 488523
observations and 4 variables.


data mtab3;
   infile mtab3 lrecl=35;
   input @1 newid 8. @9 ucc $6. @15 cost 12.4
      @32 ref_yr $4.;
   if ref_yr="19&y";

NOTE: The infile MTAB3 is:
   FILENAME=x:\intrvw98\mtabi983.txt,
   RECFM=V,LRECL=35

NOTE: 503079 records were read from the infile MTAB3.
```

variable. Cost is the value that corresponds to the ucc code. Ref_yr is the reference year of the expenditure. Ref_yr is set such that any expenditures outside of the desired reference year are excluded.

```
     The minimum record length was 35.
     The maximum record length was 35.
NOTE: The data set WORK.MTAB3 has 503079
observations and 4 variables.


111      proc sort; by newid;
112

NOTE: The data set WORK.MTAB3 has 503079
observations and 4 variables.


113  data mtab4;
114      infile mtab4 lrecl=35;
115      input @1 newid 8. @9 ucc $6. @15 cost 12.4
116            @32 ref_yr $4.;
117      if ref_yr="19&y";

NOTE: The infile MTAB4 is:
     FILENAME=x:\intrvw98\mtabi984.txt,
     RECFM=V,LRECL=35

NOTE: 504667 records were read from the infile MTAB4.
     The minimum record length was 35.
     The maximum record length was 35.
NOTE: The data set WORK.MTAB4 has 504667
observations and 4 variables.


118      proc sort; by newid;
119

NOTE: The data set WORK.MTAB4 has 504667
observations and 4 variables.


120  data mtab5;
121      infile mtab5 lrecl=35;
122      input @1 newid 8. @9 ucc $6. @15 cost 12.4
123            @32 ref_yr $4.;
124      if ref_yr="19&y";

NOTE: The infile MTAB5 is:
     FILENAME=x:\intrvw98\mtabi991.txt,


RECFM=V,LRECL=35

NOTE: 661414 records were read from the infile MTAB5.
     The minimum record length was 35.
     The maximum record length was 35.
NOTE: The data set WORK.MTAB5 has 420711
observations and 4 variables.
```

```
125     proc sort; by newid;
126

NOTE: The data set WORK.MTAB5 has 420711
observations and 4 variables.
```

```
127  data mtaball(drop=ref_yr);
128     set mtab1 mtab2 mtab3 mtab4 mtab5;
129       by newid;
```

Lines 127-129 bring the 5 quarters of mtab data sets together.

```
NOTE: The data set WORK.MTABALL has 2092328
observations and 3 variables.


130     proc sort; by newid;

NOTE: The data set WORK.MTABALL has 2092328
observations and 3 variables.
```

```
131     proc datasets;
132                 delete mtab1 mtab2 mtab3 mtab4 mtab5;
133
```

Lines 131-132 delete from memory the data sets that are no longer necessary for processing.

```
NOTE: Deleting WORK.MTAB1 (memtype=DATA).
NOTE: Deleting WORK.MTAB2 (memtype=DATA).
NOTE: Deleting WORK.MTAB3 (memtype=DATA).
NOTE: Deleting WORK.MTAB4 (memtype=DATA).
NOTE: Deleting WORK.MTAB5 (memtype=DATA).
```

```
134  data itab1 ;
135     infile itab1 lrecl=35;
136     input @1 newid 8. @15 ucc $6. @22 value 12.4
137          @11 refyr $4.;
138     if refyr="19&y";

NOTE: The infile ITAB1 is:
     FILENAME=x:\intrvw98\itabi981x.txt,
     RECFM=V,LRECL=35
```

Lines 134-167 pull in the itab/income files. Newid is the consumer unit code. Ucc is a code that represents the type of expenditure variable. Value is the value that corresponds to the ucc code. Refyr is the reference year of the expenditure. Refyr is set such that any values outside of the desired reference year are excluded.

```
NOTE: 292374 records were read from the infile ITAB1.
     The minimum record length was 35.
     The maximum record length was 35.
NOTE: The data set WORK.ITAB1 has 97508 observations
and 4 variables.


139     proc sort; by newid;
140

NOTE: The data set WORK.ITAB1 has 97508 observations
and 4 variables.
```

```
data itab2 ;
   infile itab2 lrecl=35;
   input @1 newid 8. @15 ucc $6. @22 value 12.4
       @11 refyr $4.;
   if refyr="19&y";

NOTE: The infile ITAB2 is:
    FILENAME=x:\intrvw98\itabi982.txt,
    RECFM=V,LRECL=35

NOTE: 285732 records were read from the infile ITAB2.
    The minimum record length was 35.
    The maximum record length was 35.


   proc sort; by newid;


NOTE: The data set WORK.ITAB2 has 285732
observations and 4 variables.


data itab3 ;
   infile itab3 lrecl=35;
   input @1 newid 8. @15 ucc $6. @22 value 12.4
       @11 refyr $4.;
   if refyr="19&y";

NOTE: The infile ITAB3 is:
    FILENAME=x:\intrvw98\itabi983.txt,
    RECFM=V,LRECL=35

NOTE: 286839 records were read from the infile ITAB3.
    The minimum record length was 35.
    The maximum record length was 35.
NOTE: The data set WORK.ITAB3 has 286839
observations and 4 variables.


   proc sort; by newid;


NOTE: The data set WORK.ITAB3 has 286839
observations and 4 variables.


data itab4 ;
   infile itab4 lrecl=35;
   input @1 newid 8. @15 ucc $6. @22 value 12.4
       @11 refyr $4.;
   if refyr="19&y";


   proc sort; by newid;

```

```
NOTE: The infile ITAB4 is:
     FILENAME=x\intrvw98\itabi984.txt,
     RECFM=V,LRECL=35

NOTE: 286020 records were read from the infile ITAB4.
     The minimum record length was 35.
     The maximum record length was 35.
NOTE: The data set WORK.ITAB4 has 286020
observations and 4 variables.
NOTE: The data set WORK.ITAB4 has 286020
observations and 4 variables.


162  data itab5 ;
163     infile itab5 lrecl=35;
164     input @1 newid 8. @15 ucc $6. @22 value 12.4
165          @11 refyr $4.;
166     if refyr="19&y";

NOTE: The infile ITAB5 is:
     FILENAME=x:\intrvw98\itabi991.txt,
     RECFM=V,LRECL=35

NOTE: 360804 records were read from the infile ITAB5.
     The minimum record length was 35.
     The maximum record length was 35.
NOTE: The data set WORK.ITAB5 has 227148
observations and 4 variables.


167     proc sort; by newid;
168

NOTE: The data set WORK.ITAB5 has 227148
observations and 4 variables.


169  data itaball(drop=refyr rename=(value=cost));
170     set itab1 itab2 itab3 itab4 itab5;
171       by newid;

NOTE: The data set WORK.ITABALL has 1183247
observations and 3 variables.
```

Lines 169-171 bring all 5 quarters of itab data sets together. The variable value is renamed cost so that it can be merged with the mtab data sets later in the program.

```
172     proc sort; by newid;

NOTE: The data set WORK.ITABALL has 1183247
observations and 3 variables.


173     proc datasets;
174               delete itab1 itab2 itab3 itab4 itab5;

NOTE: Deleting WORK.ITAB1 (memtype=DATA).
NOTE: Deleting WORK.ITAB2 (memtype=DATA).
```

Lines 173-174 delete from memory the data sets that are no longer necessary for processing.

```
NOTE: Deleting WORK.ITAB3 (memtype=DATA).
NOTE: Deleting WORK.ITAB4 (memtype=DATA).
NOTE: Deleting WORK.ITAB5 (memtype=DATA).


175  data expend ;
176    set mtaball itaball;
177     by newid;
178     if ucc='710110' then cost=cost*4;

NOTE: The data set WORK.EXPEND has 3275575
observations and 3 variables.
```

Lines 175-178 pull the mtaball and itaball data sets together. One ucc must be adjusted because only one-fourth of all consumer units interviewed in a quarter are asked this question (those in the 5^{th} interview).

```
179     proc sort; by newid;

NOTE: The data set WORK.EXPEND has 3275575
observations and 3 variables.


180     proc datasets;
181                 delete mtaball itaball;
182

NOTE: Deleting WORK.MTABALL (memtype=DATA).
NOTE: Deleting WORK.ITABALL (memtype=DATA).
```

Lines 180-181 delete from memory the data sets no longer needed for processing.

```
183  data pubfile;
184      merge fmlyall (in = infam drop=mo_scope)
185           expend  (in = inexp)
186           ;
187      by newid ;
188      if cost='.' then cost=0;
189      wcost = finlwt21 * cost;
190      if not inexp then delete;
191

NOTE: Character values have been converted to numeric
values at the places given by: (Line):(Column).
     188:13
NOTE: The data set WORK.PUBFILE has 3275575
observations and 7 variables.
```

Lines 183-190 merge the fmlyall and expend data sets together and check the cost variable to make sure there are no missing values.

Line 189 weights the cost variable up to the population level that the consumer unit represents.

```
192      proc summary nway data = pubfile;
193       class ucc inclass;
194       var wcost;
195       output out = aggcst sum = wcost;

NOTE: The data set WORK.AGGCST has 6071
observations and 5 variables.
```

Lines 192-195 sum the weighted costs for the consumer units for each ucc by income group and outputs this as a new data set called aggcst.

```
196      proc datasets;
197                  delete expend;
```

Lines 196-197 delete from memory any data sets that are no longer needed for processing.

```
NOTE: Deleting WORK.EXPEND (memtype=DATA).


198  data aggray (drop = inclass _type_  _freq_ wcost);
199    set aggcst;
200     by ucc ;
201        array trncost grp1-grp10;
202         retain grp1-grp10;
203        if first.ucc then do over trncost;
204           trncost = 0;
205        end;
206        _I_=inclass;
207        trncost=wcost;
208        if last.ucc then output;
209
```

Lines 198-208 create the variables grp1-grp10 that will designate the income groups and then places the weighted cost, or expenditure, data into the appropriate new variable.

```
NOTE: Character values have been converted to numeric
values at the places given by: (Line):(Column).
     206:13
NOTE: The data set WORK.AGGRAY has 677 observations
and 11 variables.


210  data agfile;
211      infile agg lrecl=20;
212        input @3 ucc $6.  @10 gift $1.
213              @15 line $6.;
214      if gift='2';
```

Lines 210-214 pull in the file that dictates how each ucc will be summed for aggregation.

```
NOTE: The infile AGG is:
     FILENAME=x:\intrvw98\aggi98.txt,
     RECFM=V,LRECL=20

NOTE: 4882 records were read from the infile AGG.
     The minimum record length was 0.
     The maximum record length was 20.
NOTE: The data set WORK.AGFILE has 2203 observations
and 3 variables.


215      proc sort data = agfile;
216      by ucc ;
217

NOTE: The data set WORK.AGFILE has 2203 observations
and 3 variables.


218  data pubray ;
219      merge aggray (in = inray)
220            agfile (in = inagg);
221        by ucc;
222      if inray and inagg;
223
```

Lines 218-222 merge the data set containing the weighted costs and the agfile. The agfile will give all costs a code called line that will be used for aggregation.

NOTE: The data set WORK.PUBRAY has 2011 observations and 13 variables.

```
224      proc summary nway data = pubray;
225        class line;
226        var grp1-grp10;
227        output out = aggsum sum = ;
228
229
```

Lines 224-227 sum the weighted costs for each income group (grp1-grp10) by line and output this into a new data set called aggsum.

NOTE: The data set WORK.AGGSUM has 231 observations and 13 variables.

```
230  data cstpop1 (drop = _type_ _freq_ popt popc pop1-
                             pop10);
231      if _n_ = 1 then set subagg;
232      set aggsum;
233        grpt = sum (of grp1-grp10);
234        grpc = sum (of grp1-grp9);
235      array ex grpt grpc grp1-grp10;
236      array wt popt popc pop1-pop10;
237       do over ex;
238         ex = ex/wt;
239       end;
240
```

Lines 230-239 create two arrays. One array is a vector from the subagg data set that contains the population counts (popt, popc, pop1-pop10). The other is a matrix of the weighted costs by income group. The costs are divided by the population counts.

NOTE: The data set WORK.CSTPOP1 has 231 observations and 13 variables.
NOTE: The DATA statement used 0.48 seconds.

```
241  data numcus (rename=(popt=grpt popc=grpc
pop1=grp1 pop2=grp2
242                  pop3=grp3 pop4=grp4 pop5=grp5
pop6=grp6
243                  pop7=grp7 pop8=grp8 pop9=grp9
pop10=grp10));
244      set subagg;
245      line='000000';
246
```

Lines 241-249 give the population counts a line value so that they can be printed as part of the final output, and then brings them together with the summed cost data set that was calculated with the arrays.

NOTE: The data set WORK.NUMCUS has 1 observations and 13 variables.

```
247  data cstpop;
248      set numcus cstpop1;
249      by line;
250
```

NOTE: The data set WORK.CSTPOP has 232 observations and 13 variables.

```
251  data addlab;
252       infile labls lrecl=57;
253       input @1 line $6. @8 title $char50.;
254

NOTE: The infile LABLS is:
      FILENAME=x:\intrvw98\labeli98.txt,
      RECFM=V,LRECL=57

NOTE: 116 records were read from the infile LABLS.
      The minimum record length was 57.
      The maximum record length was 57.
NOTE: The data set WORK.ADDLAB has 116 observations
and 2 variables.
```

Lines 251-254 pull in the label file that will put titles on the final output.

```
255  data pubtab (drop = line);
256       merge cstpop (in = inline)
257            addlab (in = inlabl);
258       by line;
259       if not inlabl then delete;
260

NOTE: The data set WORK.PUBTAB has 116 observations
and 13 variables.
```

Lines 255-283 merge the summed cost data set with the titles for printing. The output is formatted and the income groups are given labels. Note that not all groups are printed – the incomplete reporters (grp10) and all consumer units (grpt).

```
261       proc print split='*' uniform;
262        label
263        grpt='      All* Consumer*    Units*__________'
264        grpc='    Total* Complete*Reporting*__________'
265        grp1='     Less*     Than*   $5,000*__________'
266        grp2='   $5,000*       To*   $9,999*__________'
267        grp3='  $10,000*       To*  $14,999*__________'
268        grp4='  $15,000*       To*  $19,999*__________'
269        grp5='  $20,000*       To*  $29,999*__________'
270        grp6='  $30,000*       To*  $39,999*__________'
271        grp7='  $40,000*       To*  $49,999*__________'
272        grp8='  $50,000*       To*  $69,999*__________'
273        grp9='  $70,000*      And*     Over*__________'
274       grp10='Incomplete*
Income*Reporters*__________';
275       format title $char40.;
     276       format grpt grpc grp1-grp10 comma9.2;
277       id title;
                278       var grpc grp1-grp9;
279       title "CE Interview Survey Microdata: Average
Annual Expenditures for Calendar Year 19&y by Income";
280       title2 ' ';
281       title3 ' ';
282
283
284   run;
```

NOTE: At least one W.D format was too small for the number to be printed. The decimal may be shifted by the "BEST" format.

B. OUTPUT

The following observation shows the contents of the subagg data set created in lines 85-88. It represents the weighted number of CUs in each INCLASS category as well as for the total population and the population of complete income reporters.

Population Counts for 1998

OBS	POP1	POP2	POP3	POP4	POP5	POP6	POP7	POP8	POP9	POP10	POPT	POPC
1	4258733.98	8143392.82	8468880.26	7352389.18	12621121.63	10122912.25	7653998.09	11300431.43	14193342.41	23066889.85	107182091.91	84115202.06

The table that follows represents printed output of the PUBTAB data set.

CE Interview Survey Microdata: Average Annual Expenditures for Calendar Year 1998 by Income

TITLE	Total Complete Reporting	Less Than $5,000	$5,000 To $9,999	$10,000 To $14,999	$15,000 To $19,999	$20,000 To $29,999	$30,000 To $39,999	$40,000 To $49,999	$50,000 To $69,999	$70,000 And Over
Number of consumer units	84115202	4258734.0	8143392.8	8468880.3	7352389.2	12621122	10122912	7653998.1	11300431	14193342
Consumer unit characteristics:										
Income before taxes	41,600.06	2,252.09	7,726.48	12,374.16	17,440.88	24,587.75	34,487.03	44,320.01	58,665.83	107941.49
Income after taxes	38,313.54	2,126.54	7,628.22	12,121.26	16,894.48	23,523.11	32,424.19	40,963.80	53,833.04	97,067.89
Age of reference person	47.67	37.77	54.78	55.46	52.26	48.54	45.26	44.25	43.81	45.39
Average number in consumer unit:										
Persons	2.49	1.79	1.68	1.93	2.24	2.43	2.55	2.72	3.00	3.10
Children under 18	0.67	0.47	0.37	0.46	0.57	0.64	0.69	0.79	0.90	0.85
Persons 65 and over	0.31	0.15	0.46	0.54	0.58	0.42	0.28	0.17	0.14	0.10
Earners	1.34	0.86	0.54	0.70	0.86	1.19	1.41	1.64	1.87	2.10
Vehicles	1.98	1.00	0.92	1.27	1.50	1.85	2.11	2.33	2.61	2.91
Percent distribution:										
Sex of reference person:										
Male	57.88	42.87	33.89	39.85	51.25	58.28	63.64	64.61	69.10	73.31
Female	42.12	57.13	66.11	60.15	48.75	41.72	36.36	35.39	30.90	26.69
Housing tenure:										
Homeowner	63.77	26.29	40.05	50.15	54.94	58.71	64.36	70.66	79.85	88.92
Renter	36.22	73.71	59.95	49.85	45.06	41.29	35.64	29.34	20.15	11.08
Race of reference person:										
Black	10.55	15.97	17.69	13.48	11.71	12.55	9.26	9.26	6.75	5.33
White and other	89.45	84.03	82.31	86.52	88.29	87.45	90.74	90.74	93.25	94.67
Education of reference person:										
Elementary (1-8)	6.84	6.57	19.56	14.46	11.77	7.38	4.16	2.25	1.51	0.67
High school (9-12)	38.22	43.84	48.38	49.66	48.99	45.75	39.75	34.43	29.55	19.46
College	54.58	48.86	30.37	35.56	38.69	46.61	56.04	63.27	68.78	79.83
Never attended and other	0.36	0.73	1.69	0.32	0.55	0.27	0.05	0.05	0.15	0.04
At least one vehicle owned or leased .	87.44	58.19	59.09	76.33	87.35	90.46	95.03	96.49	97.74	97.96
At least one vehicle owned	85.77	57.76	58.69	75.45	86.05	88.73	93.18	94.72	95.51	95.24
At least one vehicle leased	5.75	0.72	0.76	1.69	2.30	3.78	4.03	6.08	9.94	13.78
Average annual expenditures	35,257.57	16,416.25	13,887.78	19,263.75	22,218.27	26,497.93	31,709.19	37,304.09	46,215.59	69,961.50
Food	4,921.74	2,939.66	2,687.41	3,339.62	3,790.58	4,204.49	4,763.73	5,263.26	6,001.36	8,035.15

CE Interview Survey Microdata: Average Annual Expenditures for Calendar Year 1998 by Income

TITLE	Total Complete Reporting	Less Than $5,000	$5,000 To $9,999	$10,000 To $14,999	$15,000 To $19,999	$20,000 To $29,999	$30,000 To $39,999	$40,000 To $49,999	$50,000 To $69,999	$70,000 And Over
Food at home	3,510.24	2,168.71	2,218.92	2,689.91	2,984.84	3,218.01	3,471.99	3,766.49	4,186.09	5,026.17
Food away from home	1,411.50	770.95	468.49	649.70	805.74	986.48	1,291.74	1,496.76	1,815.26	3,008.99
Alcoholic beverages	297.21	197.93	108.57	154.88	167.10	217.75	293.86	337.46	370.48	580.57
Housing	10,920.46	5,771.76	5,241.37	6,815.63	7,435.24	8,500.58	9,976.16	11,028.06	13,345.74	20,814.74
Shelter	6,722.69	3,765.79	3,052.59	4,212.74	4,526.46	5,072.05	6,171.53	6,704.00	8,236.95	13,016.26
Owned dwellings	4,241.25	1,369.59	1,015.34	1,741.60	1,865.27	2,421.51	3,465.11	4,168.72	6,016.22	10,473.69
Mortgage interest and charge	2,465.89	699.12	307.82	585.38	586.60	1,100.92	1,986.70	2,516.51	3,877.71	6,733.97
Property taxes	989.16	324.09	374.75	535.62	670.73	687.94	772.68	920.22	1,206.60	2,263.14
Maintenance, repairs, insura	786.19	346.37	332.77	620.60	607.94	632.66	705.73	731.99	931.91	1,476.58
Rented dwellings	2,021.01	2,123.48	1,922.18	2,244.77	2,441.44	2,430.02	2,441.19	2,162.79	1,680.97	1,226.54
Other lodging	460.43	272.72	115.07	226.37	219.75	220.52	265.23	372.49	539.76	1,316.03
Utilities, fuels, and public servi	2,381.73	1,366.21	1,537.26	1,751.64	1,971.79	2,202.84	2,361.73	2,564.57	2,827.46	3,479.11
Natural gas	278.01	138.91	192.82	204.56	241.28	266.03	253.72	292.24	324.23	414.97
Electricity	903.81	535.44	621.63	710.56	773.16	853.18	916.17	980.32	1,043.27	1,243.15
Fuel oil and other fuels	89.03	48.22	56.44	70.11	84.49	87.42	86.97	95.71	106.48	119.01
Telephone services	826.29	525.21	512.94	584.04	649.36	743.76	830.04	901.91	991.95	1,230.63
Water and other public services	284.59	118.43	153.43	182.37	223.50	252.45	274.83	294.40	361.55	471.35
Household operations	560.47	163.63	259.81	278.96	268.63	316.79	386.30	509.87	682.24	1,442.42
Personal services	269.95	67.41	145.69	117.94	109.34	144.38	189.55	287.94	375.18	651.42
Other household expenses	290.52	96.22	114.13	161.02	159.29	172.41	196.75	221.92	307.06	791.00
Housefurnishings and equipment	1,255.58	476.12	391.70	572.29	668.36	908.89	1,056.59	1,249.62	1,599.09	2,876.94
Household textiles	82.34	35.11	31.46	36.53	50.03	60.05	63.03	73.76	91.17	200.98
Furniture	386.84	117.83	87.40	166.29	201.93	311.21	337.84	351.14	425.88	957.10
Floor coverings	58.14	27.43	19.14	26.99	32.99	51.40	38.96	28.82	65.57	150.89
Major appliances	162.17	76.81	60.64	112.16	117.14	130.20	155.70	137.61	224.55	295.84
Small appliances, misc. housewa	60.06	27.09	25.73	27.23	41.75	53.61	52.38	60.99	71.07	120.68
Miscellaneous household equipme	506.03	191.86	167.33	203.08	224.51	302.43	408.69	597.29	720.83	1,151.46
Apparel and services	1,353.91	791.57	498.45	649.73	846.81	962.05	1,234.09	1,354.59	1,607.07	2,928.32
Men and boys	343.97	203.21	90.33	136.63	182.68	239.47	312.33	368.06	434.06	769.77
Men, 16 and over	265.29	159.78	63.07	105.38	126.21	181.93	236.59	272.87	334.68	615.66
Boys, 2 to 15	78.69	43.43	27.27	31.25	56.47	57.54	75.74	95.19	99.38	154.11
Women and girls	517.33	308.47	185.21	262.31	341.83	371.51	455.53	493.75	604.52	1,130.67
Women, 16 and over	425.94	259.16	160.57	226.32	273.45	305.70	372.67	393.43	493.68	934.83
Girls, 2 to 15	91.39	49.30	24.64	35.99	68.38	65.81	82.86	100.32	110.83	195.84
Children under 2	71.28	53.16	36.22	46.73	56.72	56.34	71.35	77.97	88.15	115.23
Footwear	145.98	82.78	66.53	78.58	111.15	109.65	143.04	151.62	181.02	272.26
Other apparel products and service	275.35	143.95	120.16	125.48	154.43	185.08	251.84	263.20	299.32	640.40
Transportation	6,730.02	2,850.62	2,017.06	3,512.74	4,169.68	5,290.70	6,136.57	7,454.60	9,770.64	12,735.61
Vehicle purchases (net outlay)	3,043.03	1,193.17	829.27	1,724.11	1,875.89	2,410.54	2,587.62	3,274.35	4,663.93	5,731.73
Cars and trucks, new	1,382.57	421.06	208.17	691.87	647.92	690.96	953.09	1,194.63	2,149.54	3,549.61
New cars	843.73	421.06	161.94	424.23	583.82	419.28	425.46	712.72	1,122.26	2,271.29
New trucks	538.85	0.00	46.23	267.64	64.10	271.68	527.63	481.90	1,027.28	1,278.32
Cars and trucks, used	1,606.84	772.11	616.77	1,013.78	1,179.36	1,670.59	1,609.89	2,005.10	2,377.61	2,113.37
Used cars	956.25	349.79	403.02	574.13	798.04	1,061.72	892.92	1,138.52	1,118.35	1,489.63
Used trucks	650.59	422.32	213.75	439.64	381.32	608.87	716.98	866.58	1,259.26	623.73
Other vehicles	53.61	0.00	4.34	18.46	48.61	48.99	24.63	74.63	136.78	68.76
Gasoline and motor oil	1,030.17	559.95	423.71	602.28	737.56	892.79	1,055.57	1,237.65	1,399.02	1,624.61
Other vehicle expenses	2,231.73	893.92	604.15	996.75	1,328.92	1,701.78	2,173.98	2,560.12	3,257.01	4,290.58
Vehicle finance charges	328.61	126.98	47.55	96.75	155.46	225.42	372.23	417.37	580.65	590.52
Maintenance and repairs	631.94	302.70	235.31	341.34	399.16	533.92	638.71	730.68	876.06	1,086.98
Vehicle insurance	765.97	350.12	222.48	413.01	547.90	642.15	780.92	915.35	1,052.64	1,316.76

CE Interview Survey Microdata: Average Annual Expenditures for Calendar Year 1998 by Income

TITLE	Total Complete Reporting	Less Than $5,000	$5,000 To $9,999	$10,000 To $14,999	$15,000 To $19,999	$20,000 To $29,999	$30,000 To $39,999	$40,000 To $49,999	$50,000 To $69,999	$70,000 And Over
Vehicle rental, leases, license	505.22	114.12	98.81	145.64	226.40	300.28	382.12	496.72	747.65	1,296.32
Public transportation	425.09	203.59	159.93	189.60	227.31	285.60	319.40	382.47	450.69	1,088.68
Health care	1,814.40	785.19	1,106.54	1,544.18	2,003.69	1,726.33	1,716.61	1,850.74	1,981.49	2,587.94
Health insurance	926.43	392.01	580.62	787.73	981.99	959.32	936.64	965.02	978.67	1,240.21
Medical services	565.18	233.84	265.83	377.86	533.82	444.84	482.41	600.10	743.11	969.90
Prescription drugs	240.11	125.57	219.51	323.47	386.44	251.85	227.93	190.38	173.16	239.15
Medical supplies	82.68	33.77	40.58	55.13	101.43	70.32	69.63	95.24	86.56	138.68
Entertainment	1,757.00	830.89	536.56	840.19	890.55	1,186.27	1,427.79	1,730.39	2,483.91	3,908.91
Fees and admissions	510.35	236.42	114.48	163.47	213.59	273.20	365.71	464.90	685.78	1,379.23
Television, radios, sound equipmen	604.00	331.01	278.34	364.32	425.04	509.50	586.27	643.41	774.92	1,047.83
Pets, toys, and playground equipme	281.89	109.25	89.33	121.58	147.33	207.45	267.66	277.05	424.29	575.10
Other entertainment supplies, equi	360.77	154.22	54.41	190.82	104.60	196.11	208.15	345.03	598.92	906.75
Personal care products and services	295.01	134.29	134.52	176.85	228.03	246.11	273.69	311.44	357.85	540.29
Reading	169.78	89.87	63.69	94.45	103.82	131.96	153.91	167.91	219.21	340.35
Education	538.99	644.06	339.91	181.93	278.24	346.83	363.06	424.18	622.77	1,261.39
Tobacco products and smoking supplies	276.71	219.84	207.46	232.15	258.91	281.87	312.82	324.92	330.93	269.81
Miscellaneous	825.01	433.04	360.82	516.64	503.67	705.33	823.85	968.19	1,059.83	1,402.49
Cash contributions	1,238.08	204.15	263.08	606.33	545.30	864.62	1,078.01	1,346.58	1,640.69	2,910.73
Personal insurance and pensions	4,119.23	523.38	322.35	598.42	996.65	1,833.05	3,155.02	4,741.77	6,423.60	11,645.20
Life and other personal insurance	407.25	211.87	105.38	160.98	221.62	269.04	302.23	513.51	515.60	936.43
Pensions and social security	3,711.98	311.51	216.97	437.44	775.03	1,564.01	2,852.79	4,228.26	5,908.01	10,708.77
Money income before taxes	41,600.06	2,252.09	7,726.48	12,374.16	17,440.88	24,587.75	34,487.03	44,320.01	58,665.83	107941.49
Wages and salaries	32,887.30	1,594.31	1,982.86	4,752.53	8,399.45	16,166.38	26,206.11	36,622.58	50,534.80	93,049.71
Self-employment income	2,208.97	-805.79	138.00	205.12	538.76	662.93	1,385.57	2,094.77	2,761.18	7,946.59
Social Security, private and governme	4,622.16	634.76	4,011.86	6,087.33	6,966.22	6,320.77	5,224.70	4,017.48	3,632.83	3,253.85
Interest, dividends, rental income, o	866.35	35.22	71.59	186.87	312.74	514.99	708.84	839.87	919.39	2,660.78
Unemployment and workers' compensatio	192.93	54.91	81.97	86.66	244.78	197.66	270.78	230.50	229.00	225.86
Public assistance, supplemental secur	330.49	415.47	1,078.35	646.73	492.17	261.84	169.16	183.62	115.36	30.07
Regular contributions for support ..	258.82	147.61	156.26	208.17	267.09	283.27	310.07	221.86	311.11	296.96
Other income	233.03	175.59	205.60	200.74	219.68	179.92	211.82	109.34	162.16	477.66
Personal taxes	3,286.53	125.55	98.27	252.90	546.39	1,064.64	2,062.85	3,356.21	4,832.79	10,873.60
Federal income taxes	2,492.07	75.14	22.28	115.01	301.99	707.35	1,485.54	2,488.98	3,706.16	8,527.11
State and local income taxes	632.02	3.75	12.86	54.20	123.63	236.39	446.17	720.17	939.64	1,975.80
Other taxes	162.43	46.66	63.13	83.70	120.77	120.90	131.13	147.07	187.00	370.69

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. T his 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 1998 and 1999 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 1998 and 1999 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 7,000 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 5,000. Information on 1998 interview participation follows.

The response rate for the 1998 Interview Survey is 79.9% as shown below

Consumer units designated for the survey	Type B or C ineligible cases	*Eligible housing unit interviews* Number of potential interviews	Type A nonresponse	Total respondent interviews
33,906	6,138	27,768	5,591	22,177

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

<u>Population</u>

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, $^{N(D)971}$(UCC) identifies a new (deleted) UCC beginning in Q971.

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 (1998)
*L 006004	Total amount owed to creditors, 5th interview, asked first quarter, current year (1998)
006005	Total amount owed to creditors, 2nd interview, asked first quarter, current year + 1 (1999)
006006	Total amount owed to creditors, 5th interview, asked first quarter, current year +1 (1999)
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, includes parking fees
210210	Lodging away from home on trips
210310	Housing for someone at school
210901	Ground rent - owned home
210902	Ground rent - owned vacation home
220111	Fire and extended coverage insurance - owned home
220112	Fire and extended coverage insurance - owned vacation home
220121	Homeowners insurance - owned home; 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
220511	Non-installed wall-to-wall carpeting (original), homeowner
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
220614 Installed wall to wall carpeting (original), homeowner
220615 Same as 220611 - owned vacation home; vacation condos and coops
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
230131 Installed wall to wall carpeting - renter
230132 Installed wall to wall carpeting (replacement) homeowner
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 Telephone services, excluding mobile car phones
270102 Telephone service for mobile car phones
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 Community antenna or cable TV; portion of management fees for utilities in condos and coops
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
310312 Phonograph or record player
310313 Tape recorder and player
310320 Sound components, component systems, and compact disc sound systems
310330 Other sound and video equipment, incl. accessories
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
320110 Room-size rugs and other non-permanent floor coverings
320120 Venetian blinds, window shades and other window coverings
320130 Infants' equipment
320150 Outdoor equipment
320161 Non-installed wall to wall carpeting and carpet squares - renter
320162 Non-installed wall to wall carpeting (replacement) and carpet squares - homeowner
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
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
520110 State and 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
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
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
630110 Cigarettes
630210 Cigars, pipe tobacco, and other tobacco products
640130 Wigs, hairpieces, or toupees
640420 Electric personal care appliances
650110 Personal care services for females, including haircuts
650210 Personal care services for males, 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, 220121, 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
790820 Principal amount of trust holding for new purchaser - 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 monthly (Section 19 of questionnaire)
800121 Child support monthly (Section 19 of questionnaire)
800700 Meals received as pay
800710 Rent received as pay
800721 Market value of owned home
800803 Money given to non-CU members, charities, and other organizations
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
820201 Principal amount of trust holding for new purchaser - owned home
820202 Principal amount of trust holding for new purchaser - 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
910050 Rental equivalence of owned home
910060 Estimated monthly rental value of time share - owned vacation home or recreational property
910070 Estimated monthly rental value of owned vacation home or recreational property, not time share
910080 Rent received for time share - owned vacation home or recreational property
910090 Rent received for owned vacation home or recreational property, not time share
990900 Rental and installation of dishwasher, disposal, and range hood
990910 Cost of supplies purchased by consumer unit for termite or pest control for jobs considered addition, alteration or new construction - renter
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
800112 Alimony annual (Section 22 of questionnaire)

800122 Child support annual (Section 22 of questionnaire)
800801 Cash contributions for support to persons not in the CU
800802 Cash contributions to college students
800810 Gifts in the form of cash, bonds, or stocks to persons not in the CU
800820 Contributions to charities, such as United Way and red cross
800830 Contributions to churches or other religious organizations
800840 Contributions to educational organizations
800850 Contributions to political organizations
800860 Contributions to other organizations
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
900001 Occupational expenses such as union dues, tools, uniforms, business or professional association dues, licenses or permits
*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
*L 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 following shows the UCC aggregation used in the sample program. This information is provided on the AGGregation and LABel files (Section III.F.6. PROCESSING FILES). 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.

TOTAL EXPENDITURES
002120, 190901-220322, 220901-450110, 450210, 450220, 450310, 450313-450410, 450413-450414, 460110, 460901-460902, 470111-600122, 600132, 600141, 600142, 600210-710110, 790220-790600, 790690, 800700-800710, 800801, 800810-800920
FOOD
190901-190904, 790220-790230, 790410, 790430, 800700
Food at home
190904, 790220-790230
Food away from home
190901-190903, 790410, 790430, 800700
ALCOHOLIC BEVERAGES
200900, 790310-790320, 790420
HOUSING
210110-220322, 220901-270214, 270411-300412, 320110-340530, 340620-340901, 340903-340904, 340906-350110, 430130, 670310, 690111-690245, 790690, 800710, 880110, 880310, 990920-990940
SHELTER
210110-220322, 220901-230115, 230121-230123, 230141-240323, 320611-320633,

340911-340913, 340915-350110, 790690, 800710, 880110, 880310, 990910-990940
OWNED DWELLINGS
210901, 220111, 220121, 220211, 220311, 220313, 220321, 220901, 230112-230115, 230122, 230142, 230151, 230901, 240112, 240122, 240212-240213, 240222, 240312, 240322, 320612, 320622, 320632, 340911, 880110, 990930
Mortgage interest
220311, 220313, 220321, 880110
Property taxes
220211
Maintenance, repairs, insurance, and other expenses
210901, 220111, 220121, 220901, 230112-230115, 230122, 230142, 230151 230901, 240112, 240122, 240212-240213, 240222, 240312, 240322, 320612, 320622, 320632, 340911, 990930
RENTED DWELLINGS
210110, 230121, 230141, 230150, 240111, 240121, 240211, 240221, 240311, 240321, 320611, 320621, 320631, 350110, 790690, 800710, 990910-990920
OTHER LODGING
210210, 210310, 210902, 220112, 220122, 220212, 220312, 220314, 220322, 220902, 230123, 230152, 230902, 240113, 240123, 240214, 240223, 240313, 240323, 320613, 320623, 320633, 340912, 880310, 990940
UTILITIES, FUELS AND PUBLIC SERVICES
250111-270214, 270411-270904
Natural gas
260211-260214
Electricity
260111-260114
Fuel oil and other fuels
250111-250904
Telephone
270101, 270102
Water and other public services
270211-270214, 270411-270904
HOUSEHOLD OPERATIONS
330511, 340211-340530, 340620-340901, 340903, 340906-340908, 340914, 670310, 690113-690114
Personal services
340211, 340212, 340906, 340910, 670310
Other household expenses
330511, 340310, 340410-340420, 340510-340530, 340620-340630, 340901, 340903, 340907-340908, 340914, 690113-690114
HOUSEFURNISHINGS AND EQUIPMENT
230117-230118, 230131-230132, 280110-300412, 320110-320522, 320901-320904, 340904, 430130, 690111-690112, 690210-690245
Household textiles
280110-280900
Furniture
290110-290440
Floor coverings
230131-230132, 320110, 320161-320162
Major appliances
230117-230118, 300111-300412, 320511-320512
Small appliances, misc. housewares
320310-320370, 320521-320522,
Miscellaneous household equipment
320120-320150, 320210-320232, 320410-320420, 320901-320904, 340904, 430130, 690111-690112, 690210-690245

APPAREL AND SERVICES
360110-430120, 440110-440900
Men and boys
360110-370904
Men, 16 and over
360110-360902
Boys, 2 to 15
370110-370904
Women and girls
380110-390902
Women, 16 and over
380110-380903
Girls, 2 to 15
390110-390902
Children under 2
410110-410901
Footwear
400110-400310
Other apparel products and services
420110-430120, 440110-440900
TRANSPORTATION
450110, 450210, 450220, 450310, 450313-450314, 450410, 450413-450414, 460110, 460901-460902, 470111-520550, 520902-520903, 520905-520906, 530110-530902, 620113, 850300
Cars and trucks, new (net outlay)
450110, 450210
Cars and trucks, used (net outlay)
460110, 460901
Other vehicles
450220, 460902
Vehicle finance charges
510110-510902, 850300
Gasoline and motor oil
470111-470212
Maintenance and repairs
470220-490900
Vehicle insurance
500110
Public transportation
530110-530902
Vehicle rental, licenses, and other charges
450310, 450313-450314, 450410, 450413-450414, 520110-520550, 520902-520903, 520905-520906, 620113
HEALTH CARE
540000-580902
Health insurance
580110-580902
Medical services
560110-570240
Prescription drugs and medical supplies
540000-550340, 570901, 570903
ENTERTAINMENT
270310, 310110-310342, 340610, 340902, 340905, 520901, 520904, 520907, 600110-600122, 600132, 600141, 600142, 600210-620111 620121-620922
Fees and admissions
610900-620111, 620121-620310, 620903
Televisions, radios, and sound equipment

270310, 310110-310342, 340610, 340902, 340905, 610130, 620904, 620912

Other equipment and services

520901, 520904, 520907, 600110-600122, 600132, 600141, 600142, 600210-610120, 610210-610320, 620330-620420, 620905-620909, 620919-620922

PERSONAL CARE

640130-650900

READING

590111-590230, 660310

EDUCATION

660110-660210, 660900-670210, 670901-670902

TOBACCO AND SMOKING SUPPLIES

630110-630210

MISCELLANEOUS

620112, 680110-680902, 710110, 790600, 880210, 900001

CASH CONTRIBUTIONS

800801, 800810-800860

PERSONAL INSURANCE AND PENSIONS

002120, 700110, 800910-800940

LIFE AND OTHER PERSONAL INSURANCE

002120, 700110

RETIREMENT, PENSIONS, SOCIAL SECURITY

800910-800940

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	CKBKACTX	85	COMPSECX	198
DIRACC	9	CKBK_CTX	95	COMP_ECX	206
DIRACC_	10	CLLGEQTR	96	CSHCNTBX	207
AGE_REF	11	CLLG_QTR	97	CSHC_TBX	215
AGE_REF_	13	CNTEDORX	98	CUTENURE	216
AGE2	14	CNTE_ORX	106	CUTE_URE	217
AGE2_	16	CNTRCHRX	107	DONTKNOW	218
ALIMOX	17	CNTR_HRX	115	DONT_NOW	220
ALIMOX_	25	CNTRELGX	116	EARNCOMP	221
AS_COMP1	26	CNTR_LGX	124	EARN_OMP	222
AS_C_MP1	28	CNTRPOLX	125	EARNINCX	223
AS_COMP2	29	CNTR_OLX	133	EARN_NCX	232
AS_C_MP2	31	COLLEXPX	134	EDUC_REF	233
AS_COMP3	32	COLL_XPX	142	EDUC0REF	235
AS_C_MP3	34	COMPBND	143	EDUCA2	236
AS_COMP4	35	COMPBND_	144	EDUCA2_	238
AS_C_MP4	37	COMPBNDX	145	ELECCOOK	239
AS_COMP5	38	COMP_NDX	153	ELEC_OOK	241
AS_C_MP5	40	COMPCKG	154	FAM_SIZE	242
BATHRMQ	41	COMPCKG_	155	FAM__IZE	244
BATHRMQ_	44	COMPCKGX	156	FAM_TYPE	245
BEDROOMQ	45	COMP_KGX	164	FAM__YPE	246
BEDR_OMQ	48	COMPENSX	165	FAMTFEDX	247
BLS_URBN	49	COMP_NSX	173	FAMT_EDX	255
BSINVSTX	50	COMPOWD	174	FEDRFNDX	256
BSIN_STX	60	COMPOWD_	175	FEDR_NDX	264
BUILDING	61	COMPOWDX	176	FEDTAXX	265
BUIL_ING	63	COMP_WDX	184	FEDTAXX_	273
BUILT	64	COMPSAV	185	FFRMINCX	274
BUILT_	66	COMPSAV_	186	FFRM_NCX	283
CBSGFTX	67	COMPSAVX	187	FGOVRETX	284
CBSGFTX_	75	COMP_AVX	195	FGOV_ETX	292
CHLDSUPX	76	COMPSEC	196	FINCATAX	293
CHLD_UPX	84	COMPSEC_	197	FINCAT_X	302

Variable	Start Position	Variable	Start Position	Variable	Start Position
FINCBTAX	303	INCOMEY2	480	OTHR_NCX	623
FINCBT_X	312	INCO_EY2	481	PENSIONX	624
FINDRETX	313	INCWEEK1	482	PENS_ONX	632
FIND_ETX	321	INCW_EK1	484	PERSLT18	633
FININCX	322	INCWEEK2	485	PERS_T18	635
FININCX_	330	INCW_EK2	487	PERSOT64	636
FINLWT21	331	INSRFNDX	488	PERS_T64	638
FJSSDEDX	342	INSR_NDX	496	POPSIZE	639
FJSS_EDX	350	INTEARNX	497	PRINEARN	640
FNONFRMX	351	INTE_RNX	505	PRIN_ARN	642
FNON_RMX	360	JFDSTMPA	506	PTAXRFDX	643
FPRIPENX	361	JFDS_MPA	514	PTAX_FDX	651
FPRI_ENX	369	MISCTAXX	515	PUBLHOUS	652
FRRDEDX	370	MISC_AXX	523	PUBL_OUS	653
FRRDEDX_	378	LOT_SIZE	524	PURSSECX	654
FRRETIRX	379	LOT__IZE	526	PURS_ECX	662
FRRE_IRX	387	LUMPSUMX	527	QINTRVMO	663
FSALARYX	388	LUMP_UMX	535	QINTRVYR	665
FSAL_RYX	396	MARITAL1	536	RACE2	669
FSLTAXX	397	MARI_AL1	537	RACE2_	670
FSLTAXX_	405	MISCNTRX	538	REF_RACE	671
FSSIX	406	MISC_TRX	546	REF__ACE	672
FSSIX_	414	MONYOWDX	547	REGION	673
FUEL_OIL	415	MONY_WDX	555	RENTEQVX	674
FUEL0OIL	417	NO_EARNR	556	RENT_QVX	680
GAS	418	NO_E_RNR	558	RESPSTAT	681
GAS_	420	NO_EARNX	559	RESP_TAT	682
GOVTCOST	421	NO_E_RNX	568	ROOMSQ	683
GOVT_OST	422	NO_FUEL	569	ROOMSQ_	686
HLFBATHQ	423	NO_FUEL_	571	SALEINCX	687
HLFB_THQ	426	NONINCMX	572	SALE_NCX	695
INC_HRS1	427	NONI_CMX	580	SAVACCTX	696
INC__RS1	430	NUM_AUTO	581	SAVA_CTX	706
INC_HRS2	431	NUM__UTO	583	SECESTX	707
INC__RS2	434	OCCEXPNX	584	SECESTX_	717
INC_RANK	435	OCCE_PNX	592	SELLSECX	718
INC__ANK	445	OCCUCOD1	593	SELL_ECX	728
INC_RNKU	446	OCCU_OD1	595	SETLINSX	729
INC__NKU	455	OCCUCOD2	596	SETL_NSX	737
INCLOSSA	456	OCCU_OD2	598	SEX_REF	738
INCL_SSA	464	ORIGIN1	599	SEX_REF_	739
INCLOSSB	465	ORIGIN1_	600	SEX2	740
INCL_SSB	473	ORIGIN2	601	SEX2_	741
INCNONW1	474	ORIGIN2_	602	SLOCTAXX	742
INCN_NW1	475	OTH_COOK	603	SLOC_AXX	750
INCNONW2	476	OTH__OOK	605	SLRFUNDX	751
INCN_NW2	477	OTHRFNDX	606	SLRF_NDX	759
INCOMEY1	478	OTHR_NDX	614	SMSASTAT	760
INCO_EY1	479	OTHRINCX	615	SSOVERPX	761

Variable	Start Position	Variable	Start Position	Variable	Start Position
SSOV_RPX	769	WTREP31	1171	CUTILSPS	1745
ST_HOUS	770	WTREP32	1182	PNATLGAS	1757
ST_HOUS_	771	WTREP33	1193	CNATLGAS	1769
TAXPROPX	772	WTREP34	1204	PELECTRC	1781
TAXP_OPX	780	WTREP35	1215	CELECTRC	1793
TOTTXPDX	781	WTREP36	1226	PALLFUEL	1805
TOTT_PDX	790	WTREP37	1237	CALLFUEL	1817
UNEMPLX	791	WTREP38	1248	PFUELOIL	1829
UNEMPLX_	799	WTREP39	1259	CFUELOIL	1841
USBNDX	800	WTREP40	1270	POTHRFLS	1853
USBNDX_	808	WTREP41	1281	COTHRFLS	1865
VEHQ	809	WTREP42	1292	PTELEPHE	1877
VEHQ_	811	WTREP43	1303	CTELEPHE	1889
WDBSASTX	812	WTREP44	1314	PWATERPS	1901
WDBS_STX	822	PTOTAL	1325	CWATERPS	1913
WDBSGDSX	823	CTOTAL	1337	PHOUSEOP	1925
WDBS_DSX	831	PFOODTOT	1349	CHOUSEOP	1937
WELFAREX	832	CFOODTOT	1361	PDOMSERV	1949
WELF_REX	840	PFOODHOM	1373	CDOMSERV	1961
WTREP01	841	CFOODHOM	1385	PDMSRXCC	1973
WTREP02	852	PFOODAWY	1397	CDMSRXCC	1985
WTREP03	863	CFOODAWY	1409	PBABYDAY	1997
WTREP04	874	PFOODXMP	1421	CBABYDAY	2009
WTREP05	885	CFOODXMP	1433	POTHRHEX	2021
WTREP06	896	PFOODMAP	1445	COTHRHEX	2033
WTREP07	907	CFOODMAP	1457	PHOUSEFE	2045
WTREP08	918	PALCBEVS	1469	CHOUSEFE	2057
WTREP09	929	CALCBEVS	1481	PTEXTILE	2069
WTREP10	940	PHOUSING	1493	CTEXTILE	2081
WTREP11	951	CHOUSING	1505	PFURNTRE	2093
WTREP12	962	PSHELTER	1517	CFURNTRE	2105
WTREP13	973	CSHELTER	1529	PFLOORCV	2117
WTREP14	984	POWNDWLL	1541	CFLOORCV	2129
WTREP15	995	COWNDWLL	1553	PMAJAPPL	2141
WTREP16	1006	PMORTINT	1565	CMAJAPPL	2153
WTREP17	1017	CMORTINT	1577	PSMLAPPL	2165
WTREP18	1028	PPROPTAX	1589	CSMLAPPL	2177
WTREP19	1039	CPROPTAX	1601	PMISCHEQ	2189
WTREP20	1050	PMREPINS	1613	CMISCHEQ	2201
WTREP21	1061	CMREPINS	1625	PAPPAREL	2213
WTREP22	1072	PRENTDWL	1637	CAPPAREL	2225
WTREP23	1083	CRENTDWL	1649	PMENABOY	2237
WTREP24	1094	PRENTXRP	1661	CMENABOY	2249
WTREP25	1105	CRENTXRP	1673	PMENOSIX	2261
WTREP26	1116	PRENTRAP	1685	CMENOSIX	2273
WTREP27	1127	CRENTRAP	1697	PBOYLFIF	2285
WTREP28	1138	POTHRLOD	1709	CBOYLFIF	2297
WTREP29	1149	COTHRLOD	1721	PWOMAGRL	2309
WTREP30	1160	PUTILSPS	1733	CWOMAGRL	2321

Variable	Start Position	Variable	Start Position	Variable	Start Position
PWOMOSIX	2333	CTVRADIO	2921	SWIMPOOL	3298
CWOMOSIX	2345	POTHREQP	2933	SWIM_OOL	3300
PGIRLFIF	2357	COTHREQP	2945	TENNISCT	3301
CGIRLFIF	2369	PPETSTOY	2957	TENN_SCT	3303
PCHILDRN	2381	CPETSTOY	2969	TERRACE	3304
CCHILDRN	2393	POTHENTR	2981	TERRACE_	3306
PFOOTWAR	2405	COTHENTR	2993	WATERHT	3307
CFOOTWAR	2417	PPERCARE	3005	WATERHT_	3309
POTHRAPL	2429	CPERCARE	3017	APTMENT	3310
COTHRAPL	2441	PREADING	3029	APTMENT_	3312
PTRANPRT	2453	CREADING	3041	OFSTPARK	3313
CTRANPRT	2465	PEDUCATN	3053	OFST_ARK	3315
PCARTRKN	2477	CEDUCATN	3065	WINDOWAC	3316
CCARTRKN	2489	PTOBACCO	3077	WIND_WAC	3318
PCARTRKU	2501	CTOBACCO	3089	CNTRALAC	3319
CCARTRKU	2513	PMISCELS	3101	CNTR_LAC	3321
POTHRVEH	2525	CMISCELS	3113	CHILDAGE	3322
COTHRVEH	2537	PMISCEL1	3125	CHIL_AGE	3323
PGASMOTO	2549	CMISCEL1	3137	INCLASS	3324
CGASMOTO	2561	PMISCEL2	3149	STATE	3326
PVEHFINC	2573	CMISCEL2	3161	STATE_	3328
CVEHFINC	2585	PCASHCTB	3173	CHDOTHX	3329
PMAINREP	2597	CCASHCTB	3185	CHDOTHX_	3337
CMAINREP	2609	PPERLINS	3197	ALIOTHX	3338
PVEHCINS	2621	CPERLINS	3209	ALIOTHX_	3346
CVEHCINS	2633	PLIFOTHR	3221	CHDLMPX	3347
PVRENTLO	2645	CLIFOTHR	3233	CHDLMPX_	3355
CVRENTLO	2657	PRETIRES	3245	ERANKMTH	3356
PPUBTRAN	2669	CRETIRES	3257	ERAN_MTH	3367
CPUBTRAN	2681	HH_CU_Q	3269	ERANKH	3368
PTRNTRIP	2693	HH_CU_Q_	3271	ERANKH_	3377
CTRNTRIP	2705	HHID	3272	ERANKUH	3378
PTRNOTHR	2717	HHID_	3275	ERANKUH_	3386
CTRNOTHR	2729	POV_CY	3276	TOTEX4PQ	3387
PHEALTH	2741	POV_CY_	3277	TOTEX4CQ	3399
CHEALTH	2753	POV_PY	3278	MISCX4PQ	3411
PHLTHINS	2765	POV_PY_	3279	MISCX4CQ	3423
CHLTHINS	2777	BARN	3280	CUINCOME	3435
PMEDSERV	2789	BARN_	3282	CUIN_OME	3437
CMEDSERV	2801	ENCPORCH	3283	RECORDS	3438
PPREDRUG	2813	ENCP_RCH	3285	RECORDS_	3439
CPREDRUG	2825	GREENHSE	3286	TYPEREC1	3440
PMEDSUPP	2837	GREE_HSE	3288	TYPE_EC1	3441
CMEDSUPP	2849	GUESTHSE	3289	TYPEREC2	3442
PENTRMNT	2861	GUES_HSE	3291	TYPE_EC2	3443
CENTRMNT	2873	HEATFUEL	3292	TYPEREC3	3444
PFEESADM	2885	HEAT_UEL	3294	TYPE_EC3	3445
CFEESADM	2897	PATIO	3295	TYPEREC4	3446
PTVRADIO	2909	PATIO_	3297	TYPE_EC4	3447

Variable	Start Position	Variable	Start Position	Variable	Start Position
TYPEREC5	3448	TYPE_EC7	3453	NUM_TVAN	3459
TYPE_EC5	3449	TYPEREC8	3454	NUM__VAN	3461
TYPEREC6	3450	TYPE_EC8	3455		
TYPE_EC6	3451	VEHQL	3456		
TYPEREC7	3452	VEHQL_	3458		

B. MEMB FILE

Variable	Start Position	Variable	Start Position	Variable	Start Position
NEWID	1	INCOMEY_	123	SLTAXX_	238
AGE	9	INCORP	124	SOCRRX	239
AGE_	11	INCORP_	125	SOCRRX_	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		
ANPR_PNX	47	MARITAL_	148		
ANRRDEDX	48	MEDICOV	149		
ANRR_EDX	56	MEDICOV_	150		
ANSLTX	57	MEMBNO	151		
ANSLTX_	65	NFRMLOSS	153		
ARM_FORC	66	NFRM_OSS	154		
ARM__ORC	67	NONFARMX	155		
CU_CODE	68	NONF_RMX	165		
CU_CODE_	69	OCCUCODE	166		
EARNER	70	OCCU_ODE	168		
EARNER_	71	ORIGINR	169		
EARNTYPE	72	PAYPERD	170		
EARN_YPE	73	PAYPERD_	171		
EDUCA	74	PRIVPENX	172		
EDUCA_	76	PRIV_ENX	180		
EMPLCONT	77	PWRKSTAT	181		
EMPL_ONT	78	PWRK_TAT	182		
FARMINCX	79	RACE	183		
FARM_NCX	89	RACE_	184		
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 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 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.
Consumer Expenditures in 1997, Report 927 (1999)	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 1996, Report 926 (1998)	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, 1996-97, Report 935 (1999)	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 Expenditure Survey, 1994-95, Bulletin 2492 (1997)	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 Expenditure Survey, 1992-93, Bulletin 2462 (1995)	Consumer unit income and expenditures, integrated data from Diary and Interview Surveys, classified by consumer unit characteristics: one way and cross tabulations, relative and aggregate shares. 60 tables, 245 pages. Available at the Government Printing Office, stock number 029-001-03214-5, $15.00.
Consumer Expenditure Survey, 1990-91, Bulletin 2425 (1993)	Consumer unit income and expenditures, integrated data from Diary and Interview Surveys, classified by consumer unit characteristics: one way and cross tabulations, relative and aggregate shares. 60 tables, 256 pages. NTIS Accession No. PB95-190948, $36.50 for paper copy, $17.50 for microfiche.
Consumer Expenditure Survey, 1988-89, Bulletin 2383 (1991)	Consumer unit income and expenditures, integrated data from Interview and Diary Surveys, classified by consumer unit characteristics: one way and cross tabulations. 40 tables, 199 pages. NTIS Accession #PB92130061, $36.00 for paper copy, $17.50 for microfiche.

Consumer Expenditure Survey, 1987, Bulletin 2354 (1990)	Consumer unit income and expenditures, integrated data from Interview and Diary Surveys, classified by consumer unit characteristics; one way and cross tabulations. 29 tables, 153 pages. NTIS Accession #PB92131622, $27.00 for paper copy, $12.50 for microfiche.
Consumer Expenditure Survey: Integrated Survey Data, 1984-86, Bulletin 2333 (1989)	Consumer unit income and expenditures, integrated data from Interview and Diary Surveys, classified by consumer unit characteristics; one way and cross tabulation. 34 tables, 171 pages. NTIS Accession #PB92131515, $27.00 for paper copy, $12.50 for microfiche.
Consumer Expenditure Interview Survey: Quarterly Data, 1984-1987, Bulletin 2332 (1989)	Consumer unit income and expenditures from the Interview Survey presented by quarter, classified by consumer unit characteristics; region, size, age, quintiles, income before taxes, and tenure tables included. 100 tables, 113 pages. NTIS Accession #PB92131523, $27.00 for paper copy, $12.50 for microfiche.

CONSUMER EXPENDITURE SURVEY: QUARTERLY DATA FROM THE INTERVIEW SURVEY

These quarterly reports present selected expenditure data and include a brief analysis of trends in consumer spending or other topics related to the Consumer Expenditure Survey. Requests for these reports can be made at (202) 691-6900.

CONSUMER EXPENDITURE SURVEY DATA ON THE INTERNET

Commonly-requested CE data tables can be found on-line at http://stats.bls.gov/csxhome.htm. Tables of integrated Diary and Interview data from 1984 forward are available under the following headings: Standard tables, Cross-tabulated tables, and Metropolitan Statistical Area tables. Tables under the headings of Expenditure shares and Aggregate expenditure shares are available for 1998. Two-year tables of 1997-98 data can be found under the headings of Regions and High income. Under the Multiyear heading can be found a table containing annual data for the years 1984 through 1998.

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) 606-6325 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 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)

COMPACT DISKS

CE microdata on compact disk are available from the Bureau of Labor Statistics for 1972-73, 1980-81, 1990-91, 1992-93, 1994, 1995, 1996, 1997, and 1998. The 1980-81 through 1998 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 1994-98 include the complete collection of EXPN files. A 1984-94 “multi-year” CD that presents Interview FMLY file data is also available. In addition to the microdata, the CDs also contain the same integrated Diary and Interview tabulated data that are found on the CE data diskettes. (See DISKETTES below.)

DISKETTES

Diskettes containing integrated Diary and Interview survey data on consumer expenditures, income, and characteristics are available for the years 1984 through 1998. The diskettes are for use with IBM-compatible microcomputers with 3 1/2" disk drives. Users may specify either a Lotus 1-2-3 or an ASCII format.

The data on the diskettes are average annual expenditures by American consumers. They are presented in tables classified by 13 standard characteristics: quintiles of income, income class, age, size of consumer unit, composition of consumer unit, number of earners, housing tenure, race, type of area (urban-rural), origin, region, occupation, and education. Also on these diskettes are: data classified by income before taxes, cross-tabulated by age, by family size, or by region; data for selected Metropolitan Statistical Areas; and data for single persons classified by gender, cross-tabulated by age or by income. Expenditure categories in these tables are similar to those shown in the tables of the bulletin publications. For a more detailed description and an order form contact the BLS national office. (See Section XVII. INQUIRIES, SUGGESTIONS, AND COMMENTS)

STANDARD ERROR TABLES

Standard error tables for 1998 Interview and Diary data are available from the BLS national office upon request. These are cell specific and therefore extensive.

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.

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.