Medicare Current Beneficiary Survey

Section Specifications for R60 IAQ

INCOME AND ASSETS SUPPLEMENT

2011

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BOX IA1A

BOX INSTRUCTIONS

IF (SP IS IN THE EXIT SAMPLE AND PREVIOUS ROUND INTERVIEW WAS NOT SKIPPED), GO TO IAINT8 - SPSEINHH.

ELSE GO TO IAINTRO - IAINT.

OTHER PROGRAMMING INSTRUCTIONS

BACKGROUND VARIABLE ASSIGNMENTS

Before beginning IA questions, create a current round INCO record to collect IA data:

Key = INCO.INCOBASE + INCO.INCORND

Variable Name	Assignment Instructions
INCORND	Set INCO.INCORND = current round.

IAINT8 Code 1

QUESTION TEXT

WAS SP'S SPOUSE LIVING IN THE HOUSEHOLD DURING THIS ROUND?

FIELD 1: SPSEINHH

FIELD 1 ROUTING

Value	Label	Route
1	YES	IAINT9 - ADLTINHH
2	NO	IAINT9 - ADLTINHH
	Don't Know	IAINT9 - ADLTINHH

FIELD 1 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.SPSEINHH	1

IAINT9　　　　　Code 1

QUESTION TEXT

BESIDES SP (AND SP'S SPOUSE), WAS ANY OTHER ADULT, AGE 15 OR OLDER, LIVING IN THE HOUSEHOLD DURING THIS ROUND?

FIELD 1: ADLTINHH

FIELD 1 ROUTING

Value	Label	Route
1	YES	IAINTRO - IAINT
2	NO	IAINTRO - IAINT
	Don't Know	IAINTRO - IAINT

FIELD 1 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.ADLTINHH	1

IAINTRO   No Entry

QUESTION TEXT

Now I have some questions about (PREVIOUS YEAR) income and other financial resources for [you/(SP)/you and your (wife/husband)/(SP) and (his/her) (wife/husband)].

As with all information collected by the MCBS, the data are confidential and covered by the Privacy Act of 1974. Your answers will be combined with those of other respondents, and (your/his/her) Medicare benefits will not be affected in any way by your answers to these questions.

GIVE BROCHURE TO RESPONDENT. ALLOW A FEW MINUTES FOR RESPONDENT TO REVIEW BROCHURE IF NECESSARY.

FIELD 1: IAINT

FIELD 1 ROUTING

Value	Label	Route
1	CONTINUE	IAINTRO1 - IAINT1
	Empty	IAINTRO1 - IAINT1

FIELD 1 ATTRIBUTES

Cheshire Name	Answers Allowed
TEMP	1

IAINTRO1   No Entry

QUESTION TEXT

As the brochure explains, your responses to these questions can help us determine the impact of income on (your/his/her) use and access to health care. I will be asking a series of questions about [your/(SP's)/you and your (wife's/husband's)/(SP) and (his/her) (wife's/husband's)] income and other financial resources. First, I will ask whether [you/(SP)/you and your (wife/husband)/(SP) and (his/her) (wife/husband)] had particular types of income or other resources. All these questions can be answered with a "yes" or a "no." Then, I will ask you to estimate [your/(SP's)/their] total income. [Please answer all questions for [you and your (wife/husband)/(SP) and (his/her) (wife/husband)].

Please feel free to refer to any records or other persons who may be of assistance to you.

FIELD 1: IAINT1

FIELD 1 ROUTING

Value	Label	Route
1	CONTINUE	IA1A - SSRRPROB
	Empty	IA1A - SSRRPROB

FIELD 1 ATTRIBUTES

Cheshire Name	Answers Allowed
TEMP	1

IA1A   List

QUESTION TEXT

In (PREVIOUS YEAR), did [you/(SP)/you or your (wife/husband)/(SP) or (his/her) (wife/husband)]. . .

FIELD 1: SSRRPROB

receive Social Security and/or Railroad Retirement payments?

[READ IF NECESSARY: Social Security checks are either automatically deposited in the bank or mailed to arrive on the 3rd of the month. If mailed, they are often sent in colored envelopes, such as a gold or manila-colored envelope.]

FIELD 1 ROUTING

Value	Label	Route
1	YES	IA1A - SSIPROBE
2	NO	IA1A - SSIPROBE
	Don't Know	IA1A - SSIPROBE
	Refused	IA1A - SSIPROBE

FIELD 1 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.SSRRPROB	1

FIELD 2: SSIPROBE

receive Supplemental Security Income, which is also called SSI, or Social Security Disability Insurance, also called SSDI?

FIELD 2 ROUTING

Value	Label	Route
1	YES	IA1A - DISAPROB

Value	Label	Route
2	NO	IA1A - DISAPROB
	Don't Know	IA1A - DISAPROB
	Refused	IA1A - DISAPROB

FIELD 2 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.SSIPROBE	1

FIELD 3: DISAPROB

receive any disability payments (other than Social Security, SSDI, and/or Railroad Retirement)?

FIELD 3 ROUTING

Value	Label	Route
1	YES	IA1A - PENPROBE
2	NO	IA1A - PENPROBE
	Don't Know	IA1A - PENPROBE
	Refused	IA1A - PENPROBE

FIELD 3 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.DISAPROB	1

FIELD 4: PENPROBE

receive any retirement or survivor pension or annuity (other than Social Security or Railroad Retirement)?

FIELD 4 ROUTING

Value	Label	Route
1	YES	IA1B - JOBPROBE
2	NO	IA1B - JOBPROBE
	Don't Know	IA1B - JOBPROBE
	Refused	IA1B - JOBPROBE

FIELD 4 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.PENPROBE	1

IA1B

List

QUESTION TEXT

In (PREVIOUS YEAR), did [you/(SP)/you or your (wife/husband)/(SP) or (his/her) (wife/husband)] . . .

FIELD 1: JOBPROBE

work at a job or business for pay? That is, did [you/he/she/he or his wife/she or her husband/you or your (wife/husband)] receive income by working for an employer or by being self-employed, such as owning a business, professional practice, or farm?

FIELD 1 ROUTING

Value	Label	Route
1	YES	IA1B - WELPROBE
2	NO	IA1B - WELPROBE
	Don't Know	IA1B - WELPROBE
	Refused	IA1B - WELPROBE

FIELD 1 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.JOBPROBE	1

FIELD 2: WELPROBE

receive any income from public assistance or welfare from the state or local welfare office? Please include programs such as Temporary Aid to Needy Families or TANF and food stamps.

FIELD 2 ROUTING

Value	Label	Route
1	YES	IA1B - RELPROBE
2	NO	IA1B - RELPROBE

Value	Label	Route
	Don't Know	IA1B - RELPROBE
	Refused	IA1B - RELPROBE

FIELD 2 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.WELPROBE	1

FIELD 3: RELPROBE

receive financial assistance from relatives or friends?

FIELD 3 ROUTING

Value	Label	Route
1	YES	IA1B - IRAWD
2	NO	IA1B - IRAWD
	Don't Know	IA1B - IRAWD
	Refused	IA1B - IRAWD

FIELD 3 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.RELPROBE	1

FIELD 4: IRAWD

convert or withdraw any funds from an IRA, Keogh, 401K, or other retirement savings account in (PREVIOUS YEAR)?

FIELD 4 ROUTING

Value	Label	Route
1	YES	IA1C - STOKPROB
2	NO	IA1C - STOKPROB
	Don't Know	IA1C - STOKPROB
	Refused	IA1C - STOKPROB

FIELD 4 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.IRAWD	1

IA1C

List

QUESTION TEXT

In (PREVIOUS YEAR), did [you/(SP)/you or your (wife/husband)/(SP) or (his/her) (wife/husband)]. . .

FIELD 1: STOKPROB

receive any dividends from any investments in stocks or mutual funds or other investments?

FIELD 1 ROUTING

Value	Label	Route
1	YES	IA1C - LUMPPROB
2	NO	IA1C - LUMPPROB
	Don't Know	IA1C - LUMPPROB
	Refused	IA1C - LUMPPROB

FIELD 1 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.STOKPROB	1

FIELD 2: LUMPPROB

receive a lump sum or any one-time payments such as a life insurance or pension settlement, inheritance, or a capital gain from the sale of securities, property, or a business?

FIELD 2 ROUTING

Value	Label	Route
1	YES	IA1C - ESTPROBE
2	NO	IA1C - ESTPROBE
	Don't Know	IA1C - ESTPROBE

Value	Label	Route
	Refused	IA1C - ESTPROBE

FIELD 2 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.LUMPPROB	1

FIELD 3: ESTPROBE

receive any regular payments from estates, trusts, annuities (other than pensions), life insurance, or royalties?

FIELD 3 ROUTING

Value	Label	Route
1	YES	IA1C - PROPRENT
2	NO	IA1C - PROPRENT
	Don't Know	IA1C - PROPRENT
	Refused	IA1C - PROPRENT

FIELD 3 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.ESTPROBE	1

FIELD 4: PROPRENT

receive any income from the rental of properties?

FIELD 4 ROUTING

Value	Label	Route
1	YES	IA13 - OTHPROBE

Value	Label	Route
2	NO	IA13 - OTHPROBE
	Don't Know	IA13 - OTHPROBE
	Refused	IA13 - OTHPROBE

FIELD 4 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.PROPRENT	1

IA13

Code 1

QUESTION TEXT

Not including anything you've already told me about, did [you/(SP)/you or your (wife/husband)/(SP) or (his/her) (wife/husband)] receive income from any other sources, such as Department of Veterans Affairs payments, worker's or unemployment compensation, child support, or alimony?

FIELD 1: OTHPROBE

FIELD 1 ROUTING

Value	Label	Route
1	YES	BOX IA1
2	NO	BOX IA1
	Don't Know	BOX IA1
	Refused	BOX IA1

FIELD 1 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.OTHPROBE	1

BOX IA1

BOX INSTRUCTIONS

IF AT LEAST ONE INCOME PROBE AT IA1A, IA1B, IA1C, OR IA13 WAS ANSWERED "YES", GO TO IA14 - INCYRAMT.

ELSE GO TO BOX IA2AA.

IA14

Quantity Unit

QUESTION TEXT

SHOW CARD IA1

Taking all of these income sources into account, please estimate [your/(SP's)/you and your (wife's/husband's)/(SP) and (his/her) (wife's/husband's)] income for (PREVIOUS YEAR).

[PROBE: In estimating (your/his/her/their) total income you can respond for all of (PREVIOUS YEAR), or, if you prefer, provide a one month estimate.]

[PROBE: REVIEW THESE SOURCES WITH RESPONDENT: [Social Security or Railroad Retirement/
(SSI/SSDI)/disability/pensions/job, business, professional practice, farm/public assistance programs/assistance from relatives or friends/withdrawal from retirement or savings/dividends/lump sum payments/other regular payments/rental properties/other sources]]

FIELD 1: INCYRAMT

FIELD 1 ROUTING

Value	Label	Route
1	[Continuous answer.]	IA14 - INCYRUNT
	Don't Know	IA15 - INCYRMT1
	Refused	IA15 - INCYRMT1

FIELD 1 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.INCYRAMT	1

FIELD 2: INCYRUNT

FIELD 2 ROUTING

Value	Label	Route
1	TOTAL FOR (PREVIOUS YEAR)	BOX IA2AA
2	ONE MONTH	BOX IA2AA
	Don't Know	IA15 - INCYRMT1
	Refused	IA15 - INCYRMT1

FIELD 2 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.INCYRUNT	1

IA15 Code 1

QUESTION TEXT

Was it more than ($20,000/$1,700/$40,000/$3,300)?

FIELD 1: INCYRMT1

FIELD 1 ROUTING

Value	Label	Route
1	YES	BOX IA2AA
2	NO	IA16 - INCYRMT2
	Don't Know	BOX IA2AA
	Refused	BOX IA2AA

FIELD 1 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.INCYRMT1	1

IA16

Code 1

QUESTION TEXT

Was it more than ($12,000/$1,000/$25,000/$2,000)?

FIELD 1: INCYRMT2

FIELD 1 ROUTING

Value	Label	Route
1	YES	BOX IA2AA
2	NO	IA17 - INCYRMT3
	Don't Know	BOX IA2AA
	Refused	BOX IA2AA

FIELD 1 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.INCYRMT2	1

IA17 Code 1

QUESTION TEXT

Was it more than ($7,700/$640/$17,000/$1,400)?

FIELD 1: INCYRMT3

FIELD 1 ROUTING

Value	Label	Route
1	YES	BOX IA2AA
2	NO	BOX IA2AA
	Don't Know	BOX IA2AA
	Refused	BOX IA2AA

FIELD 1 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.INCYRMT3	1

BOX IA2AA

BOX INSTRUCTIONS

IF (IAINT9 - ADLTINHH = 1/Yes) OR (THERE IS AN ADULT AGE 15 OR OLDER LIVING WITH THE SP IN THE CURRENT ROUND OTHER THAN THE SPOUSE), GO TO IA17A - HHINCOME.

ELSE GO TO IA18A - HOMEPRBB.

Variable Name	Assignment Instructions
HHINCFLG	If (IAINT 9 - ADLTINHH ^= 1/Yes) and (there is no adult age 15 or older living with the SP in the current round other than the spouse), set INCO.HHINCFLG = 1/Yes.

IA17A

Code 1

QUESTION TEXT

SHOW CARD IA1A

According to our records, other than [you/(SP)/you and your (wife/husband)/(SP) and (his/her) (wife/husband)], at least one person 15 years of age or older lives in (your household/the household). Including their income as well as [your/(SP's)/you and your (wife's/husband's)/(SP) and (his/her) (wife's/husband's)] income, please look at this card and tell me which letter represents the total combined income of all the members of [your household/(SP's) household]. This includes income from jobs, Social Security, Railroad Retirement, other retirement, and any other money income received by all members of (your household/the household).

FIELD 1: HHINCOME

FIELD 1 ROUTING

Value	Label	Route
1	A	IA18A - HOMEPRBB
2	B	IA18A - HOMEPRBB
3	C	IA18A - HOMEPRBB
4	D	IA18A - HOMEPRBB
5	E	IA18A - HOMEPRBB
6	F	IA18A - HOMEPRBB
7	G	IA18A - HOMEPRBB
8	H	IA18A - HOMEPRBB
9	I	IA18A - HOMEPRBB
10	J	IA18A - HOMEPRBB
11	K	IA18A - HOMEPRBB
	Don't Know	IA18A - HOMEPRBB
	Refused	IA18A - HOMEPRBB

FIELD 1 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.HHINCOME	1

IA18A

Code 1

QUESTION TEXT

IF THE SP IS HOMELESS, IS TRANSIENT WITH NO PERMANENT HOME, OR IS IN JAIL OR PRISON, CODE WITHOUT ASKING. SELECT " SP IS HOMELESS/TRANSIENT/IN JAIL OR PRISON".

The next questions are about the place where [you/(SP)/you and your (wife/husband)/(SP) and (his/her) (wife/husband)] (live/lives/lived).

(Do/Did/Does) [you/(SP)/you and your (wife/husband)/(SP) and (his/her) (wife/husband)]] own the place where (you/he/she/they) (live/lives/lived), or (do/did/does) (you/he/she/they) rent it?

FIELD 1: HOMEPRBB

FIELD 1 ROUTING

Value	Label	Route
1	OWN	IA19 - HOMEEVAL
2	RENT	IA22 - HOMERENT
3	DOESN'T OWN OR RENT	IAINTRO4 - IAINT4
4	BOTH OWN AND RENT	DO NOT DISPLAY. DATA EDITING ONLY.
5	SP REPORTED SUBSIDIZED RENTAL HOUSING	DO NOT DISPLAY. DATA EDITING ONLY.
6	SP IS HOMELESS/TRANSIENT/IN JAIL OR PRISON	IAINTRO4 - IAINT4
	Don't Know	IAINTRO4 - IAINT4
	Refused	IAINTRO4 - IAINT4

FIELD 1 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.HOMEPRBB	1

IA19   Dollar

QUESTION TEXT

Please tell me the present value of [your/(SP's)/you and your (wife's/husband's)/(SP) and (his/her) (wife's/husband's)] home. About how much do you think this (house and lot/condominium unit) would sell for if it were for sale? Please give your best estimate.

FIELD 1: HOMEEVAL

FIELD 1 ROUTING

Value	Label	Route
1	[Continuous answer.]	IA20 - HOMEMORT
	Don't Know	IA20 - HOMEMORT
	Refused	IA20 - HOMEMORT

FIELD 1 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.HOMEEVAL	1

IA20

Code 1

QUESTION TEXT

(Do/Did/Does) [you/(SP)/you or your (wife/husband)/(SP) or (his/her) (wife/husband)] have a mortgage, deed of trust, home equity loan, or a land contract on the property?

FIELD 1: HOMEMORT

FIELD 1 ROUTING

Value	Label	Route
1	YES	IA21 - HOMEOWE
2	NO	IAINTRO4 - IAINT4
	Don't Know	IAINTRO4 - IAINT4
	Refused	IAINTRO4 - IAINT4

FIELD 1 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.HOMEMORT	1

IA21   Dollar

QUESTION TEXT

How much (do/did/does) [you/(SP)/you and your (wife/husband)/(SP) and (his/her) (wife/husband)] owe, in total, on any mortgages, deeds, loans, or land contracts for this property?

FIELD 1: HOMEOWE

FIELD 1 ROUTING

Value	Label	Route
1	[Continuous answer.]	IAINTRO4 - IAINT4
	Don't Know	IAINTRO4 - IAINT4
	Refused	IAINTRO4 - IAINT4

FIELD 1 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.HOMEOWE	1

IA22   Dollar

QUESTION TEXT

How much monthly rent (do/did/does) [you/(SP)/you and your (wife/husband)/(SP) and (his/her) (wife/husband)] pay for the place where (you/he/she/they) (live/lives/lived)?

FIELD 1: HOMERENT

FIELD 1 ROUTING

Value	Label	Route
1	[Continuous answer.]	IAINTRO4 - IAINT4
	Don't Know	IAINTRO4 - IAINT4
	Refused	IAINTRO4 - IAINT4

FIELD 1 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.HOMERENT	1

IAINTRO4 No Entry

QUESTION TEXT

Now, let's turn to savings or other assets which can be used to provide income. I will ask whether [you/(SP)/you and your (wife/husband)/(SP) and (his/her) (wife/husband)] had particular types of assets in (PREVIOUS YEAR). All these questions can be answered with a "yes" or a "no". [Please answer for [you and your (wife/husband)/(SP) and (his/her) (wife/husband)].

FIELD 1: IAINT4

FIELD 1 ROUTING

Value	Label	Route
1	CONTINUE	IA23A - IRAPROBE
	Empty	IA23A - IRAPROBE

FIELD 1 ATTRIBUTES

Cheshire Name	Answers Allowed
TEMP	1

IA23A   List

QUESTION TEXT

For all or part of (PREVIOUS YEAR), did [you/(SP)/you or your (wife/husband)/(SP) or (his/her) (wife/husband)]. . .

FIELD 1: IRAPROBE

have any IRA, Keogh, 401K accounts, thrift plans, or other retirement savings accounts?

FIELD 1 ROUTING

Value	Label	Route
1	YES	IA23A - SAVPROBE
2	NO	IA23A - SAVPROBE
	Don't Know	IA23A - SAVPROBE
	Refused	IA23A - SAVPROBE

FIELD 1 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.IRAPROBE	1

FIELD 2: SAVPROBE

have money in any kind of savings, interest earning checking, or other bank account? Include checking, savings, money market funds, certificates of deposit, or any other interest earning bank accounts.

FIELD 2 ROUTING

Value	Label	Route
1	YES	IA23A - BONDPROB
2	NO	IA23A - BONDPROB
	Don't Know	IA23A - BONDPROB

Value	Label	Route
	Refused	IA23A - BONDPROB

FIELD 2 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.SAVPROBE	1

FIELD 3: BONDPROB

have any stocks, mutual funds, municipal or corporate bonds, or U.S. Government securities such as savings bonds, treasury bills or bonds?

FIELD 3 ROUTING

Value	Label	Route
1	YES	IA23A - INSPROBE
2	NO	IA23A - INSPROBE
	Don't Know	IA23A - INSPROBE
	Refused	IA23A - INSPROBE

FIELD 3 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.BONDPROB	1

FIELD 4: INSPROBE

own any life insurance policies which build up cash equity (sometimes called whole life or universal life)?

FIELD 4 ROUTING

Value	Label	Route
1	YES	IA23B - PROPPROB
2	NO	IA23B - PROPPROB
	Don't Know	IA23B - PROPPROB
	Refused	IA23B - PROPPROB

FIELD 4 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.INSPROBE	1

IA23B

List

QUESTION TEXT

For all or part of (PREVIOUS YEAR), did [you/(SP)/you or your (wife/husband)/(SP) or (his/her) (wife/husband)] . . .

FIELD 1: PROPPROB

own any property, [other than (your/his/her/their) primary residence,] such as a vacation home, apartment house, commercial property, or rental property?

FIELD 1 ROUTING

Value	Label	Route
1	YES	IA23B - CARPROBE
2	NO	IA23B - CARPROBE
	Don't Know	IA23B - CARPROBE
	Refused	IA23B - CARPROBE

FIELD 1 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.PROPPROB	1

FIELD 2: CARPROBE

own any cars, trucks, recreational vehicles, or boats?

FIELD 2 ROUTING

Value	Label	Route
1	YES	IA23B - ASTPROBE
2	NO	IA23B - ASTPROBE
	Don't Know	IA23B - ASTPROBE

Value	Label	Route
	Refused	IA23B - ASTPROBE

FIELD 2 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.CARPROBE	1

FIELD 3: ASTPROBE

have any other savings, assets, a business or professional practice, property such as a farm, mortgages from which payments are received, or any other financial investments not already mentioned?

FIELD 3 ROUTING

Value	Label	Route
1	YES	IA30 - ASTCODE
2	NO	BOX IA2
	Don't Know	BOX IA2
	Refused	BOX IA2

FIELD 3 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.ASTPROBE	1

IA30

Code All

QUESTION TEXT

What type of asset is it?

CHECK ALL THAT APPLY.

FIELD 1: ASTCODE

FIELD 1 ROUTING

Value	Label	Route
1	SAVINGS	BOX IA2
2	ASSETS	DATA EDITING ONLY. DO NOT DISPLAY.
3	FARM	BOX IA2
4	BUSINESS	BOX IA2
5	PROFESSIONAL PRACTICE	BOX IA2
91	OTHER	IA30 - ASTSPECI
	Don't Know	BOX IA2
	Refused	BOX IA2

FIELD 1 ATTRIBUTES

Cheshire Name	Answers Allowed
NONE REPLACES THE FOLLOWING CHESHIRE VARIABLES: 1=INCO.ASTSAVNG 2=INCO.ASTASSET 3=INCO.ASTFARM 4=INCO.ASTBUSIN 5=INCO.ASTPRACT 91=INCO.ASTOTHER	6

FIELD 2: ASTSPECI

OTHER (SPECIFY)

FIELD 2 ROUTING

Value	Label	Route
1	[Continuous answer.]	BOX IA2

FIELD 2 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.ASTSPECI	1

BOX IA2

BOX INSTRUCTIONS

IF AT LEAST ONE ASSET PROBE AT IA23A OR IA23B WAS ANSWERED "YES", GO TO IA31 - ASSTTOTL.

ELSE GO TO IA34 - OTHDEBTS.

IA31 Dollar

QUESTION TEXT

SHOW CARD IA2

You've mentioned [READ ASSETS LISTED BELOW]. Please estimate [your/(SP's)/you and your (wife's/husband's)/(SP) and (his/her) (wife's/husband's)] assets for (PREVIOUS YEAR). Do not include interest or dividend payments already reported as income. [Please exclude the value of (your/his/her/their) home.]

[(retirement savings accounts/other bank accounts/stocks, mutual funds, bonds/life insurance policies/other property/vehicles/other assets)]

FIELD 1: ASSTTOTL

FIELD 1 ROUTING

Value	Label	Route
1	[Continuous answer.]	IA32 - ASSTDEBT
	Don't Know	IA31A - VALSSET
	Refused	IA31A - VALSSET

FIELD 1 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.ASSTTOTL	1

IA31A   Code 1

QUESTION TEXT

It is often difficult to place an exact dollar amount on the value of assets. Thinking about all of the assets that you mentioned, [READ ASSETS LISTED BELOW], would you say that the total value of [your/(SP's)/you and your (wife's/husband's)/(SP) and (his/her) (wife's/husband's)] assets for (PREVIOUS YEAR) was less than $40,000.00 or was it $40,000.00 or more?

[(retirement savings accounts/other bank accounts/stocks, mutual funds, bonds/life insurance policies/other property/vehicles/other assets)]

[READ IF NECESSARY: Again do not include interest or dividend payments already reported as income [, and please exclude the value of (your/his/her/their) home]].

FIELD 1: VALSSET

FIELD 1 ROUTING

Value	Label	Route
1	LESS THAN $40,000.00	IA31B - VALPICK
2	$40,000.00 OR MORE	IA31B - VALPICK
	Don't Know	IA32 - ASSTDEBT
	Refused	IA32 - ASSTDEBT

FIELD 1 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.VALSSET	1

IA31B   Code 1

QUESTION TEXT

SHOW CARD (IA3/IA4)

Which of these categories do you think is a good estimate of the total value of [your/(SP's)/you and your (wife's/husband's)/(SP) and (his/her) (wife's/husband's)] assets for (PREVIOUS YEAR)?

[READ IF NECESSARY: You mentioned the following assets: [READ ASSETS LISTED BELOW].]

[(retirement savings accounts/other bank accounts/stocks, mutual funds, bonds/life insurance policies/other property/vehicles/other assets)]

FIELD 1: VALPICK

INCO.VALPICK

FIELD 1 ROUTING

Value	Label	Route
1	A	IA32 - ASSTDEBT
2	B	IA32 - ASSTDEBT
3	C	IA32 - ASSTDEBT
4	D	IA32 - ASSTDEBT
5	E	IA32 - ASSTDEBT
6	F	IA32 - ASSTDEBT
7	G	IA32 - ASSTDEBT
8	H	IA32 - ASSTDEBT
	Don't Know	IA32 - ASSTDEBT
	Refused	IA32 - ASSTDEBT

FIELD 1 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.VALPICK	1

IA32

Code 1

QUESTION TEXT

(Do/Did/Does) [you/(SP)/you or your (wife/husband)/(SP) or (his/her) (wife/husband)] have any outstanding debts associated with the [READ ASSETS LISTED BELOW]?

[(retirement savings accounts/other bank accounts/stocks, mutual funds, bonds/life insurance policies/other property/vehicles/other assets)]

FIELD 1: ASSTDEBT

FIELD 1 ROUTING

Value	Label	Route
1	YES	IA33 - ADEBTTOT
2	NO	IA34 - OTHDEBTS
	Don't Know	IA34 - OTHDEBTS
	Refused	IA34 - OTHDEBTS

FIELD 1 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.ASSTDEBT	1

IA33   Dollar

QUESTION TEXT

How much (do/did/does) [you/(SP)/you and your (wife/husband)/(SP) and (his/her) (wife/husband)] owe, in total, on these debts?

FIELD 1: ADEBTTOT

FIELD 1 ROUTING

Value	Label	Route
1	[Continuous answer.]	IA34 - OTHDEBTS
	Don't Know	IA34 - OTHDEBTS
	Refused	IA34 - OTHDEBTS

FIELD 1 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.ADEBTTOT	1

IA34

Code 1

QUESTION TEXT

(Do/Did/Does) [you/(SP)/you or your (wife/husband)/(SP) or (his/her) (wife/husband)] have any (other) outstanding debts (that we haven't talked about), such as credit card charges, loans, medical bills, or legal bills?

FIELD 1: OTHDEBTS

FIELD 1 ROUTING

Value	Label	Route
1	YES	IA35 - DEBTTOT
2	NO	BOX IA6
	Don't Know	BOX IA6
	Refused	BOX IA6

FIELD 1 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.OTHDEBTS	1

IA35   Dollar

QUESTION TEXT

If you added up all of these other debts for [you/(SP)/you and your (wife/husband)/(SP) and (his/her) (wife/husband)], about how much would they amount to right now?

FIELD 1: DEBTTOT

FIELD 1 ROUTING

Value	Label	Route
1	[Continuous answer.]	IA36 - DEBTMED
	Don't Know	BOX IA6
	Refused	BOX IA6

FIELD 1 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.DEBTTOT	1

IA36 Dollar

QUESTION TEXT

How much of the (AMOUNT FROM IA35) is for medical care costs?

FIELD 1: DEBTMED

FIELD 1 ROUTING

Value	Label	Route
1	[Continuous answer.]	BOX IA6
	Don't Know	BOX IA6
	Refused	BOX IA6

FIELD 1 ATTRIBUTES

Cheshire Name	Answers Allowed
INCO.DEBTMED	1

BOX IA6

BOX INSTRUCTIONS

GO TO NEXT SECTION