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**To:** New Beneficiary Survey user

**From:** Howard Iams, Statistician

Office of Research and Statistics/ Division of Program Analysis

**Date:** October 18, 2011

**Subject:** Longitudinal imputations of income and assets--

New Beneficiary Data System

==============================================================================

Temple University's Institute for Survey Research (ISR) statistically imputed missing information on income and assets in the 1982 New Beneficiary Survey (NBS) and in the 1991 New Beneficiary Followup (NBF) to the NBS. The imputation process for both the 1982 NBS and the 1991 NBF was based on information available in each cross sectional survey. If missing information in one survey was contained in the other survey and circumstances were predictable, then longitudinal imputations would improve the imputation process. SSA contracted with the University of Michigan's Institute for Survey Research (UMISR) to assess missing information across the NBS and NBF and to develop longitudinal imputations based on information in the other survey.

We are making available a data file to you on the INTERNET with longitudinal imputations for income and assets in the New Beneficiary Data System. The file can be matched to the 1982 NBS and the 1991 NBF using the variable named "CASE". The data file is in ASCII format. We have received documentation from UMISR on preparation of the file (see the attached June 1996 draft of the report at the end of this note). We have prepared a codebook which contains a variable name, a brief summary, and a column location. The codebook and data file are best referenced through a set of summary tables which identify the variable type and the variable name in the file. The attached labels in the file also clarify the subject of the variable. Longitudinal imputations were calculated only for cases with interviews in both the 1982 New Beneficiary Survey (NBS) and in the 1991 New Beneficiary Followup (NBF). All income amounts are for a three month period.

In general, variable names ending in S refer to data from the 1982 NBS. Variable names ending in F refer to the 1991 NBF.  The Social Security Administration/ Office of Research, Evaluation, and Statistics made four changes to the file provided by UMISR. First, the imputation flag was coded 1 if imputations were made by UMISR or previously by the ISR. The original file coded 1 if UMISR imputed longitudinally, 2 if there was a cross-sectional imputation by ISR, and 3 for some asset income items missing the time period for the income. Second, the asset items missing the time period for income in the NBF were completed based on judgements made by SSA/ORES. This involved a handful of cases. Third, alimony was combined with interhousehold transfers. Fourth, income amounts were rounded to four significant digits, left justified. The latter two procedures were made by SSA/ORES because of privacy restrictions.

Please note that 5 variables from the 1982 New Beneficiary Survey have topcoded amounts. IABNDNBS (Bond holding amount), IASTKNBS(Stock holding amount), and IABUSNBS(Business holding amount) are topcoded 9999990. IAIRRNBS(Individual Retirement Acount/Keogh holding amount of respondent) is topcoded 999990. ICOTHNBS(other income we have talked about) is topcoded 99990.

Codebook layout for longitudinal file

Name Item Location

CASE CASE: CASE NUMBER 1 ‑ 5

IHMMNBS IMP NBS MM HOLD. 6 ‑ 6

IHMMNBF IMP NBF MM HOLD. 7 ‑ 7

FHMMNBS NBS IMP FLAG MM HOLD. 8 ‑ 8

FHMMNBF NBF IMP FLAG MM HOLD. 9 ‑ 9

IHCDNBS IMP NBS CD HOLD. 10 ‑ 10

IHCDNBF IMP NBF CD HOLD. 11 ‑ 11

FHCDNBS NBS IMP FLAG CD HOLD. 12 ‑ 12

FHCDNBF NBF IMP FLAG CD HOLD. 13 ‑ 13

IHSAVNBS IMP NBS SAVING HOLD. 14 ‑ 14

IHSAVNBF IMP NBF SAVING HOLD. 15 ‑ 15

FHSAVNBS NBS IMP FLAG SAVING HOLD. 16 ‑ 16

FHSAVNBF NBF IMP FLAG SAVING HOLD. 17 ‑ 17

IHCHKNBS IMP NBS CHECK. HOLD. 18 ‑ 18

IHCHKNBF IMP NBF CHECK. HOLD. 19 ‑ 19

FHCHKNBS NBS IMP FLAG CHECK. HOLD. 20 ‑ 20

FHCHKNBF NBF IMP FLAG CHECK. HOLD. 21 ‑ 21

IHBNDNBS IMP NBS BONDS HOLD. 22 ‑ 22

IHBNDNBF IMP NBF BONDS HOLD. 23 ‑ 23

FHBNDNBS NBS IMP FLAG BONDS HOLD. 24 ‑ 24

FHBNDNBF NBF IMP FLAG BONDS HOLD. 25 ‑ 25

IHSTKNBS IMP NBS STOCKS HOLD. 26 ‑ 26

IHSTKNBF IMP NBF STOCKS HOLD. 27 ‑ 27

FHSTKNBS NBS IMP FLAG STOCKS HOLD. 28 ‑ 28

FHSTKNBF NBF IMP FLAG STOCKS HOLD. 29 ‑ 29

IHIRRNBS IMP NBS IRA(RESP.) HOLD. 30 ‑ 30

IHIRRNBF IMP NBF IRA(RESP.) HOLD. 31 ‑ 31

FHIRRNBS NBS IMP FLAG IRA(RESP.) HOLD. 32 ‑ 32

FHIRRNBF NBF IMP FLAG IRA(RESP.) HOLD. 33 ‑ 33

IHIRSNBS IMP NBS IRA(SPOUSE) HOLD. 34 ‑ 34

IHIRSNBF IMP NBF IRA(SPOUSE) HOLD. 35 ‑ 35

FHIRSNBS NBS IMP FLAG IRA(SPOUSE) HOLD. 36 ‑ 36

FHIRSNBF NBF IMP FLAG IRA(SPOUSE) HOLD. 37 ‑ 37

IHHOMNBS IMP NBS HOME OWNERSHIP 38 ‑ 38

IHHOMNBF IMP NBF HOME OWNERSHIP 39 ‑ 39

FHHOMNBS NBS IMP FLAG HOME OWNERSHIP 40 ‑ 40

FHHOMNBF NBF IMP FLAG HOME OWNERSHIP 41 ‑ 41

IHBUSNBS IMP NBS BUSI. HOLD. 42 ‑ 42

IHBUSNBF IMP NBF BUSI. HOLD. 43 ‑ 43

FHBUSNBS NBS IMP FLAG BUSI. HOLD. 44 ‑ 44

FHBUSNBF NBF IMP FLAG BUSI. HOLD. 45 ‑ 45

IHPRFNBS IMP NBS PROF. PRAC. HOLD. 46 ‑ 46

IHPRFNBF IMP NBF PROF. PRAC. HOLD. 47 ‑ 47

FHPRFNBS NBS IMP FLAG PROF. PRAC. HOLD. 48 ‑ 48

FHPRFNBF NBF IMP FLAG PROF. PRAC. HOLD. 49 ‑ 49

IHFRMNBS IMP NBS FARM HOLD. 50 ‑ 50

IHFRMNBF IMP NBF FARM HOLD. 51 ‑ 51

FHFRMNBS NBS IMP FLAG FARM HOLD. 52 ‑ 52

FHFRMNBF NBF IMP FLAG FARM HOLD. 53 ‑ 53

IHPRPNBS IMP NBS PROP. HOLD. 54 ‑ 54

IHPRPNBF IMP NBF PROP. HOLD. 55 ‑ 55

FHPRPNBS NBS IMP FLAG PROP. HOLD. 56 ‑ 56

FHPRPNBF NBF IMP FLAG PROP. HOLD. 57 ‑ 57

IHOTHNBS IMP NBS OTHER INC HOLD. 58 ‑ 58

IHOTHNBF IMP NBF OTHER INC HOLD. 59 ‑ 59

FHOTHNBS NBS IMP FLAG OTHER INC HOLD. 60 ‑ 60

FHOTHNBF NBF IMP FLAG OTHER INC HOLD. 61 ‑ 61

IHRBDNBS IMP NBS ROOM. & BOARD. HOLD. 62 ‑ 62

IHRBDNBF IMP NBF ROOM. & BOARD. HOLD. 63 ‑ 63

FHRBDNBS NBS IMP FLAG ROOM. & BOARD. HOLD. 64 ‑ 64

FHRBDNBF NBF IMP FLAG ROOM. & BOARD. HOLD. 65 ‑ 65

IHLRPNBS IMP NBS LOAN REPAY. HOLD. 66 ‑ 66

IHLRPNBF IMP NBF LOAN REPAY. HOLD. 67 ‑ 67

FHLRPNBS NBS IMP FLAG LOAN REPAY. HOLD. 68 ‑ 68

FHLRPNBF NBF IMP FLAG LOAN REPAY. HOLD. 69 ‑ 69

IHLFRNBS IMP NBS LIFE INS.(RESP.) HOLD. 70 ‑ 70

IHLFRNBF IMP NBF LIFE INS.(RESP.) HOLD. 71 ‑ 71

FHLFRNBS NBS IMP FLAG LIFE INS.(RESP.) HOLD. 72 ‑ 72

FHLFRNBF NBF IMP FLAG LIFE INS.(RESP.) HOLD. 73 ‑ 73

IHLFSNBS IMP NBS LIFE INS.(SPOUSE) HOLD. 74 ‑ 74

IHLFSNBF IMP NBF LIFE INS.(SPOUSE) HOLD. 75 ‑ 75

FHLFSNBS NBS IMP FLAG LIFE INS.(SPOUSE) HOLD. 76 ‑ 76

FHLFSNBF NBF IMP FLAG LIFE INS.(SPOUSE) HOLD. 77 ‑ 77

IHVEHNBS IMP NBS VEHICLES HOLD. 78 ‑ 78

IHVEHNBF IMP NBF VEHICLES HOLD. 79 ‑ 79

FHVEHNBS NBS IMP FLAG VEHICLES HOLD. 80 ‑ 80

FHVEHNBF NBF IMP FLAG VEHICLES HOLD. 81 ‑ 81

IAMMNBS IMP NBS MM AMT 82 ‑ 88

IACDNBS IMP NBS CD AMT 89 ‑ 95

IAMMNBF IMP NBF MM AMT 96 ‑ 101

IACDNBF IMP NBF CD AMT 102 ‑ 108

FAMMNBS NBS IMP FLAG MM AMT 109 ‑ 109

FACDNBS NBS IMP FLAG CD AMT 110 ‑ 110

FAMMNBF NBF IMP FLAG MM AMT 111 ‑ 111

FACDNBF NBF IMP FLAG CD AMT 112 ‑ 112

IASAVNBS IMP NBS SAVING AMT 113 ‑ 118

IACHKNBS IMP NBS CHECK. AMT 119 ‑ 124

IASAVNBF IMP NBF SAVING AMT 125 ‑ 130

IACHKNBF IMP NBF CHECK. AMT 131 ‑ 136

FASAVNBS NBS IMP FLAG SAVING AMT 137 ‑ 137

FACHKNBS NBS IMP FLAG CHECK. AMT 138 ‑ 138

FASAVNBF NBF IMP FLAG SAVING AMT 139 ‑ 139

FACHKNBF NBF IMP FLAG CHECK. AMT 140 ‑ 140

IABNDNBS IMP NBS BONDS AMT 141 ‑ 147

IASTKNBS IMP NBS STOCKS AMT 148 ‑ 154

IABNDNBF IMP NBF BONDS AMT 155 ‑ 162

IASTKNBF IMP NBF STOCKS AMT 163 ‑ 169

FABNDNBS NBS IMP FLAG BONDS AMT 170 ‑ 170

FASTKNBS NBS IMP FLAG STOCKS AMT 171 ‑ 171

FABNDNBF NBF IMP FLAG BONDS AMT 172 ‑ 172

FASTKNBF NBF IMP FLAG STOCKS AMT 173 ‑ 173

IAIRRNBS IMP NBS IRA(RESP.) AMT 174 ‑ 179

IAIRSNBS IMP NBS IRA(SPOUSE) AMT 180 ‑ 185

IAIRRNBF IMP NBF IRA(RESP.) AMT 186 ‑ 191

IAIRSNBF IMP NBF IRA(SPOUSE) AMT 192 ‑ 197

FAIRRNBS NBS IMP FLAG IRA(RESP.) AMT 198 ‑ 198

FAIRSNBS NBS IMP FLAG IRA(SPOUSE) AMT 199 ‑ 199

FAIRRNBF NBF IMP FLAG IRA(RESP.) AMT 200 ‑ 200

FAIRSNBF NBF IMP FLAG IRA(SPOUSE) AMT 201 ‑ 201

IAHOMNBS IMP NBS HOME MARKET AMT 202 ‑ 208

IAHOMNBF IMP NBF HOME MARKET AMT 209 ‑ 215

IABUSNBS IMP NBS BUSI. EQU. AMT 216 ‑ 222

IAPRFNBS IMP NBS PROF. EQU. AMT 223 ‑ 228

IAFRMNBS IMP NBS FARM EQU. AMT 229 ‑ 235

IAPRPNBS IMP NBS PROP. EQU. AMT 236 ‑ 242

IABUSNBF IMP NBF BUSI. GROSS AMT 243 ‑ 249

IAPRFNBF IMP NBF PROF. GROSS AMT 250 ‑ 256

IAFRMNBF IMP NBF FARM GROSS AMT 257 ‑ 263

IAPRPNBF IMP NBF PROP. GROSS AMT 264 ‑ 270

FABUSNBS NBS IMP FLAG BUSI. EQU. AMT 271 ‑ 271

FAPRFNBS NBS IMP FLAG PROF. EQU. AMT 272 ‑ 272

FAFRMNBS NBS IMP FLAG FARM EQU. AMT 273 ‑ 273

FAPRPNBS NBS IMP FLAG PROP. EQU. AMT 274 ‑ 274

FABUSNBF NBF IMP FLAG BUSI. GROSS AMT 275 ‑ 275

FAPRFNBF NBF IMP FLAG PROF. GROSS AMT 276 ‑ 276

FAFRMNBF NBF IMP FLAG FARM GROSS AMT 277 ‑ 277

FAPRPNBF NBF IMP FLAG PROP. GROSS AMT 278 ‑ 278

FAHOMNBS NBS IMP FLAG HOME MARKET AMT 279 ‑ 279

FAHOMNBF NBF IMP FLAG HOME MARKET AMT 280 ‑ 280

ICMMNBS IMP NBS MM INC AMT 281 ‑ 285

ICCDNBS IMP NBS CD INC AMT 286 ‑ 290

ICSAVNBS IMP NBS SAVING INC AMT 291 ‑ 295

ICCHKNBS IMP NBS CHECK. INC AMT 296 ‑ 299

ICBNDNBS IMP NBS BONDS INC AMT 300 ‑ 304

ICSTKNBS IMP NBS STOCKS INC AMT 305 ‑ 309

ICIRRNBS IMP NBS IRA(RESP.) INC AMT 310 ‑ 314

ICIRSNBS IMP NBS IRA(SPOUSE) INC AMT 315 ‑ 318

ICMMNBF IMP NBF MM INC AMT 319 ‑ 323

ICCDNBF IMP NBF CD INC AMT 324 ‑ 329

ICSAVNBF IMP NBF SAVING INC AMT 330 ‑ 334

ICCHKNBF IMP NBF CHECK. INC AMT 335 ‑ 339

ICBNDNBF IMP NBF BONDS INC AMT 340 ‑ 345

ICSTKNBF IMP NBF STOCKS INC AMT 346 ‑ 351

ICIRRNBF IMP NBF IRA(RESP.) INC AMT 352 ‑ 357

ICIRSNBF IMP NBF IRA(SPOUSE) INC AMT 358 ‑ 362

ICHOMNBS IMP NBS HOME MORT. AMT 363 ‑ 369

ICHOMNBF IMP NBF HOME MORT. AMT 370 ‑ 375

ICPRPNBS IMP NBS PROP. INC AMT 376 ‑ 381

ICPRPNBF IMP NBF PROP. INC AMT 382 ‑ 386

FCPRPNBS NBS IMP FLAG PROP. INC AMT 387 ‑ 387

FCPRPNBF NBF IMP FLAG PROP. INC AMT 388 ‑ 388

ICOTHNBS IMP NBS OTHER INCOME 389 ‑ 393

ICOTHNBF IMP NBF OTHER INCOME 394 ‑ 399

ICRBDNBS IMP NBS ROOM. & BOARD. INC 400 ‑ 403

ICRBDNBF IMP NBF ROOM. & BOARD. INC 404 ‑ 407

ICLRPNBS IMP NBS LOAN REPAY. INC 408 ‑ 413

ICLRPNBF IMP NBF LOAN REPAY. INC 414 ‑ 418

FCMMNBS NBS IMP FLAG MM INC AMT 419 ‑ 419

FCMMNBF NBF IMP FLAG MM INC AMT 420 ‑ 420

FCCDNBS NBS IMP FLAG CD INC AMT 421 ‑ 421

FCCDNBF NBF IMP FLAG CD INC AMT 422 ‑ 422

FCSAVNBS NBS IMP FLAG SAVING INC AMT 423 ‑ 423

FCSAVNBF NBF IMP FLAG SAVING INC AMT 424 ‑ 424

FCCHKNBS NBS IMP FLAG CHECK. INC AMT 425 ‑ 425

FCCHKNBF NBF IMP FLAG CHECK. INC AMT 426 ‑ 426

FCBNDNBS NBS IMP FLAG BONDS INC AMT 427 ‑ 427

FCBNDNBF NBF IMP FLAG BONDS INC AMT 428 ‑ 428

FCSTKNBS NBS IMP FLAG STOCKS INC AMT 429 ‑ 429

FCSTKNBF NBF IMP FLAG STOCKS INC AMT 430 ‑ 430

FCIRRNBS NBS IMP FLAG IRA(RESP.) INC AMT 431 ‑ 431

FCIRRNBF NBF IMP FLAG IRA(RESP.) INC AMT 432 ‑ 432

FCIRSNBS NBS IMP FLAG IRA(SPOUSE) INC AMT 433 ‑ 433

FCIRSNBF NBF IMP FLAG IRA(SPOUSE) INC AMT 434 ‑ 434

FCHOMNBS NBS IMP FLAG HOME MORT. AMT 435 ‑ 435

FCHOMNBF NBF IMP FLAG HOME MORT. AMT 436 ‑ 436

FCOTHNBS NBS IMP FLAG OTHER INCOME 437 ‑ 437

FCRBDNBS NBS IMP FLAG ROOM. & BOARD. INC 438 ‑ 438

FCLRPNBS NBS IMP FLAG LOAN REPAY. INC 439 ‑ 439

FCOTHNBF NBF IMP FLAG OTHER INCOME 440 ‑ 440

FCRBDNBF NBF IMP FLAG ROOM. & BOARD. INC 441 ‑ 441

FCLRPNBF NBF IMP FLAG LOAN REPAY. INC 442 ‑ 442

I1981F IMP NBF PROPERTIES DEBT 443 ‑ 449

I1993F IMP NBF BUSI. PROF. AND FARM DEBT 450 ‑ 455

FL1981F IMP FLAG FOR I1981F 456 ‑ 456

FL1993F IMP FLAG FOR I1993F 457 ‑ 457

IEDU IMP YEAR OF EDUC 458 ‑ 459

I1262S IMP NBS IRA(RESP) RETURN IND 460 ‑ 460

I1266S IMP NBS IRA(SPOUSE) RETURN IND 461 ‑ 461

FL1262S IMP FLAG FOR I1262S 462 ‑ 462

FL1266S IMP FLAG FOR I1266S 463 ‑ 463

IWSSNBS NBS IMP SS WHO RECV 464 ‑ 464

IWSSNBF NBF IMP SS WHO RECV 465 ‑ 465

FLWSSNBS NBS IMP SS WHO RECV FLAG 466 ‑ 466

FLWSSNBF NBF IMP SS WHO RECV FLAG 467 ‑ 467

FARSSNBS NBS IMP RES SS AMT FLAG 468 ‑ 468

FASSSNBS NBS IMP SPSE SS AMT FLAG 469 ‑ 469

FARSSNBF NBF IMP RES SS AMT FLAG 470 ‑ 470

FASSSNBF NBF IMP SPSE SS AMT FLAG 471 ‑ 471

IRSSAMS NBS IMP R SS AMT (166A‑168A/185A‑187A) 472 ‑ 477

ISSSAMS NBS IMP S SS AMT (185B‑187B) 478 ‑ 482

ICSSAMS NBS IMP C SS AMT (185C‑187C) 483 ‑ 486

FACSSNBS NBS IMP COMB SS AMT FLAG 487 ‑ 487

IRSSAMF NBF IMP R SS AMT (340A‑342A/352AR‑354AR) 488 ‑ 492

ISSSAMF NBF IMP S SS AMT (352AS‑354AS) 493 ‑ 497

ICSSAMF NBF IMP C SS AMT (352AC‑354AC) 498 ‑ 501

FACSSNBF NBF IMP COMB SS AMT FLAG 502 ‑ 502

FWSSINBS NBS IMP SSI WHO RECV FLAG 503 ‑ 503

IWSSINBF NBF IMP SSI WHO RECV 504 ‑ 504

FWSSINBF NBF IMP SSI WHO RECV FLAG 505 ‑ 505

FARSINBS NBS IMP RES SSI AMT FLAG 506 ‑ 506

FASSINBS NBS IMP SPSE SSI AMT FLAG 507 ‑ 507

FACSINBS NBS IMP COMB SSI AMT FLAG 508 ‑ 508

FARSINBF NBF IMP RES SSI AMT FLAG 509 ‑ 509

FASSINBF NBF IMP SPSE SSI AMT FLAG 510 ‑ 510

FACSINBF NBF IMP COMB SSI AMT FLAG 511 ‑ 511

IRSIAMS NBS IMP R SSI AMT(166B‑168B/185BR‑187BR) 512 ‑ 515

ISSIAMS NBS IMP S SSI AMT (185BS‑187BS) 516 ‑ 519

ICSIAMS NBS IMP C SSI AMT (185BC‑187BC) 520 ‑ 523

IRSIAMF NBF IMP R SSI AMT(340B‑342B/352BR‑354BR) 524 ‑ 527

ISSIAMF NBF IMP S SSI AMT (352BS‑354BS) 528 ‑ 531

ICSIAMF NBF IMP C SSI AMT (352BC‑354BC) 532 ‑ 534

IWSSINBS NBS IMP SSI WHO RECV 535 ‑ 535

FLRRNBF NBF IMP FLAG RAILROAD 536 ‑ 536

FLRRNBS NBS IMP FLAG RAILROAD 537 ‑ 537

IRRRNBF NBF RAILROAD (339C/349C) 538 ‑ 538

IRRRNBS NBS RAILROAD (165C/182C) 539 ‑ 539

FLRRWHS NBS RR IMPUTED WHO REC. FLAG 540 ‑ 540

FLRRWHF NBF RR IMPUTED WHO REC. FLAG 541 ‑ 541

IRRRAMF NBF R RR IMP AMNT(340C‑342C/352C‑354C) 542 ‑ 545

ISRRAMF NBF S RR IMP AMNT(340C‑342C/352C‑354C) 546 ‑ 549

ICRRAMF NBF C RR IMP AMNT(352C‑354C) 550 ‑ 552

IRRRAMS NBS R RR IMP AMNT(166C‑168C/185C‑187C) 553 ‑ 556

ISRRAMS NBS S RR IMP AMNT(166C‑168C/185C‑187C) 557 ‑ 560

ICRRAMS NBS C RR IMP AMNT(185C‑187C) 561 ‑ 561

FRRRAMF NBF R RR IMP AMNT IMP FLG 562 ‑ 562

FSRRAMF NBF S RR IMP AMNT IMP FLG 563 ‑ 563

FCRRAMF NBF C RR IMP AMNT IMP FLG 564 ‑ 564

FRRRAMS NBS R RR IMP AMNT IMP FLG 565 ‑ 565

FSRRAMS NBS S RR IMP AMNT IMP FLG 566 ‑ 566

FCRRAMS NBS C RR IMP AMNT IMP FLG 567 ‑ 567

IRRRWHF NBF RR IMPUTED WHO RECEIVES 568 ‑ 568

IRRRWHS NBS RR IMPUTED WHO RECEIVES 569 ‑ 569

FLBLNBF NBF IMP FLAG BLCK LUNG 570 ‑ 570

FLBLNBS NBS IMP FLAG BLCK LUNG 571 ‑ 571

IRBLNBF NBF BLCK LUNG (339D/349D) 572 ‑ 572

IRBLNBS NBS BLCK LUNG (165D/182D) 573 ‑ 573

IRBLWHS NBS IMPUTED WHO RECEIVES 574 ‑ 574

IRBLWHF NBF IMPUTED WHO RECEIVES 575 ‑ 575

IRBLAMF NBF R BL IMP AMNT(340D‑342D/352D‑354D) 576 ‑ 579

ISBLAMF NBF S BL IMP AMNT(340D‑342D/352D‑354D) 580 ‑ 583

ICBLAMF NBF C BL IMP AMNT(352D‑354D) 584 ‑ 587

IRBLAMS NBS R BL IMP AMNT(166D‑168D/185D‑187D) 588 ‑ 591

ISBLAMS NBS S BL IMP AMNT(166D‑168D/185D‑187D) 592 ‑ 595

ICBLAMS NBS C BL IMP AMNT(185D‑187D) 596 ‑ 599

FRBLAMF NBF R BL IMP AMNT IMP FLG 600 ‑ 600

FSBLAMF NBF S BL IMP AMNT IMP FLG 601 ‑ 601

FCBLAMF NBF C BL IMP AMNT IMP FLG 602 ‑ 602

FRBLAMS NBS R BL IMP AMNT IMP FLG 603 ‑ 603

FSBLAMS NBS S BL IMP AMNT IMP FLG 604 ‑ 604

FCBLAMS NBS C BL IMP AMNT IMP FLG 605 ‑ 605

FLBLWHS NBS IMPUTED WHO RECEIVES FLAG 606 ‑ 606

FLBLWHF NBF IMPUTED WHO RECEIVES FLAG 607 ‑ 607

FLVBNBF NBF IMP FLAG VET BENF 608 ‑ 608

FLVBNBS NBS IMP FLAG VET BENF 609 ‑ 609

IRVBNBF NBF VET BENF (339E/349E) 610 ‑ 610

IRVBNBS NBS VET BENF (165E/182E) 611 ‑ 611

IRVBWHF NBF VB IMP WHO 612 ‑ 612

FLVBWHF NBF VB IMP WHO FLG 613 ‑ 613

FRVBAMF NBF R VB IMP AMNT FLG 614 ‑ 614

FSVBAMF NBF S VB IMP AMNT FLG 615 ‑ 615

FCVBAMF NBF C VB IMP AMNT FLG 616 ‑ 616

FRVBAMS NBS R VB IMP AMNT FLG 617 ‑ 617

FSVBAMS NBS S VB IMP AMNT FLG 618 ‑ 618

FCVBAMS NBS C VB IMP AMNT FLG 619 ‑ 619

IRVBWHS NBS VB IMP WHO 620 ‑ 620

FLVBWHS NBS VB IMP WHO FLG 621 ‑ 621

IRVBAMS NBS R VB IMP AMNT (166E‑168E/185E‑187E) 622 ‑ 626

ISVBAMS NBS S VB IMP AMNT (166E‑168E/185E‑187E) 627 ‑ 630

ICVBAMS NBS C VB IMP AMNT (185E‑187E) 631 ‑ 634

IRVBAMF NBF R VB IMP AMNT (340E‑342E/352E‑354E) 635 ‑ 639

ISVBAMF NBF S VB IMP AMNT (340E‑342E/352E‑354E) 640 ‑ 643

ICVBAMF NBF C VB IMP AMNT (352E‑354E) 644 ‑ 647

FLSLWNBF NBF IMP FLAG STATE LOCAL BENF 648 ‑ 648

FLSLWNBS NBS IMP FLAG STATE LOCAL BENF 649 ‑ 649

IRSLWNBF NBF STATE LOCAL BENF (339F/349F) 650 ‑ 650

IRSLWNBS NBS STATE LOCAL BENF (165F/182F) 651 ‑ 651

IRSLWWHF NBF SLW IMP WHO 652 ‑ 652

FLSLWWHF NBF SLW IMP WHO FLG 653 ‑ 653

IRSLWWHS NBS SLW IMP WHO 654 ‑ 654

FLSLWWHS NBS SLW IMP WHO FLG 655 ‑ 655

IRSLWAMF NBF R SLW IMP AMNT(340F‑342F/352F‑354F) 656 ‑ 659

ISSLWAMF NBF S SLW IMP AMNT(340F‑342F/352F‑354F) 660 ‑ 663

ICSLWAMF NBF C SLW IMP AMNT(352F‑354F) 664 ‑ 667

IRSLWAMS NBS R SLW IMP AMNT(166F‑168F/185F‑187F) 668 ‑ 671

ISSLWAMS NBS S SLW IMP AMNT(166F‑168F/185F‑187F) 672 ‑ 675

ICSLWAMS NBS C SLW IMP AMNT(185F‑187F) 676 ‑ 679

FRSLWAMF NBF R SLW IMP AMNT IMP FLG 680 ‑ 680

FSSLWAMF NBF S SLW IMP AMNT IMP FLG 681 ‑ 681

FCSLWAMF NBF C SLW IMP AMNT IMP FLG 682 ‑ 682

FRSLWAMS NBS R SLW IMP AMNT IMP FLG 683 ‑ 683

FSSLWAMS NBS S SLW IMP AMNT IMP FLG 684 ‑ 684

FCSLWAMS NBS C SLW IMP AMNT IMP FLG 685 ‑ 685

FLERNNBS NBS ERN IMPUTED RECEIPT FLAG 686 ‑ 686

FLERNNBF NBF ERN IMPUTED RECEIPT FLAG 687 ‑ 687

FLSSNBF NBF SS IMPUTED RECEIPT FLAG 688 ‑ 688

FLSSNBS NBS SS IMPUTED RECEIPT FLAG 689 ‑ 689

FLSSINBF NBF SSI IMPUTED RECEIPT FLAG 690 ‑ 690

FLSSINBS NBS SSI IMPUTED RECEIPT FLAG 691 ‑ 691

IRERNNBF NBF ERN (345A/357A) 692 ‑ 692

IRERNNBS NBF ERN (171A/190A) 693 ‑ 693

IRSSNBF NBF SOC. SEC. (339A/349A) 694 ‑ 694

IRSSNBS NBS SOC. SEC. (165A/182A) 695 ‑ 695

IRSSINBF NBF SUP. SOC. SEC (339B/349B) 696 ‑ 696

IRSSINBS NBS SUP. SOC. SEC (165B/182B) 697 ‑ 697

FLERNWHF NBF IMPUTED WHO RECIEVES FLAG 698 ‑ 698

FLERNWHS NBS IMPUTED WHO RECIEVES FLAG 699 ‑ 699

IRERNWHF NBF IMPUTED WHO RECIEVES 700 ‑ 700

IRERNWHS NBS IMPUTED WHO RECIEVES 701 ‑ 701

IRERNAMF NBF R ERN IMP AMNT (346A‑348A/359A‑361A) 702 ‑ 707

ISERNAMF NBF S ERN IMP AMNT (346A‑348A/359A‑361A) 708 ‑ 713

ICERNAMF NBF C ERN IMP AMNT (359A‑361A) 714 ‑ 718

IRERNAMS NBS R ERN IMP AMNT (172A‑174A/192A‑194A) 719 ‑ 724

ISERNAMS NBS S ERN IMP AMNT (172A‑174A/192A‑194A) 725 ‑ 729

ICERNAMS NBS C ERN IMP AMNT (192A‑194A) 730 ‑ 735

FRERNAMF NBF R ERN IMP AMNT IMP FLG 736 ‑ 736

FSERNAMF NBF S ERN IMP AMNT IMP FLG 737 ‑ 737

FRERNAMS NBS R ERN IMP AMNT IMP FLG 738 ‑ 738

FSERNAMS NBS S ERN IMP AMNT IMP FLG 739 ‑ 739

FCERNAMF NBF C ERN IMP AMNT IMP FLG 740 ‑ 740

FCERNAMS NBS C ERN IMP AMNT IMP FLG 741 ‑ 741

FLSLGNBF NBF IMP FLAG STATE LOCAL PEN 742 ‑ 742

FLSLGNBS NBS IMP FLAG STATE LOCAL PEN 743 ‑ 743

IRSLGNBF NBF STATE LOCAL PEN (345B/357B) 744 ‑ 744

IRSLGNBS NBS STATE LOCAL PEN (171B/190B) 745 ‑ 745

IRSLGWHF NBF SLG IMP WHO 746 ‑ 746

FLSLGWHF NBF SLG IMP WHO FLG 747 ‑ 747

FRSLGAMF NBF R SLG IMP AMNT IMP FLG 748 ‑ 748

FSSLGAMF NBF S SLG IMP AMNT IMP FLG 749 ‑ 749

FCSLGAMF NBF C SLG IMP AMNT IMP FLG 750 ‑ 750

FRSLGAMS NBS R SLG IMP AMNT IMP FLG 751 ‑ 751

FSSLGAMS NBS S SLG IMP AMNT IMP FLG 752 ‑ 752

FCSLGAMS NBS C SLG IMP AMNT IMP FLG 753 ‑ 753

IRSLGWHS NBS SLG IMP WHO 754 ‑ 754

FLSLGWHS NBS SLG IMP WHO FLG 755 ‑ 755

IRSLGAMF NBF R SLG IMP AMNT(346B‑348B/359B‑361B) 756 ‑ 760

ISSLGAMF NBF S SLG IMP AMNT(346B‑348B/359B‑361B) 761 ‑ 765

ICSLGAMF NBF C SLG IMP AMNT(359B‑361B) 766 ‑ 769

IRSLGAMS NBS R SLG IMP AMNT(172B‑174B/192B‑194B) 770 ‑ 774

ISSLGAMS NBS S SLG IMP AMNT(172B‑174B/192B‑194B) 775 ‑ 779

ICSLGAMS NBS C SLG IMP AMNT(192B‑194B) 780 ‑ 783

FLMRPNBF NBF IMP FLAG MIL. RESRV. PEN 784 ‑ 784

FLMRPNBS NBS IMP FLAG MIL. RESRV. PEN 785 ‑ 785

IRMRPNBF NBF MIL. RESRV. PEN (345C/357C) 786 ‑ 786

IRMRPNBS NBS MIL. RESRV. PEN (171C/190C) 787 ‑ 787

IRMRPWHF NBF MRP IMP WHO 788 ‑ 788

FLMRPWHF NBF MRP IMP WHO FLG 789 ‑ 789

FRMRPAMF NBF R MRP IMP AMNT FLG 790 ‑ 790

FSMRPAMF NBF S MRP IMP AMNT FLG 791 ‑ 791

FCMRPAMF NBF C MRP IMP AMNT FLG 792 ‑ 792

FRMRPAMS NBS R MRP IMP AMNT FLG 793 ‑ 793

FSMRPAMS NBS S MRP IMP AMNT FLG 794 ‑ 794

FCMRPAMS NBS C MRP IMP AMNT FLG 795 ‑ 795

IRMRPWHS NBS MRP IMP WHO 796 ‑ 796

FLMRPWHS NBS MRP IMP WHO FLG 797 ‑ 797

IRMRPAMS NBS R MRP IMP AMNT (172C‑174C/192C‑194C) 798 ‑ 802

ISMRPAMS NBS S MRP IMP AMNT (172C‑174C/192C‑194C) 803 ‑ 806

ICMRPAMS NBS C MRP IMP AMNT (192C‑194C) 807 ‑ 807

IRMRPAMF NBF R MRP IMP AMNT (346C‑348C/359C‑361C) 808 ‑ 812

ISMRPAMF NBF S MRP IMP AMNT (346C‑348C/359C‑361C) 813 ‑ 817

ICMRPAMF NBF C MRP IMP AMNT (359C‑361C) 818 ‑ 821

FLFEPNBF NBF IMP FLAG FEDERAL PEN 822 ‑ 822

FLFEPNBS NBS IMP FLAG FEDERAL PEN 823 ‑ 823

IRFEPNBF NBF FEDERAL PEN (345D/357D) 824 ‑ 824

IRFEPNBS NBS FEDERAL PEN (171D/190D) 825 ‑ 825

IRFEPWHF NBF FEP IMP WHO 826 ‑ 826

FLFEPWHF NBF FEP IMP WHO FLG 827 ‑ 827

FRFEPAMF NBF R FEP IMP AMNT IMP FLG 828 ‑ 828

FSFEPAMF NBF S FEP IMP AMNT IMP FLG 829 ‑ 829

FCFEPAMF NBF C FEP IMP AMNT IMP FLG 830 ‑ 830

FRFEPAMS NBS R FEP IMP AMNT IMP FLG 831 ‑ 831

FSFEPAMS NBS S FEP IMP AMNT IMP FLG 832 ‑ 832

FCFEPAMS NBS C FEP IMP AMNT IMP FLG 833 ‑ 833

IRFEPWHS NBS FEP IMP WHO 834 ‑ 834

FLFEPWHS NBS FEP IMP WHO FLG 835 ‑ 835

IRFEPAMF NBF R FEP IMP AMNT(346D‑348D/359D‑361D) 836 ‑ 840

ISFEPAMF NBF S FEP IMP AMNT(346D‑348D/359D‑361D) 841 ‑ 845

ICFEPAMF NBF C FEP IMP AMNT(359D‑361D) 846 ‑ 849

IRFEPAMS NBS R FEP IMP AMNT(172D‑174D/192D‑194D) 850 ‑ 854

ISFEPAMS NBS S FEP IMP AMNT(172D‑174D/192D‑194D) 855 ‑ 859

ICFEPAMS NBS C FEP IMP AMNT(192D‑194D) 860 ‑ 860

IWANNNBS NBS IMP ANN WHO RECV 861 ‑ 861

FWANNNBS NBS IMP ANN WHO RECV FLAG 862 ‑ 862

IWANNNBF NBF IMP ANN WHO RECV 863 ‑ 863

FWANNNBF NBF IMP ANN WHO RECV FLAG 864 ‑ 864

IRANNNBF NBF IMP ANN RECIPIENCY 865 ‑ 865

IRANNNBS NBS IMP ANN RECIPIENCY 866 ‑ 866

FLANNNBF NBF IMP ANN RECIPIENCY FLAG 867 ‑ 867

FLANNNBS NBS IMP ANN RECIPIENCY FLAG 868 ‑ 868

FARANNBS NBS IMP RES ANN AMT FLAG 869 ‑ 869

IRANAMS NBS IMP R ANN AMT(172F‑174F/192FR‑194FR) 870 ‑ 875

FASANNBS NBS IMP SPSE ANN AMT FLAG 876 ‑ 876

ISANAMS NBS IMP S ANN AMT (192BS‑194BS) 877 ‑ 881

FACANNBS NBS IMP COMB ANN AMT FLAG 882 ‑ 882

ICANAMS NBS IMP C ANN AMT (192BC‑194BC) 883 ‑ 886

FARANNBF NBF IMP RES ANN AMT FLAG 887 ‑ 887

IRANAMF NBF IMP R ANN AMT(346G‑348G/359GR‑361GR) 888 ‑ 893

FASANNBF NBF IMP SPSE ANN AMT FLAG 894 ‑ 894

ISANAMF NBF IMP S ANN AMT (359GS‑361GS) 895 ‑ 899

FACANNBF NBF IMP COMB ANN AMT FLAG 900 ‑ 900

ICANAMF NBF IMP C ANN AMT (359GC‑361GC) 901 ‑ 905

FLWCNBF NBF IMP FLAG WORKMANS COMP 906 ‑ 906

FLWCNBS NBS IMP FLAG WORKMANS COMP 907 ‑ 907

IRWCNBF NBF WORKMANS COMP (345H/357H) 908 ‑ 908

IRWCNBS NBS WORKMANS COMP (171G/190G) 909 ‑ 909

IRWCWHF NBF WC IMP WHO 910 ‑ 910

FLWCWHF NBF WC IMP WHO FLG 911 ‑ 911

FRWCAMF NBF R WC IMP AMNT IMP FLG 912 ‑ 912

FSWCAMF NBF S WC IMP AMNT IMP FLG 913 ‑ 913

FCWCAMF NBF C WC IMP AMNT IMP FLG 914 ‑ 914

FRWCAMS NBS R WC IMP AMNT IMP FLG 915 ‑ 915

FSWCAMS NBS S WC IMP AMNT IMP FLG 916 ‑ 916

FCWCAMS NBS C WC IMP AMNT IMP FLG 917 ‑ 917

IRWCWHS NBS WC IMP WHO 918 ‑ 918

FLWCWHS NBS WC IMP WHO FLG 919 ‑ 919

IRWCAMF NBF R WC IMP AMNT(346H‑348H/359H‑361H) 920 ‑ 923

ISWCAMF NBF S WC IMP AMNT(346H‑348H/359H‑361H) 924 ‑ 927

ICWCAMF NBF C WC IMP AMNT(359H‑361H) 928 ‑ 928

IRWCAMS NBS R WC IMP AMNT(172G‑174G/192G‑194G) 929 ‑ 933

ISWCAMS NBS S WC IMP AMNT(172G‑174G/192G‑194G) 934 ‑ 937

ICWCAMS NBS C WC IMP AMNT(192G‑194G) 938 ‑ 941

FLUCNBF NBF IMP FLAG UNEMP COMP 942 ‑ 942

FLUCNBS NBS IMP FLAG UNEMP COMP 943 ‑ 943

IRUCNBF NBF UNEMP COMP (345I/357I) 944 ‑ 944

IRUCNBS NBS UNEMP COMP (171H/190H) 945 ‑ 945

IRUCWHF NBF UC IMP WHO 946 ‑ 946

FLUCWHF NBF UC IMP WHO FLG 947 ‑ 947

FRUCAMF NBF R UC IMP AMNT IMP FLG 948 ‑ 948

FSUCAMF NBF S UC IMP AMNT IMP FLG 949 ‑ 949

FCUCAMF NBF C UC IMP AMNT IMP FLG 950 ‑ 950

FRUCAMS NBS R UC IMP AMNT IMP FLG 951 ‑ 951

FSUCAMS NBS S UC IMP AMNT IMP FLG 952 ‑ 952

FCUCAMS NBS C UC IMP AMNT IMP FLG 953 ‑ 953

IRUCWHS NBS UC IMP WHO 954 ‑ 954

FLUCWHS NBS UC IMP WHO FLG 955 ‑ 955

IRUCAMF NBF R UC IMP AMNT(346I‑348I/359I‑361I) 956 ‑ 959

ISUCAMF NBF S UC IMP AMNT(346I‑348I/359I‑361I) 960 ‑ 963

ICUCAMF NBF C UC IMP AMNT(359I‑361I) 964 ‑ 964

IRUCAMS NBS R UC IMP AMNT(172H‑174H/191H‑194H) 965 ‑ 968

ISUCAMS NBS S UC IMP AMNT(172H‑174H/191H‑194H) 969 ‑ 972

ICUCAMS NBS C UC IMP AMNT(191H‑194H) 973 ‑ 973

FLETPNBF NBF IMP FLAG ESTATE TRUST 974 ‑ 974

FLETPNBS NBS IMP FLAG ESTATE TRUST 975 ‑ 975

IRETPNBF NBF ESTATE TRUST (345K/357K) 976 ‑ 976

IRETPNBS NBS ESTATE TRUST (171J/190J) 977 ‑ 977

IRETPWHF NBF ETP IMP WHO 978 ‑ 978

FLETPWHF NBF ETP IMP WHO FLG 979 ‑ 979

FRETPAMF NBF R ETP IMP AMNT FLG 980 ‑ 980

FSETPAMF NBF S ETP IMP AMNT FLG 981 ‑ 981

FCETPAMF NBF C ETP IMP AMNT FLG 982 ‑ 982

FRETPAMS NBS R ETP IMP AMNT FLG 983 ‑ 983

FSETPAMS NBS S ETP IMP AMNT FLG 984 ‑ 984

FCETPAMS NBS C ETP IMP AMNT FLG 985 ‑ 985

IRETPWHS NBS ETP IMP WHO 986 ‑ 986

FLETPWHS NBS ETP IMP WHO FLG 987 ‑ 987

IRETPAMF NBF R ETP IMP AMNT (346K‑348K/359K‑361K) 988 ‑ 992

ISETPAMF NBF S ETP IMP AMNT (346K‑348K/359K‑361K) 993 ‑ 997

ICETPAMF NBF C ETP IMP AMNT (359K‑361K) 998 ‑ 1002

IRETPAMS NBS R ETP IMP AMNT (172J‑174J/192J‑194J) 1003 ‑ 1007

ISETPAMS NBS S ETP IMP AMNT (172J‑174J/192J‑194J) 1008 ‑ 1012

ICETPAMS NBS C ETP IMP AMNT (192J‑194J) 1013 ‑ 1017

FLHTNBF NBF IMP FLAG HH TRANSFER 1018 ‑ 1018

FLHTNBS NBS IMP FLAG HH TRANSFER 1019 ‑ 1019

IRHTNBF NBF HH TRANSFER (345L/357L) 1020 ‑ 1020

IRHTNBS NBS HH TRANSFER (171K/190K) 1021 ‑ 1021

IRHTWHF NBF HT IMP WHO 1022 ‑ 1022

FLHTWHF NBF HT IMP WHO FLG 1023 ‑ 1023

FRHTAMF NBF R HT IMP AMNT FLG 1024 ‑ 1024

FSHTAMF NBF S HT IMP AMNT FLG 1025 ‑ 1025

FCHTAMF NBF C HT IMP AMNT FLG 1026 ‑ 1026

FRHTAMS NBS R HT IMP AMNT FLG 1027 ‑ 1027

FSHTAMS NBS S HT IMP AMNT FLG 1028 ‑ 1028

FCHTAMS NBS C HT IMP AMNT FLG 1029 ‑ 1029

IRHTWHS NBS HT IMP WHO 1030 ‑ 1030

FLHTWHS NBS HT IMP WHO FLG 1031 ‑ 1031

IRHTAMS NBS R HT IMP AMNT (172K‑174K/192K‑194K) 1032 ‑ 1035

ISHTAMS NBS S HT IMP AMNT (172K‑174K/192K‑194K) 1036 ‑ 1039

ICHTAMS NBS C HT IMP AMNT (192K‑194K) 1040 ‑ 1043

IRHTAMF NBF R HT IMP AMNT (346L‑348L/359L‑361L) 1044 ‑ 1047

ISHTAMF NBF S HT IMP AMNT (346L‑348L/359L‑361L) 1048 ‑ 1051

ICHTAMF NBF C HT IMP AMNT (359L‑361L) 1052 ‑ 1055

FLITNBF NBF IMP FLAG INTER HH TRANS 1056 ‑ 1056

FLITNBS NBS IMP FLAG INTER HH TRANS 1057 ‑ 1057

IRITNBF NBF INTER HH TRANS (345M/357M) 1058 ‑ 1058

IRITNBS NBS INTER HH TRANS (171L/190L) 1059 ‑ 1059

IRITWHF NBF IT IMP WHO 1060 ‑ 1060

FLITWHF NBF IT IMP WHO FLG 1061 ‑ 1061

FRITAMF NBF R IT IMP AMNT FLG 1062 ‑ 1062

FSITAMF NBF S IT IMP AMNT FLG 1063 ‑ 1063

FCITAMF NBF C IT IMP AMNT FLG 1064 ‑ 1064

FRITAMS NBS R IT IMP AMNT FLG 1065 ‑ 1065

FSITAMS NBS S IT IMP AMNT FLG 1066 ‑ 1066

FCITAMS NBS C IT IMP AMNT FLG 1067 ‑ 1067

IRITWHS NBS IT IMP WHO 1068 ‑ 1068

FLITWHS NBS IT IMP WHO FLG 1069 ‑ 1069

IRITAMS NBS R IT IMP AMNT (172L‑174L/192L‑194L) 1070 ‑ 1073

ISITAMS NBS S IT IMP AMNT (172L‑174L/192L‑194L) 1074 ‑ 1077

ICITAMS NBS C IT IMP AMNT (192L‑194L) 1078 ‑ 1081

IRITAMF NBF R IT IMP AMNT (346M‑348M/359M‑361M) 1082 ‑ 1086

ISITAMF NBF S IT IMP AMNT (346M‑348M/359M‑361M) 1087 ‑ 1091

ICITAMF NBF C IT IMP AMNT (359M‑361M) 1092 ‑ 1095

IWFSNBS NBS IMP FS WHO RECV 1096 ‑ 1096

FWFSNBS NBS IMP FS WHO RECV FLAG 1097 ‑ 1097

IWFSNBF NBF IMP FS WHO RECV 1098 ‑ 1098

FWFSNBF NBF IMP FS WHO RECV FLAG 1099 ‑ 1099

IRFSNBF NBF FOOD STMP (345N/357N) 1100 ‑ 1100

IRFSNBS NBS FOOD STMP (171M/190M) 1101 ‑ 1101

FLFSNBF NBF IMP FLAG FOOD STMP 1102 ‑ 1102

FLFSNBS NBS IMP FLAG FOOD STMP 1103 ‑ 1103

FARFSNBS NBS IMP RES FS AMT FLAG 1104 ‑ 1104

IRFSAMS NBS IMP R FS AMT(172M‑174M/192MR‑194MR) 1105 ‑ 1107

FASFSNBS NBS IMP SPSE FS AMT FLAG 1108 ‑ 1108

ISFSAMS NBS IMP S FS AMT (192MS‑194MS) 1109 ‑ 1109

FACFSNBS NBS IMP COMB FS AMT FLAG 1110 ‑ 1110

ICFSAMS NBS IMP C FS AMT (192MC‑194MC) 1111 ‑ 1114

FARFSNBF NBF IMP RES FS AMT FLAG 1115 ‑ 1115

IRFSAMF NBF IMP R FS AMT(346N‑346N/359NR‑361NR) 1116 ‑ 1119

FASFSNBF NBF IMP SPSE FS AMT FLAG 1120 ‑ 1120

ISFSAMF NBF IMP S FS AMT (359NS‑361NS) 1121 ‑ 1124

FACFSNBF NBF IMP COMB FS AMT FLAG 1125 ‑ 1125

ICFSAMF NBF IMP C FS AMT (359NC‑361NC) 1126 ‑ 1129

IWPEUNBS NBS IMP PEN WHO RECV 1130 ‑ 1130

FWPEUNBS NBS IMP PEN WHO RECV FLAG 1131 ‑ 1131

IWPEUNBF NBF IMP PEN WHO RECV 1132 ‑ 1132

FWPEUNBF NBF IMP PEN WHO RECV FLAG 1133 ‑ 1133

IRPEUNBF NBF IMP PEN RECIPIENCY 1134 ‑ 1134

IRPEUNBS NBS IMP PEN RECIPIENCY 1135 ‑ 1135

FLPEUNBF NBF IMP PEN RECIPIENCY FLAG 1136 ‑ 1136

FLPEUNBS NBS IMP PEN RECIPIENCY FLAG 1137 ‑ 1137

FARPENBS NBS IMP RES PEN AMT FLAG 1138 ‑ 1138

IRPEAMS NBS IMP R PEN AMT(172E‑174E/192ER‑194ER) 1139 ‑ 1143

FASPENBS NBS IMP SPSE PEN AMT FLAG 1144 ‑ 1144

ISPEAMS NBS IMP S PEN AMT (192ES‑194ES) 1145 ‑ 1149

FACPENBS NBS IMP COMB PEN AMT FLAG 1150 ‑ 1150

ICPEAMS NBS IMP C PEN AMT (192EC‑194EC) 1151 ‑ 1154

FARPENBF NBF IMP RES PEN AMT FLAG 1155 ‑ 1155

IRPEAMF NBF IMP R PEN AMT(346E‑348E/359ER‑361ER) 1156 ‑ 1160

FASPENBF NBF IMP SPSE PEN AMT FLAG 1161 ‑ 1161

ISPEAMF NBF IMP S PEN AMT (359ES‑361ES) 1162 ‑ 1166

FACPENBF NBF IMP COMB PEN AMT FLAG 1167 ‑ 1167

ICPEAMF NBF IMP C PEN AMT (359EC‑361EC) 1168 ‑ 1171

The following tables summarize the longitudinal data file.

Table 1: NBS Asset-Related Variables Subject to Imputation

NBS Holding Variable, name beginning with IH: Coded 1=yes, 2=no.

NBS Holding Imputation Flag,name beginning with FH: Coded 1=imputation, 0=no imputation.

NBS Value of Asset Variable, name beginning with IA in dollars.

NBS Value of Asset Imputation Flag, name beginning with FA: Coded 1=imputation, 0=no imputation.

NBS Asset Income Variable, name beginning with IC: coded as a three-month amount, even if asked as an annual amount in the questionnaire.

NBS Asset Income Imputation Flag, name beginning with FC: Coded 1=imputation, 0=no imputation.

Middle letters indicate the asset source. Usually the variable label identifies.

MM= money market

CD=certificate of deposit

SAV= savings and credit union accounts

CHK=checking

BND=bounds

STK=stocks and mutual funds

IRR= IRA/Keough of respondent

IRS=IRA/Keough of spouse

HOM=Home ownership

BUS= business equity

PRF=professional practice

FRM=Farm Equity

PRP=Properties

OTH=other income than we have taked about

RB=Roomers and Boarders

LRP=Loan Repayment Income

LFR= Life insurance of repondent

LFS= life insurance of spouse

VEH=Vehicles

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| --- | --- | --- | --- | --- | --- | --- |
| **Table 1: NBS Asset-Related Variables Subject to Imputation** | | | | | | |
| **Asset Variable** | **NBS**  **Holding**  **Variable** | **NBS Holding Imputation Flag** | **NBS Value of Asset**  **Variable** | **NBS Value of Asset Imputation Flag** | **NBS Asset Income Variable** | **NBS Asset Income Imputation Flag** |
| Money Market Accounts | IHMMNBS | FHMMNBS | IAMMNBS | FAMMNBS | ICMMNBS | FCMMNBS |
| Certificates of Deposit | IHCDNBS | FHCDNBS | IACDNBS | FACDNBS | ICCDNBS | FCCDNBS |
| Savings/Credit Union Accounts | IHSAVNBS | FHSAVNBS | IASAVNBS | FASAVNBS | ICSAVNBS | FCSAVNBS |
| Checking Accounts | IHCHKNBS | FHCHKNBS | IACHKNBS | FACHKNBS | ICCHKNBS | FCCHKNBS |
| Bonds | IHBNDNBS | FHBNDNBS | IABNDNBS | FABNDNBS | ICBNDNBS | FCBNDNBS |
| Stocks and Mutual Funds | IHSTKNBS | FHSTKNBS | IASTKNBS | FASTKNBS | ICSTKNBS | FCSTKNBS |
| IRA/KEOGH (Respondent) | IHIRRNBS | FHIRRNBS | IAIRRNBS | FAIRRNBS | ICIRRNBS | FCIRRNBS |
| IRA/KEOGH (Spouse) | IHIRSNBS | FHIRSNBS | IAIRSNBS | FAIRSNBS | ICIRSNBS | FCIRSNBS |
| Own or Buying Home | IHHOMNBS | FHHOMNBS | IAHOMNBS | FAHOMNBS | ICHOMNBS | FCHOMNBS |
| Business Equity | IHBUSNBS | HFBUSNBS | IABUSNBS | FABUSNBS | NA | NA |
| Professional Practice Equity | IHPRFNBS | HFPRFNBS | IAPRFNBS | FAPRFNBS | NA | NA |
| Farm Equity | IHFRMNBS | FHFRMNBS | IAFRMNBS | FAFRMNBS | NA | NA |
| Own or Buying Rental Property  Own or Buying Vacation Home  Own or Buying Commercial Prp.  Own or Buying Land | IHPRPNBS | FHPRPNBS | IAPRPNBS | FAPRPNBS | ICPRPNBS | FCPRPNBS |
| Other Income | IHOTHNBS | FHOTHNBS | NA | NA | ICOTHNBS | FCOTHNBS |
| Roomers and Boarders | IHRBDNBS | FHRBDNBS | NA | NA | ICRBDNBS | FCRBDNBS |
| Loan Repayment | IHLRPNBS | FHLRPNBS | NA | NA | ICLRPNBS | FCLRPNBS |
| Life Insurance (Respondent) | IHLFRNBS | FHLFRNBS | NA | NA | NA | NA |
| Life Insurance (Spouse) | IHLFSNBS | FHLFSNBS | NA | NA | NA | NA |
| Vehicles | IHVEHNBS | FHVEHNBS | NA | NA | NA | NA |

Table 2: NBS Asset-related variables subject to Imputation

NBF Holding Variable, name beginning with IH: Coded 1=yes, 2=no.

NBF Holding Imputation Flag,name beginning with FH: Coded 1=imputation, 0=no imputation.

NBF Value of Asset Variable, name beginning with IA in dollars.

NBF Value of Asset Imputation Flag, name beginning with FA: Coded 1=imputation, 0=no imputation.

NBF Asset Income Variable, name beginning with IC: Coded as a three-month amount, even if asked as an annual amount in the questionnaire.

NBF Asset Income Imputation Flag, name beginning with FC: Coded 1=imputation, 0=no imputation.

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| **Table 2: NBF Asset-Related Variables Subject to Imputation** | | | | | | |
| **Asset Variable** | **NBF**  **Holding**  **Variable** | **NBF Holding Imputation Flag** | **NBF Value of Asset**  **Variable** | **NBF Value of Asset Imputation Flag** | **NBF Asset Income Variable** | **NBF Asset Income Imputation Flag[[1]](#footnote-1)** |
| Money Market Accounts | IHMMNBF | FHMMNBF | IAMMNBF | FAMMNBF | ICMMNBF | FCMMNBF |
| Certificates of Deposit | IHCDNBF | FHCDNBF | IACDNBF | FACDNBF | ICCDNBF | FCCDNBF |
| Savings/Credit Union Accounts | IHSAVNBF | FHSAVNBF | IASAVNBF | FASAVNBF | ICSAVNBF | FCSAVNBF |
| Checking Accounts | IHCHKNBF | FHCHKNBF | IACHKNBF | FACHKNBF | ICCHKNBF | FCCHKNBF |
| Bonds | IHBNDNBF | FHBNDNBF | IABNDNBF | FABNDNBF | ICBNDNBF | FCBNDNBF |
| Stocks and Mutual Funds | IHSTKNBF | FHSTKNBF | IASTKNBF | FASTKNBF | ICSTKNBF | FCSTKNBF |
| IRA/KEOGH (Respondent) | IHIRRNBF | FHIRRNBF | IAIRRNBF | FAIRRNBF | ICIRRNBF | FCIRRNBF |
| IRA/KEOGH (Spouse) | IHIRSNBF | FHIRSNBF | IAIRSNBF | FAIRSNBF | ICIRSNBF | FCIRSNBF |
| Own or Buying Home | IHHOMNBF | FHHOMNBF | IAHOMNBF | FAHOMNBF | ICHOMNBF | FCHOMNBF |
| Business Equity | IHBUSNBF | HFBUSNBF | IABUSNBF | FABUSNBF | NA | NA |
| Professional Practice Equity | IHPRFNBF | HFPRFNBF | IAPRFNBF | FAPRFNBF | NA | NA |
| Farm Equity | IHFRMNBF | FHFRMNBF | IAFRMNBF | FAFRMNBF | NA | NA |
| Own/Buying Rental Prp., Vacation Home, Commercial Prp., or Land | IHPRPNBF | FHPRPNBF | IAPRPNBF | FAPRPNBF | ICPRPNBF | FCPRPNBF |
| Other Income | IHOTHNBF | FHOTHNBF | NA | NA | ICOTHNBF | FCOTHNBF |
| Roomers and Boarders | IHRBDNBF | FHRBDNBF | NA | NA | ICRBDNBF | FCRBDNBF |
| Loan Repayment | IHLRPNBF | FHLRPNBF | NA | NA | ICLRPNBF | FCLRPNBF |
| Life Insurance (Respondent) | IHLFRNBF | FHLFRNBF | NA | NA | NA | NA |
| Life Insurance (Spouse) | IHLFSNBF | FHLFSNBF | NA | NA | NA | NA |
| Vehicles | IHVEHNBF | FHVEHNBF | NA | NA | NA | NA |

Table 3: NBS Income-Related Variables Subject to Imputation

NBS Income Recipiency indicator, name beginning with IR: Coded 1= income present, 0= no income present.

NBS Income Recipiency Imputation Flag, name beginning with FL: Coded 1= imputation, 0=no imputation.

NBS Who Receives Income, name beginning with I and contains WSS, WHS, or W : Coded 1= respondent, 2=spouse,

3= both respondent and spouse.

NBS Who Receives Income Imputation Flag, name beginning with F and contains WSS, WHS, or W:

Coded 1=imputation, 0= no imputation.

NBS Respondent Income Amount, name beginning with IR and contains AMS.

NBS Respondent Income Amount Imputation Flag, name beginning with FR or FAR: Coded 1=imputation, 0=no imputation.

NBS Spouse Income Amount, name beginning with IS and contains AMS.

NBS Spouse Income Amount Imputation Flag, name beginning with FS or FAS: Coded 1=imputation, 0=no imputation.

NBS Combined Income Amount, name beginning IC and contains AMS.

NBS Combined Income Amount Imputation Flag, name beginning with FC or FAC: Coded 1=imputation, 0=no imputation

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| **Table 3: NBS Income-Related Variables Subject to Imputation** | | | | | | | | | | |
|  | **NBS Income**  **Recipiency** | | **NBS Who Receives Income** | | **NBS Respondent Income Amount** | | **NBS Spouse Income**  **Amount** | | **NBS Combined Income**  **Amount** | |
| **Income Variable** | **Indicator** | **Imputation Flag** | **Indicator** | **Imputation Flag** | **Amount** | **Imputation**  **Flag** | **Amount** | **Imputation Flag** | **Amount** | **Imputation Flag** |
| Social Security | IRSSNBS | FLSSNBS | IWSSNBS | FLWSSNBS | IRSSAMS | FARSSNBS | ISSSAMS | FASSSNBS | ICSSAMS | FACSSNBS |
| Supplemental Security Income | IRSSINBS | FLSSINBS | IWSSINBS | FWSSINBS | IRSIAMS | FARSINBS | ISSIAMS | FASSINBS | ICSIAMS | FACSINBS |
| Railroad Retirement | IRRRNBS | FLRRNBS | IRRRWHS | FRRRWHS | IRRRAMS | FRRRAMS | ISRRAMS | FSRRAMS | ICRRAMS | FCRRAMS |
| Black Lung Benefits | IRBLNBS | FLBLNBS | IRBLWHS | FRBLWHS | IRBLAMS | FRBLAMS | ISBLAMS | FSBLAMS | ICBLAMS | FCBLAMS |
| Veteran's Benefits | IRVBNBS | FLVBNBS | IRVBWHS | FRVBWHS | IRVBAMS | FRVBAMS | ISVBAMS | FSVBAMS | ICVBAMS | FCVBAMS |
| State/Local Welfare | IRSLWNBS | FLSLWNBS | IRSLWWHS | FRSLWWHS | IRSLWAMS | FRSLWAMS | ISSLWAMS | FSSLWAMS | ICSLWAMS | FCSLWAMS |
| Earnings from Job | IRERNNBS | FLERNNBS | IRERNWHS | FRERNWHS | IRERNAMS | FRERNAMS | ISERNAMS | FSERNAMS | ICERNAMS | FCERNAMS |
| State/Local Government Pension | IRSLGNBS | FLSLGNBS | IRSLGWHS | FRSLGWHS | IRSLGAMS | FRSLGAMS | ISSLGAMS | FSSLGAMS | ICSLGAMS | FCSLGAMS |
| Military/Reserve Pension | IRMRPNBS | FLMRPNBS | IRMRPWHS | FRMRPWHS | IRMRPAMS | FRMRPAMS | ISMRPAMS | FSMRPAMS | ICMRPAMS | FCMRPAMS |
| Federal Employee Pension | IRFEPNBS | FLFEPNBS | IRFEPWHS | FRFEPWHS | IRFEPAMS | FRFEPAMS | ISFEPAMS | FSFEPAMS | ICFEPAMS | FCFEPAMS |
| Private Employer/Union Pension | IRPEUNBS | FLPEUNBS | IWPEUNBS | FWPEUNBS | IRPEAMS | FARPENBS | ISPEAMS | FASPENBS | ICPEAMS | FACPENBS |
| Annuities | IRANNNBS | FLANNNBS | IWANNNBS | FWANNNBS | IRANAMS | FARANNBS | ISANAMS | FASANNBS | ICANAMS | FACANNBS |
| Worker's Compensation | IRWCNBS | FLWCNBS | IRWCWHS | FRWCWHS | IRWCAMS | FRWCAMS | ISWCAMS | FSWCAMS | ICWCAMS | FCWCAMS |
| Unemployment Compensation | IRUCNBS | FLUCNBS | IRUCWHS | FRUCWHS | IRUCAMS | FRUCAMS | ISUCAMS | FSUCAMS | ICUCAMS | FCUCAMS |
| Alimony/Child Support | IRACSNBS | FLACSNBS | IRACSWHS | FRACSWHS | IRACSAMS | FRACSAMS | ISACSAMS | FSACSAMS | ICACSAMS | FCACSAMS |
| Estate/Trust Payment, Royalties | IRETPNBS | FLETPNBS | IRETPWHS | FRETPWHS | IRETPAMS | FRETPAMS | ISETPAMS | FSETPAMS | ICETPAMS | FCETPAMS |
| Household Transfers | IRHTNBS | FLHTNBS | IRHTWHS | FRHTWHS | IRHTAMS | FRHTAMS | ISHTAMS | FSHTAMS | ICHTAMS | FCHTAMS |
| Interhousehold Transfers | IRITNBS | FLITNBS | IRITWHS | FRITWHS | IRITAMS | FRITAMS | ISITAMS | FSITAMS | ICITAMS | FCITAMS |
| Food Stamps | IRFSNBS | FLFSNBS | IWFSNBS | FWFSNBS | IRFSAMS | FARFSNBS | ISFSAMS | FASFSNBS | ICFSAMS | FACFSNBS |

Table 4: NBF Income-Related Variables Subject to Imputation

NBF Income Recipiency indicator, name beginning with IR: Coded 1= income present 0= no income present.

NBF Income Recipiency Imputation Flag, name beginning with FL: Coded 1= imputation, 0=no imputation.

NBF Who Receives Income, name beginning with I and containing WSS, WHS,or W : Coded 1= respondent, 2=spouse,

3= both respondent and spouse.

NBF Who Receives Income Imputation Flag, name beginning with F and containing WSS, WHS, or W:

Coded 1=imputation, 0= no imputation.

NBF Respondent Income Amount, name beginning with IR and containing AMF.

NBF Respondent Income Amount Imputation Flag, name beginning with FR or FAR: Coded 1=imputation, 0=no imputation.

NBF Spouse Income Amount, name beginning with IS and containing AMF.

NBF Spouse Income Amount Imputation Flag, name beginning with FS or FAS: Coded 1=imputation, 0=no imputation.

NBF Combined Income Amount, name beginning with IC and containing AMF.

NBF Combined Income Amount Imputation Flag, name beginning with FC or FAC: Coded 1=imputation, 0=no imputation.

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| **Table 4: NBF Income-Related Variables Subject to Imputation** | | | | | | | | | | |
|  | **NBF Income**  **Recipiency** | | **NBF Who Receives Income** | | **NBF Respondent Income Amount** | | **NBF Spouse Income**  **Amount** | | **NBF Combined Income**  **Amount** | |
| **Income Variable** | **Indicator** | **Imputation Flag** | **Indicator** | **Imputation Flag** | **Amount** | **Imputation**  **Flag** | **Amount** | **Imputation Flag** | **Amount** | **Imputation Flag** |
| Social Security | IRSSNBF | FLSSNBF | IWSSNBF | FLWSSNBF | IRSSAMF | FARSSNBF | ISSSAMF | FASSSNBF | ICSSAMF | FACSSNBF |
| Supplemental Security Income | IRSSINBF | FLSSINBF | IWSSINBF | FWSSINBF | IRSIAMF | FARSINBF | ISSIAMF | FASSINBF | ICSIAMF | FACSINBF |
| Railroad Retirement | IRRRNBF | FLRRNBF | IRRRWHF | FRRRWHF | IRRRAMF | FRRRAMF | ISRRAMF | FSRRAMF | ICRRAMF | FCRRAMF |
| Black Lung Benefits | IRBLNBF | FLBLNBF | IRBLWHF | FRBLWHF | IRBLAMF | FRBLAMF | ISBLAMF | FSBLAMF | ICBLAMF | FCBLAMF |
| Veteran's Benefits | IRVBNBF | FLVBNBF | IRVBWHF | FRVBWHF | IRVBAMF | FRVBAMF | ISVBAMF | FSVBAMF | ICVBAMF | FCVBAMF |
| State/Local Welfare | IRSLWNBF | FLSLWNBF | IRSLWWHF | FRSLWWHF | IRSLWAMF | FRSLWAMF | ISSLWAMF | FSSLWAMF | ICSLWAMF | FCSLWAMF |
| Earnings from Job | IRERNNBF | FLERNNBF | IRERNWHF | FRERNWHF | IRERNAMF | FRERNAMF | ISERNAMF | FSERNAMF | ICERNAMF | FCERNAMF |
| State/Local Government Pension | IRSLGNBF | FLSLGNBF | IRSLGWHF | FRSLGWHF | IRSLGAMF | FRSLGAMF | ISSLGAMF | FSSLGAMF | ICSLGAMF | FCSLGAMF |
| Military/Reserve Pension | IRMRPNBF | FLMRPNBF | IRMRPWHF | FRMRPWHF | IRMRPAMF | FRMRPAMF | ISMRPAMF | FSMRPAMF | ICMRPAMF | FCMRPAMF |
| Federal Employee Pension | IRFEPNBF | FLFEPNBF | IRFEPWHF | FRFEPWHF | IRFEPAMF | FRFEPAMF | ISFEPAMF | FSFEPAMF | ICFEPAMF | FCFEPAMF |
| Private Employer/Union Pension | IRPEUNBF | FLPEUNBF | IWPEUNBF | FWPEUNBF | IRPEAMF | FARPENBF | ISPEAMF | FASPENBF | ICPEAMF | FACPENBF |
| Annuities | IRANNNBF | FLANNNBF | IWANNNBF | FWANNNBF | IRANAMF | FARANNBF | ISANAMF | FASANNBF | ICANAMF | FACANNBF |
| Worker's Compensation | IRWCNBF | FLWCNBF | IRWCWHF | FRWCWHF | IRWCAMF | FRWCAMF | ISWCAMF | FSWCAMF | ICWCAMF | FCWCAMF |
| Unemployment Compensation | IRUCNBF | FLUCNBF | IRUCWHF | FRUCWHF | IRUCAMF | FRUCAMF | ISUCAMF | FSUCAMF | ICUCAMF | FCUCAMF |
| Alimony/Child Support | IRACSNBF | FLACSNBF | IRACSWHF | FRACSWHF | IRACSAMF | FRACSAMF | ISACSAMF | FSACSAMF | ICACSAMF | FCACSAMF |
| Estate/Trust Payment, Royalties | IRETPNBF | FLETPNBF | IRETPWHF | FRETPWHF | IRETPAMF | FRETPAMF | ISETPAMF | FSETPAMF | ICETPAMF | FCETPAMF |
| Household Transfers | IRHTNBF | FLHTNBF | IRHTWHF | FRHTWHF | IRHTAMF | FRHTAMF | ISHTAMF | FSHTAMF | ICHTAMF | FCHTAMF |
| Interhousehold Transfers | IRITNBF | FLITNBF | IRITWHF | FRITWHF | IRITAMF | FRITAMF | ISITAMF | FSITAMF | ICITAMF | FCITAMF |
| Food Stamps | IRFSNBF | FLFSNBF | IWFSNBF | FWFSNBF | IRFSAMF | FARFSNBF | ISFSAMF | FASFSNBF | ICFSAMF | FACFSNBF |

Table 5: Additional NBS or NBF Variables Imputed

These variables were imputed to permit estimates of net worth.

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| Table 5: Additional NBS or NBF Variables Imputed\* | | |
| Variable Description | Variable Name | Imputation Flag |
| Respondent Education in NBS (In Years) | IEDU | NA |
| Amount Owed on Properties in the NBF | I1981F | FL1981F |
| Amount Owed on Businesses, Professional Practices, and Farms in the NBF | I1993F | FL1993F |
| Whether Respondent Receives Regular IRA Payments/Withdrawals in NBS. This is Item 212 in the NBS Questionnaire | I1262S | FL1262S |
| Whether Spouse Receives Regular IRA Payments/Withdrawals in NBS. This is Item 216 in the NBS Questionnaire | I1266S | FL1266S |

Task 6

Item 10

Imputation Procedures and Outcomes in the New Beneficiary

and New Beneficiary Followup Surveys



Longitudinal Imputations for Validating Missing Data Within the Social Security Administration's New Beneficiary Fillip Survey

Date: Draft June 28, 1996

Prepared Under Contract No. 600-93-8905

Survey Research Center

The University of Michigan

Ann Arbor, Michigan

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**1. Introduction**

Even though alternative wave information for the dependent variable not available in some cases, other alternative wave covariates in model were significant and improved predictionNote: all models predicting NBF values which contained sex as a covariate correctly accounted for R's gender (gender not measured in NBF: have to use Wave 1 measure and convert if R a surviving spouse).Make sure Ting makes this change: case # 5675 change w‑2 reported home market value from 2,500,000 to 250,000 to match w‑1 home market value (note: R did not move and had no mortgage in either wave)Outliers due to stochastic term and how handledNBF var # 1999f:read incorrectly in asset.ssdmake sure ting updated imputation flags when missing life was subsequently imputedimputation flag=3=referring period missing

This report is issued by the Survey Research Center at the University of Michigan to the Social Security Administration in fulfillment of Task 6, "Final Documentation of Imputation Procedures", under contract 600-93-8905, "Longitudinal Imputations for Validating Missing Data Within the Social Security Administration's New Beneficiary Followup Survey." This final report to the Social Security Administration documents the imputation procedures used to compensate for selected item missing data in the New Beneficiary Survey (NBS) and the New Beneficiary Followup Survey (NBF) and provides details of the imputation outcomes.

The New Beneficiary Survey (NBS), conducted in 1982, interviewed a sample of 18,599 persons who had begun receiving retirement or disability benefits under the Social Security program between mid-1980 and mid-1981, or who were aged 65 and had not retired by late 1982. The 1991 New Beneficiary Followup Survey (NBF) was conducted in 1992 and reinterviewed 13,962 NBS respondents or their surviving spouses. The imputation of missing data for cases not reinterviewed in the NBF were not part of this workscope.

Under separate contract, item missing data for selected employment, asset, and income items were independently imputed in the NBS and NBF using cross-sectional information and data from the Master Beneficiary Record file in which information from one wave was not used to prepare imputations for missing items in the alternative wave. Under this contract, the cross-sectional imputations for selected asset and income items in the NBS and NBF were reexamined using the full range of information available from the two surveys to create longitudinally-based imputations.

The work performed by the research team at the Survey Research Center involved: 1) data management activities associated with identifying cases interviewed in both waves and creating analysis variables, including indicators of item missing data; 2) examining cross-wave response patterns for 19 asset items and 19 income items; and 3) arraying cross-wave response patterns by variables judged to be important in estimating longitudinal imputations; 4) development of imputation procedures; 5) implementation of imputation procedures; and 6) documentation of imputation procedures.

1.1 Purpose of Report

The purpose of this report is to describe the methods of imputation used to compensate for item missing data for selected asset and income items in the New Beneficiary and the New Beneficiary Followup Surveys and to provide details of the imputation outcomes. Cross-sectional imputations, which were prepared using information from a single wave, while suitable for calculating point-in-time estimates, are generally not designed for estimating changes over time. The availability of nonmissing information in one wave, which may be highly correlated with an item to be imputed in the alternative wave, provided information to improve the quality of imputations for item missing data for purposes of longitudinal analysis.

The principal premise underlying the longitudinal imputation strategy was that nonmissing information for an asset or income item in one wave would be useful in the imputation of a missing item in the alternative wave, especially with respect to subsequent longitudinal analyses of the data. When the utility of the alternative wave information for imputing a particular item could be established empirically, the alternative wave information was incorporated into the imputation procedure. Other imputation and editing procedures were used in instances in which the predictive power of an alternative wave item proved to be minimal or information in one or both waves were missing. This report describes those procedures as well.

1.2Guiding Principles for Longitudinal Imputation in the NBS and NBF

There were several principles which defined the scope of the work and guided the evaluation of compensation strategies for item missing data in the NBS and NBF. These principles addressed issues regarding how the longitudinal data were to be used; the desirability for compensation strategies to address a broad range of longitudinal analytical goals; the central role of identifying subgroups and other covariates to improve the quality of longitudinal imputation; statistical considerations of variance and bias of estimates; and other considerations such as costs and efficiency. The principles are delineated in the following sections.

1.2.1 Emphasis on Longitudinal Analysis of the Economic Circumstances of Sample

Persons

The NBF was designed with an explicit emphasis on measuring changes over time in the relationship between income and assets and the circumstances of sample persons' situations. Imputation procedures were identified with this analytical goal in mind while attempting to utilize the full range of information available about sample persons.

1.2.2 Analytical Usefulness of Distinct Subgroups

An overarching component of all imputation methods was an assessment of whether the imputation procedures should be separately specified for various subgroups. As such, each imputation procedure included an explicit evaluation of subgroups. Subgroups included, but were not limited to, gender, the Medicare only and disability population at Wave 1, widowhood and other changes in marital status, institutionalization, asset liquidation such as primary home, and other events or characteristics affecting economic circumstances.

1.2.3 Auxiliary Information

There was much auxiliary information which had the potential to inform the longitudinal imputation work, and this information was used often in models as covariates in statistical models or used to edit missing responses. The administrative data, for example, was a source of program participation and benefit information for Social Security and Supplemental Social Security. Similarly, the NBF data contained many items designed specifically to measure changes in people's economic situation over the ten-year period between interviews. These and other auxiliary data were used to improve the quality of longitudinal imputations whenever possible.

1.2.4 Specific Versus General Nature of Compensation Strategies

The NBS and NBF longitudinal files will be used for a variety of analytical purposes and no one imputation procedure is likely to be ideal for all longitudinal estimation problems. The general aim of the imputation work was to provide an imputed longitudinal data set which yielded reasonable estimates for a variety of longitudinal estimation problems. For any given analysis problem, however, specific analytic techniques tailored to item missing data problems (e.g., use of the E-M algorithm for generating maximum likelihood estimates) would almost always outperform the conventional analytic approach using the imputed data. This limitation must be recognized for all public use imputed data sets.

1.2.5 Reducing Nonresponse Bias of Univariate and Multivariate Estimates

The goal of imputation is to reduce the item nonresponse bias component of the mean square error of survey statistics generated from data subject to missing information. Compensation strategies for item missing data can reduce the bias component of the mean square error only to the extent that the assumptions of the imputation model are correct. In general, the imputation procedures incorporated strategies designed to reduce item nonresponse bias for longitudinal univariate analyses (e.g., between-wave changes in mean values, medians, estimates of dispersion, etc.), as well as longitudinal multivariate analyses (e.g., correlates of change over time, modelling changes in aggregate assets and income between waves, etc.). This goal was supported by using:

\*alternative wave information for imputation (to reduce bias associated with estimates of between wave changes);

\*stochastic imputation methods, as opposed to deterministic methods (to preserve the distributional features of the data); and,

\*a sequential method of imputing items, including the previously imputed items as predictors of successive items (to preserve to some extent the partial correlation structure of the data set).

1.2.6 Costs and Efficiency Considerations

The cost and efficiency associated with developing and implementing an imputation procedure were considered before a final imputation procedure was selected. Imputation problems characterized by items with few missing cases or instances in which alternative wave information was not available or shown to be inconsequential did not warrant or require the extensive evaluations which preceded the imputation of items with higher rates of item missing data. Some imputation procedures, while technically appropriate, were occasionally deemed to be operationally inadvisable, such as multiple imputation methodologies. Underlying the evaluation of all imputation problems was the need to perform them in a timely manner.

1.3Issues Related to the Development of an Imputation Strategy

This section of the report discusses issues associated with the development of imputations for the NBS/NBF longitudinal file. Some issues had general applicability while others were unique to the NBS and NBF, such as the ten-year time period between waves of data collection. The issues discussed below are organized into common topic areas. The nature of each issue is described and the manner in which the imputation work proceeded is presented.

1.3.1Single Versus Multiple Imputations in a Data Set

All imputation procedures involving single imputations generate statistical estimates whose precision is overstated using conventional estimates of variance because the component of variance attributable to the imputation procedure typically is not estimated. Multiple imputation procedures offer a means of estimating the variance due to the imputation methodology by providing more than one imputed value for a missing item. Variance estimates which include the component of variance due to imputation allow more precise inferences to be drawn.

Data sets which provide more than one imputed value for a missing item have a distinct disadvantage, however. In reality, most analysts will be unwilling or unable to estimate the component of variance due to imputation. Given the technical limitations associated with multiply imputed data sets at this time, our approach was to provide a single imputation for each missing item. This approach was consistent with the methods used to cross sectionally impute missing items in the NBS and NBF.

1.3.2Sequencing of Imputations

Asset and income items defined two distinct groups of variables which required imputation. The order in which items were to be imputed was important to consider because the first set of imputed items provided valuable covariate information for subsequent items requiring imputation.

The usual approach to sequencing was to perform asset imputations before performing income imputations, and to use information about assets as covariates for imputing income items whenever possible. In general, items imputed in previous stages were made available as potential covariates in subsequent imputation stages. Missing asset holding indicators were imputed before missing asset amounts were imputed. Missing asset income items were imputed after missing asset amounts were imputed. Similarly, missing income receipt indicators were imputed before missing income amounts were imputed. Within these sets of items, sequencing was also used.

1.3.3Defining Imputation Problems

An **imputation problem** was represented by missing values to be replaced with nonmissing values using a common compensation strategy or model. The choice of model depended on the properties of the variables of interest and the relationship between these variables and a vector of known covariates. As mentioned previously, the vector of covariates specifically included items which defined substantively important subgroups, such as items which define variations in people's economic circumstances or sociodemographic status. An assumption underlying most of the imputation approaches was that missing data were missing at random . This means that, conditional on the covariates used in an imputation model, the missing data were assumed to result from a random sampling mechanism.

Imputation problems were defined in a number of ways: according to substantive similarity among variables (e.g., assets versus income items; low versus high rates of holdings/recipiency), by rates and patterns of missing data, and by the availability of

alternative wave information or covariates with nonmissing values. In some instances, an imputation problem was defined using more than one of these properties.

The most common imputation problem was defined by items missing in one but not both waves. A far less common imputation problem occurred when an item was missing in both waves. This later imputation problem nevertheless warranted special consideration.

1.3.4 A General Imputation Problem Defined by Missing Data in Both Waves

Items missing in both waves defined a unique imputation problem which warranted special consideration because the use of nonmissing information from one wave to impute a value for missing data in the alternative wave was not feasible. There were two approaches which could be taken to impute items which were missing in both waves. The first approach was to do nothing longitudinally and retain the cross-sectional imputations in the longitudinal file. An alternative to retaining the cross-sectional imputations was to declare one of the cross-sectional imputations as valid and to longitudinally impute the missing item in the alternative wave. Our approach for imputing items missing in both waves was to declare the Wave 1 (NBS) cross-sectional imputation as valid and to proceed as if the Wave 1 item was nonmissing. The advantage of this approach was that better consistency between waves was achieved.

1.3.5 Deterministic Versus Statistical Imputations

A distinction was made between two general classes of imputations: logical and statistical. Logical, or deductive imputation, was preferred over statistical imputation and was implemented when missing items could be reasonably inferred from nonmissing items within the same record or from auxiliary information such as administrative data.

Several logical or deductive edits were possible and included Social Security and Supplemental Security Income recipiency, earnings from a job indicators, and indicators of income recipiency from various public and private pensions. Changes in marital status were always assessed to ensure that information in the administrative record, when it was used, pertained to the person whose recipiency was edited. Some edits were straightforward, such as missing Social Security recipiency, while others were conditioned on one or more other variables.

1.3.6 Ten-Year Time Period Between Waves of Data Collection

During the ten-year period between waves of data collection a number of life events may have affected the circumstances of sample persons and their patterns of asset holdings and sources of income. Identifying these circumstances and explicitly incorporating them into the model building and evaluation activities was an important aspect of the longitudinal imputation work. Mortality during the ten-year period was high among original sample persons and their spouses. Both widowhood and remarriage were associated with changes in assets and income. Many respondents employed in Wave 1 were not receiving Social Security benefits at that time, possibly due to their high earnings (e.g., the Medicare only group), but by 1991 they had retired and were receiving Social Security benefits. Other persons may have been institutionalized and liquidated some of their assets such as their primary residence. Deterioration in health and episodes of hospitalization could also deplete assets.

Changes in patterns of assets and income brought about by these life events and how they affected the imputation approach were examined closely. Emphasis was always placed on the importance of explicitly incorporating subgroups into the imputation procedures either directly as covariates or as subgroups in which models were estimated separately.

1.4Variables Subject to Imputation

Tables 1 and 2 provide an overview of the items which were subject to imputation. Table 1 outlines asset holding, asset amount, and income from asset items. Table 2 lists the income receipt and income amount variables subject to imputation. Some components of an item are noted as not

imputed because the component was not asked or not relevant (e.g., asset amounts for roomers and boarders). The set of imputed asset items included 19 holding indicators, 13 amount items which measured the equity or market value of the asset, and 19 asset income items which measured income from the asset or debt owed on the asset (e.g., mortgage and loan repayment debt). The set of imputed income items included 20 indicators of income recipiency and 17 income amounts. [[2]](#footnote-2)

1.5Report Structure

The structure of the remaining sections in the report generally follows the order in which the imputations were performed. Section 2 outlines the imputation approach for asset holding items. Methods of imputation for asset amounts are discussed in Section 3 followed by a discussion of imputation methods for income from asset amounts in Section 4. Imputation of missing income recipiency items in the NBS and NBF is discussed in Section 5. Section 6 outlines methods of imputation for income amount items.

**2. Imputation Procedures for Missing Asset Holdings**

A listing of the nineteen asset holding variables subject to imputation and a brief description of the procedures used to compensate for item nonresponse in the NBS and NBF are shown in Table 3. Tables 4 and 5 contain the frequency distribution of reported values for each asset holding variable, the number of missing values, and the imputation outcomes for the NBS and NBF, respectively. Three imputation methods were used to compensate for missing asset holding items: a Gibbs iterative estimation algorithm, multinomial logistic regression, and logistic regression for dichotomous dependent variables. Each of these three procedures incorporated information about the asset holding status in the alternative wave. In addition, the Gibbs iterative estimation algorithm and the multinomial logistic regression procedure attempted to preserve the intercorrelational structure among groups of related assets. Each of the three procedures is described below.

2.1Money Market Accounts, Certificates of Deposit, Savings/Credit Union Accounts, and Checking Accounts

The Gibbs iterative estimation algorithm was implemented separately for two groups of asset holding variable. Money market accounts and certificates of deposit comprised one group and savings/credit union accounts and checking accounts comprised the second group.[[3]](#footnote-3) Money market accounts and certificates of deposit are used as examples in describing the imputation procedure. The same steps were implemented for savings/credit union accounts and checking accounts.

The first step in the imputation procedure consisted of sequentially fitting four logistic regression models where NBS money market accounts, NBF money market accounts, NBS certificates of deposit, and NBF certificates of deposit were the dependent variables. The first model regressed NBF money market accounts, NBS certificates of deposit, NBF certificates of deposit and other covariates (the independent variables) on NBS money market accounts (the dependent variable). The other covariates, all of which were nonmissing, are outlined in Table 6. Cases with missing values on any of the three asset holding variables appearing as independent variables were assigned the value of the sample mean as starting values. The parameters estimated from the first logistic regression model were subsequently used to predict the probability of holding a money market account in the NBS. The predicted probability for each case initially assigned a sample mean value was compared to a random number generated from a uniform (0,1) distribution. If the value of the random number was greater than the predicted probability of having a NBS money market account, missing NBS money market account indicators were imputed "no"; otherwise, missing NBS money market account indicators were imputed "yes."

The second model estimated regressed NBS money market accounts, NBS certificates of deposit, NBF certificates of deposit and other covariates on NBF money market accounts. As in the first model estimated, the parameters estimated were used to predict the probability of holding a money market account in the NBF. The predicted probability for each case initially assigned a sample mean value was compared to a random number generated from a uniform (0,1) distribution. If the value of the random number was greater than the predicted probability of having a NBF money market account, missing NBF money market account indicators were imputed "no"; otherwise, missing NBF money market account indicators were imputed "yes." The third and fourth models estimated were used to impute missing holding indicators for NBS certificates of deposit and NBF certificates of deposit, respectively, using the same procedure.

The imputed NBS money market account indicators generated from the first logistic regression model replaced the sample mean value used as starting estimates and were retained in the three subsequent logistic regression model in which NBS money market account indicators appeared as independent variables in model. Imputed NBF money market account indicators were also retained in the two subsequent logistic regression models in which they appeared as independent variables. Likewise, imputed NBS certificate of deposit indicators were retained in the fourth logistic regression model estimated. This series of four logistic regression models in which a missing asset holding indicator was first imputed and subsequently used as a regressor constituted the first step in the Gibbs iterative estimation algorithm.

The set of four logistic regression models which comprised the first step was subsequently repeated fifty times. Imputed asset holding indicators resulting from the fiftieth iteration were used as starting estimates for the first of another fifty iterations, which comprised the second step in the imputation procedure. The predicted probabilities from the second fifty iterations for each missing case were averaged, and the average probability was compared to a random number generated from a uniform (0,1) distribution. The final imputed value for each missing case among these four asset holding indicators was set to "no" if the average predicted probability was greater than the random number and "yes" otherwise.[[4]](#footnote-4) The purpose of the first fifty iterations was to wash out the effects of the initial starting values (the sample means), while the purpose of the second set of fifty iterations was to average out the random component of the estimates resulting from each iteration. These two sets of iterations resulting in imputed values for each missing asset holding indicator were repeated for missing savings/credit union accounts and checking accounts.

2.2Bonds, Stocks, and Mutual Funds

Missing asset holding indicators for NBS and NBF bonds, stocks, and mutual funds were imputed using a multinomial logistic regression procedure.[[5]](#footnote-5) The multinomial logistic regression model for dependent variables with more than 2 categories is the general form of the logistic model for binary dependent variables. The dependent variable was modeled as a pattern variable where each level represented an asset holding pattern for NBS stocks, NBF stocks, NBS bonds, and NBF bonds. For example, the pattern "1010", corresponding to the order NBS stocks, NBF stocks, NBS bonds, and NBF bonds, indicated bonds and stocks were held in the NBS but not the NBF. Sixteen holding patterns were possible among the four asset holding variables.

The multinomial logistic model was estimated first for all cases where the vector of asset holdings was nonmissing in both waves. The set of covariates included in the model are shown in Table 6. Estimates of the intercept and slope parameters were then used to predict the probability of each of the sixteen possible holding pattern for each missing case. Each missing case was imputed the holding pattern having the highest probability. The nonmissing information in each asset holding pattern in which one or more components was missing was retained by limiting the choices of an imputed pattern to those which were feasible.

2.3 All Other Asset Holding Indicators[[6]](#footnote-6)

All other missing asset holding indicators were imputed using logistic regression. The linear logistic regression models were specified as follows:

**logit (p) = α + β'χ** ;

where **α** was the intercept parameter, and **β'**was the vector of parameter estimates. Each model contained the two best predictors selected in a stepwise procedure from a pool of potential covariates. The pool of potential covariates included the asset holding status in the alternative wave and a group of sociodemographic predictors. The first covariate selected in every model was the asset holding status in the alternative wave. The second covariate selected into a model varied by type of asset. The covariates which comprised each model are shown in Table 6.

Each logistic model was estimated in two forms using cases in which the asset holding status was nonmissing in both waves: one model predicted the probability of holding the asset in Wave 2 from the Wave 1 response, and the other model predicted the probability of holding the asset in Wave 1 from the Wave 2 response. Estimates of the intercept and slope parameters were subsequently used to predict the probability of holding the asset in a missing wave. A stochastic element was introduced by generating a random number between 0 and 1 which was compared to the predicted probability for each missing case. If the value of the random number was greater than the predicted probability of holding the asset, the missing asset holding item was imputed "no"; otherwise, the missing income recipiency item was imputed "yes." Asset holding variables subject to imputation, patterns of reported data, number of missing cases, and the imputation outcomes are contained in Tables 4 and 5.

Missing asset holding indicators for IRA (spouse) and life insurance (spouse) were imputed based on models estimated separately for persons married in both the NBS and NBF, married in the NBS only, and married in the NBF only. The models varied according to whether information about the respondent's holding status for the same asset was present in the model as a covariate. The covariates which comprised each model are shown in Table 6.

**3. Imputation Procedures for Missing Income Receipts**

Table 7 displays the nineteen income recipiency variables subject to imputation and provides a synopsis of the procedures used to compensate for item nonresponse in the NBS and NBF. Tables 8 and 9 contain the frequency distribution of reported values for each income recipiency variable, the number of missing values, and the imputation outcomes for the NBS and NBF, respectively. Two general imputation methods were used to compensate for missing income receipt items: deductive or logical imputation and logistic regression. Deductive methods were used when a missing item could be reasonably inferred from information in the administrative record, other reported data, or when it was believed that income recipiency status in one wave determined income recipiency status in the alternative missing wave. Logistic regression was used to model recipiency in one wave conditional on recipiency status in the alternative wave and other covariates.

Spouse and Proxy Status: implications for edits

3.1 Social Security Recipiency

Cases with missing NBS Social Security recipiency were imputed using the NBS cross sectionally edited values. Missing NBS Social Security recipiency was edited based on the value of the sample person subdomain variable, "Medicare-Only" status as follows: recipiency was imputed "no" if the sample person subdomain was "Medicare-Only", indicating that the sample person was not receiving Social Security benefits just prior to being interviewed in the NBS; otherwise, missing NBS Social Security recipiency was imputed "yes."

A similar procedure was used to edit missing NBF Social Security recipiency. Missing NBF Social Security recipiency was edited based on the values of variable "RLAF91" number 105 in the Administrative data file indicating payment status as of Dec. 1991. Missing Social Security recipiency was coded "yes" if the value of variable "RLAF91" was 22 or 32, indicating paid beneficiaries as of the end of 1991, and "no" otherwise. Because some respondents may have died after being interviewed in the NBF but before the end of 1991, in which case the LAF code would not be 22 or 32 even though the respondent may have been receiving Social Security benefits at the time of interview, the date of death field was also checked before a final edit was made.

3.2 Supplemental Social Security Recipiency

Missing Supplemental Social Security recipiency in one or both waves was edited using data from the Administrative file as well. Missing NBS Supplemental Social Security recipiency was coded "yes" if the value of variable "311" (pay status as of 12/82) was 101 and "0" otherwise. Similarly, missing NBF Supplemental Social Security recipiency was coded "yes" if the value of variable "310" (pay status as of 12/91) was 101 and "0" otherwise. As in the case of missing Social Security recipiency, a check was made of the date of death to identify missing cases who died between the date of interview and the end of 1991.

3.3Railroad Retirement, Black Lung Benefits, Military/Reserve Pension, Federal Employee Pension, and Private Employer/Union Pension

Missing indicators of income recipiency from Railroad Retirement, Black Lung Benefits, Military/Reserve Pension, Federal Employee Pension, and Private Employer/Union Pension were both edited and modeled using logistic regression. The editing routine was based on the premise that once a respondent began to receive income from one of these sources that source of income would continue. Missing NBF recipiency status for these income sources, with the exception of private employer/union trust, was edited as "yes" if sample persons reported receiving the income source in the NBS. Likewise, missing NBS recipiency status for these income sources was edited as "no" if sample persons did not report receiving the income source in the NBF. An additional criterion was included in the editing routine for missing NBF private employer/union pension recipiency. Missing NBF recipiency was edited as "yes" if the sample person reported receiving income from a private employer/union pension in the NBS and there was no indication in the NBF that a private employer/union pension had been terminated since the NBS. If the sample person reported that a private employer/union pension had been terminated, missing NBF recipiency was edited as "no." Missing recipiency in all other instances was imputed using logistic regression.

3.4Earnings from a Job

Missing indicators of earnings from a job were edited from recent labor force activity and from information obtained from the Administrative file. The decision to edit missing earnings indicators was made after an analysis was conducted to assess the usefulness of a longitudinal imputation approach. That analysis showed that the alternative wave information was not as useful as other employment information available about respondents and their spouses.

Ask Ben if receipt of pension income was considered in editing missing NBS earnings indicators

Missing NBS indicators of earnings from a job were edited from Question 17 for respondents and Question S17 for spouses, both of which asked about current employment. If either Question 17 or S17 was "yes" then missing NBS indicators of earnings from a job were edited as "yes." If both Questions 17 and S17 were "no" or "don't know" then a check was made in the Administrative file for nonzero earnings from wage and salary or self employment in 1982. If either the respondent or his/her spouse had salary, wage, or self employment income subject to Social Security taxes in 1982, then missing NBS indicators of earnings from a job were edited as "yes"; otherwise, missing NBS earnings from a job indicators were edited as "no."

A similar procedure was used to edit missing NBF indicators of earnings from a job. Question 18 asked if respondents ever worked since 1982, Question 19a asked if respondents worked anytime during 1991, and Question 23 asked if respondents were currently working. Spouses were also asked if they ever worked since 1982 (Question 288) or during 1991 (Question 289a), but not if they were currently working. Salary, wage, or self employment income subject to Social Security taxes in 1991 were available in the Administrative file for respondents and their spouses to whom they were married in the NBS. Information about spouses from subsequent marriages was not available in the administrative file, however.

Missing NBF earnings indicators were edited as "yes" if respondents were currently working or their spouses had worked in 1991. Missing earnings indicators were edited as "no" if both respondents and spouses, if married, said they had not worked since 1982. If either respondent or spouse worked since 1982 but the respondent was not currently working and the spouse had not worked in 1991, missing NBF indicators of earnings from a job were edited as "no" also. Information in the Administrative file regarding earnings subject to Social Security taxes was used to edit missing earnings indicators only when question 18,19a, 23, 288, or 289a could not determine respondent or spouse employment situation. In these instances missing earnings indicators were edited as "yes" if earnings subject to Social Security taxes were reported for 1991 and "no" otherwise.

3.5Veteran's Benefits, State/Local Welfare, Annuities, Worker's Compensation, Unemployment Compensation, Alimony/Child Support, Estate/Trust Payments and Royalties, Intrahousehold Transfers, Interhousehold Transfers, Food Stamps

Missing recipiency status in the NBS and NBF for each of these income sources was imputed using the logistic regression procedure outlined below. The linear logistic regression models were specified as follows:

**logit (p) = α + β'χ** ;

where **α** was the intercept parameter, and **β'**was the vector of parameter estimates. Each model contained the two best predictors selected in a stepwise procedure from a pool of potential covariates. The pool of potential covariates included income recipiency from the alternative wave and a group of sociodemographic predictors. The first covariate selected in every model was income recipiency in the alternative wave. The second covariate selected into a model varied by type of income recipiency. The covariates which comprised each model are shown in Table 10.

Each logistic model was estimated in two forms using cases with nonmissing income recipiency in both waves: one model predicted the probability of receiving the income in Wave 2 from the Wave 1 response, and the other model predicted the probability of receiving the income in Wave 1 from the Wave 2 response. Estimates of the intercept and slope parameters were subsequently used to predict the probability of receiving the income in a missing wave. A stochastic element was introduced by generating a random number between 0 and 1 and comparing it to the predicted probability for each missing case. If the value of the random number was greater than the predicted probability of receiving the income, the missing income recipiency item was imputed "no"; otherwise, the missing income recipiency item was imputed "yes." This approach was both simple and efficient and incorporated a stochastic component into the imputed value. The income recipiency variables subject to imputation, patterns of reported data, number of missing cases, and the imputation outcomes are contained in Tables 8 and 9.

3.6Other Pension Income Recipiency

In addition to questions about state and local government pensions, military or reserve pensions, federal employee pensions, and private employer or union pensions, the NBF, but not the NBS, included items which measured income from "other" pensions. This section describes the procedure used to impute "other" pension recipiency in the NBF.

"Other" pension recipiency was imputed using logistic regression. Before the logistic regression procedure was implemented the association between "other" pension recipiency and income recipiency for earnings, including the indicator of a loss, the specific pension types mentioned above and assets such as interest in a business, professional practice or farm were investigated. "Other" pension recipiency was expected to be associated with these variables under the assumption that "other" pension recipiency was associated with self employment, either as an individual or configured as a partnership. In each instance, however, there was no evidence of an association between these variables and "other" pension recipiency.

The association between "other" pension recipiency and several other variables noted below was also investigated. Unlike all other income recipiency items, an indicator of "other" pension recipiency was not measured in the NBS; therefore, the alternative wave recipiency status for this variable was not available as a covariate. The set of potential covariates included in the model building step were as follows:

\*Respondent gender

\*Respondent education

\*Respondent race

\*Disability status

\*Medicare-only status

\*Change in marital status between NBS and NBF

\*Proxy reporting status in NBS

\*NBS home ownership

\*NBS Social Security recipiency

\*Indicators of self employment:

NBS earnings from a job was negative

NBS interest in a business

NBS interest in a professional practice

NBS interest in a farm

There were 208 observed cases of "other" pension recipiency in the NBF, 13,479 observed cases of not receiving "other" pension income, and 275 cases where "other" pension recipiency was missing. The final logistic regression model included education, medicare-only status, and race; no other variables were statistically significant. Recipiency was imputed by comparing the predicted probability to a random number between 0 and 1. If the value of the random number was greater than the predicted probability, the missing case was imputed "no"; otherwise the missing cases was imputed "yes." All 275 missing cases were predicted as not receiving "other" pension income. The overall rate of "other" pension recipiency was 1.52 percent, and the predicted probabilities of receiving income from an "other" pension varied across subgroups. For example, the predicted probability of receiving "other" pension income among the medicare-only group while holding all other variables in the model at their sample means was the highest at 2.4 percent, compared to the lowest value of 0.71 percent among nonwhite respondents. Although the predicted probabilities varied across subgroups, the recipiency rates were too low to impute any cases as receiving income from "other" pensions.

**4. Imputation Procedures for Missing "Who" Receives Income**

Not available in June 28, 1996, draft.

**5. Imputation Procedures for Missing Asset Amount**

Not available in June 28, 1996, draft.

**6. Imputation Procedures for Missing Income from Asset Amounts**

Not available in June 1928, 1996, draft

**7. Imputation Procedures for Missing Income Amounts**

Not available in June 1928, 1996, draft

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| **Table 1: Asset Items Subject to Longitudinal Imputation in the NBS and NBF** | | | | | | |
|  | Asset Holdings | | Asset Amounts | | Income from Assets | |
| Asset Variable: | NBS | NBF | NBS | NBF | NBS | NBF |
| Money Market Accounts | \_ | \_ | \_ | \_ | \_ | \_ |
| Certificates of Deposit | \_ | \_ | \_ | \_ | \_ | \_ |
| Savings/Credit Union Accounts[[7]](#footnote-7) | \_ | \_ | \_ | \_ | \_ | \_ |
| Checking Accounts[[8]](#footnote-8) | \_ | \_ | \_ | \_ | \_ | \_ |
| Bonds[[9]](#footnote-9) | \_ | \_ | \_ | \_ | \_ | \_ |
| Stocks and Mutual Funds[[10]](#footnote-10) | \_ | \_ | \_ | \_ | \_ | \_ |
| IRA/KEOGH (Respondent) | \_ | \_ | \_ | \_ | \_ | \_ |
| IRA/KEOGH (Spouse) | \_ | \_ | \_ | \_ | \_ | \_ |
| Own or Buying Home | \_ | \_ | \_ | \_ | \_ | \_ |
| Business Equity | \_ | \_ | \_ | \_ | - | - |
| Professional Practice Equity | \_ | \_ | \_ | \_ | - | - |
| Farm Equity | \_ | \_ | \_ | \_ | - | - |
| Properties[[11]](#footnote-11) | \_ | \_ | \_ | \_ | \_ | \_ |
| Other Income | \_ | \_ | - | - | \_ | \_ |
| Roomers and Boarders | \_ | \_ | - | - | \_ | \_ |
| Loan Repayment | \_ | \_ | - | - | \_ | \_ |
| Life Insurance (Respondent) | \_ | \_ | - | - | - | - |
| Life Insurance (Spouse) | \_ | \_ | - | - | - | - |
| Vehicles | \_ | \_ | - | - | - | - |

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| **Table 2: Income Items Subject to Longitudinal Imputation in the NBS and NBF** | | | | |
|  | Income Receipts | | Income Amounts | |
| Income Variable: | NBS | NBF | NBS | NBF |
| Social Security | \_ | \_ | \_ | \_ |
| Supplemental Security Income |  | \_ | \_ | \_ |
| Railroad Retirement | \_ | \_ | \_ | \_ |
| Black Lung Benefits | \_ | \_ | \_ | \_ |
| Veteran's Benefits | \_ | \_ | \_ | \_ |
| State/Local Welfare | \_ | \_ | \_ | \_ |
| Earnings from Job | \_ | \_ | \_ | \_ |
| State/Local Government Pension | \_ | \_ | \_ | \_ |
| Military/Reserve Pension | \_ | \_ | \_ | \_ |
| Federal Employee Pension | \_ | \_ | \_ | \_ |
| Private Employer/Union Pension | \_ | \_ | \_ | \_ |
| Annuities | \_ | \_ | \_ | \_ |
| Worker's Compensation | \_ | \_ | \_ | \_ |
| Unemployment Compensation | \_ | \_ | \_ | \_ |
| Alimony/Child Support | \_ | \_ | \_ | \_ |
| Estate/Trust Payment, Royalties | \_ | \_ | \_ | \_ |
| Intrahousehold Transfers | \_ | \_ | \_ | \_ |
| Interhousehold Transfers | \_ | \_ | \_ | \_ |
| Food Stamps | \_ | \_ | \_ | \_ |
| Other Pensions | ---- | \_ | ---- | \_ |

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| **Table 3**  **Imputation Procedures Used to Compensate for Missing Asset Holding**  **Data in the New Beneficiary and New Beneficiary Followup Surveys** | | |
|  | Imputation Procedure | |
| Asset Holding Variable: | New Beneficiary Survey | New Beneficiary Followup Survey |
| Account Assets:  Money Market Accounts  Certificates of Deposit | Iterative Gibbs Estimation Algorithm | Iterative Gibbs Estimation Algorithm |
| Savings and Credit Union Accounts  Checking Account | Iterative Gibbs Estimation Algorithm | Iterative Gibbs Estimation Algorithm |
| Bonds | Multinomial Logistic Regression | Multinomial Logistic Regression |
| Stocks | Multinomial Logistic Regression | Multinomial Logistic Regression |
| IRA (Respondent) | Logistic Regression | Logistic Regression |
| IRA (Spouse) | Logistic Regression | Logistic Regression |
| Own or Buying Home | Logistic Regression | Logistic Regression |
| Business Equity | Logistic Regression | Logistic Regression |
| Professional Practice Equity | Logistic Regression | Logistic Regression |
| Farm Equity | Logistic Regression | Logistic Regression |
| Properties | Logistic Regression | Logistic Regression |
| Other Income | Logistic Regression | Logistic Regression |
| Roomers and Boarders | Logistic Regression | Logistic Regression |
| Loan Repayment | Logistic Regression | Logistic Regression |
| Life Insurance (Respondent) | Logistic Regression | Logistic Regression |
| Life Insurance (Spouse) | Logistic Regression | Logistic Regression |
| Vehicles | Logistic Regression | Logistic Regression |

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| **Table 4**  **Reported, Missing, and Imputed Values for NBS Asset Holdings** | | | | | | | |
|  | Reported Values | | Missing  Values | Longitudinally  Imputed Values | | Cross Sectionally Imputed  Values Retained | |
| Asset Holding Variable: | Yes | No |  | Yes | No | Yes | No |
| Money Market Accounts | 3,149 | 10,275 | 538 | 147 | 391 | 0 | 0 |
| Certificates of Deposit | 4,012 | 9,370 | 580 | 213 | 367 | 0 | 0 |
| Savings & Credit Union Accounts | 8,548 | 4,855 | 559 | 364 | 195 | 0 | 0 |
| Checking Account | 10,450 | 2,991 | 521 | 416 | 105 | 0 | 0 |
| Bonds | 2,046 | 11,686 | 230 | 44 | 186 | 0 | 0 |
| Stocks | 2,233 | 11,485 | 244 | 59 | 185 | 0 | 0 |
| IRA (Respondent) | 1,600 | 12,269 | 93 | 14 | 74 | 2 | 3 |
| IRA (Spouse) | 978 | 12,886 | 98 | 15 | 75 | 1 | 7 |
| Own or Buying Home | 10,696 | 3,220 | 46 | 36 | 9 | 0 | 1 |
| Business Equity | 946 | 12,960 | 56 | 7 | 48 | 0 | 1 |
| Professional Practice Equity | 215 | 13,684 | 63 | 2 | 61 | 0 | 0 |
| Farm Equity | 715 | 13,186 | 61 | 4 | 57 | 0 | 0 |
| Properties | 1,684 | 12,210 | 68 | 10 | 58 | 0 | 0 |
| Other Income | 832 | 13,005 | 125 | 8 | 106 | 1 | 10 |
| Roomers and Boarders | 180 | 13,751 | 31 | 2 | 29 | 0 | 0 |
| Loan Repayment | 637 | 13,245 | 80 | 3 | 74 | 1 | 2 |
| Life Insurance (Respondent) | 9,869 | 3,988 | 101 | 67 | 38 | 0 | 0 |
| Life Insurance (Spouse) | 6,958 | 6,835 | 160 | 122 | 47 | 0 | 0 |
| Vehicles | 6,958 | 6,835 | 160 | 117 | 44 | 0 | 0 |

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| **Table 5**  **Reported, Missing, and Imputed Values for NBF Asset Holdings** | | | | | |
|  | Reported Values | | Missing  Values | Longitudinally  Imputed Values | |
| Asset Holding Variable: | Yes | No |  | Yes | No |
| Money Market Accounts | 3,325 | 10,300 | 337 | 97 | 240 |
| Certificates of Deposit | 4,957 | 8,653 | 352 | 156 | 196 |
| Savings and Credit Union Accounts | 5,951 | 7,663 | 348 | 173 | 175 |
| Checking Account | 11,307 | 2,405 | 250 | 219 | 31 |
| Bonds | 2,206 | 11,582 | 174 | 38 | 136 |
| Stocks | 3,116 | 10,645 | 201 | 57 | 144 |
| IRA (Respondent) | 1,853 | 11,990 | 119 | 30 | 89 |
| IRA (Spouse) | 1,198 | 12,658 | 106 | 29 | 77 |
| Own or Buying Home | 10,148 | 3,765 | 49 | 39 | 10 |
| Business Equity | 510 | 13,375 | 77 | 4 | 73 |
| Professional Practice Equity | 78 | 13,807 | 77 | 3 | 77 |
| Farm Equity | 554 | 13,332 | 76 | 5 | 71 |
| Properties | 1,424 | 12,463 | 75 | 4 | 71 |
| Other Income | 278 | 13,409 | 275 | 3 | 272 |
| Roomers and Boarders | 170 | 13,735 | 57 | 1 | 56 |
| Loan Repayment | 726 | 13,141 | 95 | 9 | 86 |
| Life Insurance (Respondent) | 8,717 | 5,128 | 113 | 71 | 46 |
| Life Insurance (Spouse) | 4,322 | 9,470 | 161 | 94 | 76 |
| Vehicles | 11,159 | 2,750 | 52 | 45 | 8 |

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| --- | --- | --- | --- | --- |
| **Table 6: Specifications for Models Used to Impute Missing NBS and NBF Asset Holdings** | | | | |
| Asset Account Variables: | Covariates | | | |
| NBS and NBF Money Market Accounts and CD's | NBS and NBF asset holding indicators for money market accounts and CD's; disability status recoded as: 1) disabled, 2) not disabled | | | |
| NBS and NBF Savings/Credit Union and Checking Accounts | NBS and NBF asset holding indicators for money market accounts, CD's, savings/credit union accounts, and checking accounts; race recoded as: 1) black, 2) all others | | | |
| NBS and NBF Bonds and Stocks/Mutual Funds | Respondent education recoded as: 1) high school or more; 2) less than high school | | | |
|  | | | | |
| All Other Asset Holding Variables | Asset Holding Variable Missing in NBS | | Asset Holding Variable Missing in NBF | |
|  | Asset Holding Status in NBF | Additional Covariate | Asset Holding Status in NBS | Additional Covariate |
| IRA/KEOGH (Spouse)  Married both waves  Married in NBS only  Married in NBF only | \_  -  - | NBS IRA (resp.)  NBS IRA (resp.), education  - | \_  -  - | NBF IRA (resp.)  -  NBF IRA (resp.), education |
| Own or Buying Home | \_ | Disability status | \_ | Change in marital status |
| Business Equity | \_ | Medicare-only status | \_ | Education |
| Professional Practice Equity | \_ | Education | \_ | Education |
| Farm Equity | \_ | NBS home ownership | \_ | NBF home ownership |
| Properties | \_ | Education | \_ | NBF home ownership |
| Other Income | \_ | Education | \_ | NBF Home ownership |
| Roomers and Boarders | \_ | Race | \_ | NBF home ownership |
| Loan Repayment | \_ | Education | \_ | Education |
| Life Insurance (Respondent) | \_ | NBS home ownership | \_ | Proxy reporting status in NBF |
| Life Insurance (Spouse)  Married both waves  Married in NBS only  Married in NBF only | \_  -  - | NBS life insurance (resp.)  NBS life insurance (resp.), gender  - | \_  -  - | NBF life insurance (resp.)  -  NBF life insurance (resp.) |
| Vehicles | \_ | NBS home ownership | \_ | NBF home ownership |

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| **Table 7**  **Imputation Procedures Used to Compensate for Missing Income Recipiency**  **Data in the New Beneficiary and New Beneficiary Followup Surveys** | | |
|  | Imputation Procedure | |
| Income Recipiency Variable: | New Beneficiary Survey | New Beneficiary Followup Survey |
| Social Security | Retain NBS Cross Sectional Imputation. | SS pay status as of 12/1991 from Administrative file. |
| Supplemental Security Income | SSI Pay status as of 12/1982 from Administrative file. | SSI Pay status as of 12/1991 from Administrative file. |
| Railroad Retirement | If NBS respondent survived to NBF (RPROX=1,2) and NBF recipiency was "no", edit NBS recipiency as "no"; otherwise, logistic regression (when RPROX=3). | If NBS respondent survived to NBF (RPROX=1,2) and NBS recipiency was "yes", edit NBF recipiency as "yes"; otherwise, logistic regression (when RPROX=3). |
| Black Lung Benefits | If NBS respondent survived to NBF (RPROX=1,2) and NBF recipiency was "no", edit NBS recipiency as "no"; otherwise, logistic regression (when RPROX=3). | If NBS respondent survived to NBF (RPROX=1,2) and NBS recipiency was "yes", edit NBF recipiency as "yes"; otherwise, logistic regression (when RPROX=3). |
| Veteran's Benefits | Logistic regression | Logistic regression |
| State/Local Welfare | Logistic regression | Logistic regression |
| Earnings from Job | Edited | Edited |
| State/Local Government Pension | Logistic regression | If NBS recipiency was "yes" and pension was terminated, edit NBF recipiency as "no"; if pension was not terminated, edit NBF recipiency as "yes"; otherwise logistic regression. |
| Military/Reserve Pension | If NBS respondent survived to NBF (RPROX=1,2) and NBF recipiency was "no", edit NBS recipiency as "no"; otherwise, logistic regression (when RPROX=3). | If NBS respondent survived to NBF (RPROX=1,2) and NBS recipiency was "yes", edit NBF recipiency as "yes"; otherwise, logistic regression (when RPROX=3). |
| Federal Employee Pension | If NBS respondent survived to NBF (RPROX=1,2) and NBF recipiency was "no", edit NBS recipiency as "no"; otherwise, logistic regression (when RPROX=3). | If NBS respondent survived to NBF (RPROX=1,2) and NBS recipiency was "yes", edit NBF recipiency as "yes"; otherwise, logistic regression (when RPROX=3). |
| Private Employer/Union Pension | If NBS respondent survived to NBF (RPROX=1,2) and NBF recipiency was "no", edit NBS recipiency as "no"; otherwise, logistic regression (when RPROX=3). | If NBS recipiency was "yes" and pension was terminated, edit NBF recipiency as "no"; if pension was not terminated, edit NBF recipiency as "yes"; otherwise logistic regression. |
| Annuities | Logistic regression | Logistic regression |
| Worker's Compensation | Logistic regression | Logistic regression |
| Unemployment Compensation | Logistic regression | Logistic regression |
| Alimony/Child Support | Logistic regression | Logistic regression |
| Estate/Trust Payment, Royalties | Logistic regression | Logistic regression |
| Household Transfers | Logistic regression | Logistic regression |
| Interhousehold Transfers | Logistic regression | Logistic regression |
| Food Stamps | Logistic regression | Logistic regression |
| Other Pensions | - - - - | Logistic regression |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Table 8**  **Reported, Missing, and Imputed Values for NBS Income Recipiency** | | | | | | | |
|  | Reported Values | | Missing  Values | Longitudinally  Imputed (Edited) Values | | Cross Sectionally Imputed  Values Retained | |
| Income Recipiency Variable: | Yes | No |  | Yes | No | Yes | No |
| Social Security | 12,725 | 1,207 | 30 | 26 | 4 | 0 | 0 |
| Supplemental Security Income | 439 | 13,475 | 48 | 0 | 48 | 0 | 0 |
| Railroad Retirement | 105 | 13,810 | 47 | 1 | 46 | 0 | 0 |
| Black Lung Benefits | 64 | 13,851 | 47 | 0 | 47 | 0 | 0 |
| Veteran's Benefits | 868 | 13,045 | 49 | 3 | 46 | 0 | 0 |
| State/Local Welfare | 114 | 13,799 | 49 | 0 | 49 | 0 | 0 |
| Earnings from Job  Positive  Negative | 5,867  72 | 7,926 | 97 | 73  0 | 24 | 0 | 0 |
| State/Local Government Pension | 1,283 | 12,629 | 50 | 6 | 43 | 0 | 1 |
| Military/Reserve Pension | 367 | 13,540 | 55 | 7 | 46 | 0 | 2 |
| Federal Employee Pension | 612 | 13,298 | 52 | 3 | 47 | 0 | 2 |
| Private Employer/Union Pension | 4,038 | 9,864 | 60 | 21 | 36 | 2 | 1 |
| Annuities | 574 | 13,316 | 72 | 3 | 68 | 0 | 1 |
| Worker's Compensation | 130 | 13,770 | 62 | 0 | 62 | 0 | 0 |
| Unemployment Compensation | 179 | 13,723 | 60 | 0 | 60 | 0 | 0 |
| Alimony/Child Support | 68 | 13,833 | 61 | 0 | 61 | 0 | 0 |
| Estate/Trust Payment, Royalties | 216 | 13,683 | 63 | 4 | 59 | 0 | 0 |
| Intrahousehold Transfers | 248 | 13,652 | 62 | 2 | 60 | 0 | 0 |
| Interhousehold Transfers | 143 | 13,756 | 63 | 0 | 63 | 0 | 0 |
| Food Stamps | 597 | 13,306 | 59 | 0 | 59 | 0 | 0 |

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Table 9**  **Reported, Missing, and Imputed Values for NBF Income Recipiency** | | | | | | | | | |
|  | | Reported Values | | | Missing  Values | Longitudinally  Imputed (Edited) Values | | | |
| Income Recipiency Variables | | Yes | No | |  | Yes | | No | |
| Social Security | | 13,469 | 455 | | 38 | 35 | | 3 | |
| Supplemental Security Income | | 667 | 13,247 | | 48 | 0 | | 48 | |
| Railroad Retirement | | 109 | 13,811 | | 42 | 0 | | 42 | |
| Black Lung Benefits | | 71 | 13,848 | | 43 | 0 | | 43 | |
| Veteran's Benefits | | 825 | 13,093 | | 44 | 0 | | 44 | |
| State/Local Welfare | | 103 | 13,813 | | 46 | 0 | | 46 | |
| Earnings from Job  Positive  Negative | | 2,630  40 | 11,238 | | 54 | 11  0 | | 43 | |
| State/Local Government Pension | | 1,603 | 12,304 | | 55 | 6 | | 49 | |
| Military/Reserve Pension | | 363 | 13,545 | | 54 | 4 | | 50 | |
| Federal Employee Pension | | 689 | 13,216 | | 57 | 2 | | 55 | |
| Private Employer/Union Pension | | 4,543 | 9,365 | | 54 | 21 | | 33 | |
| Annuities | | 741 | 13,147 | | 74 | 4 | | 70 | |
| Worker's Compensation | | 79 | 13,826 | | 57 | 0 | | 57 | |
| Unemployment Compensation | | 80 | 13,826 | | 56 | 0 | | 56 | |
| Alimony/Child Support | | 49 | 13,858 | | 55 | 0 | | 55 | |
| Estate/Trust Payment, Royalties | | 226 | 13,679 | | 57 | 1 | | 56 | |
| Intrahousehold Transfers | | 185 | 13,719 | | 58 | 1 | | 57 | |
| Interhousehold Transfers | | 193 | 13,707 | | 62 | 0 | | 62 | |
| Food Stamps | | 490 | 13,417 | | 55 | 1 | | 54 | |
| Other Pensions | | 208 | 13,479 | | 275 | 0 | | 275 | |
| **Table 10**  **Specifications of Main Effect Models Used to Impute Missing NBS and NBF Income Recipiency** | | | | | | | | | | |
|  | NBS | | | | | | NBF | | | |
| Income Variable: | NBF Income Recipiency | | | Additional Covariate | | | NBS Income Recipiency | | Additional Covariate | |
| Veteran's Benefits | \_ | | | Marital Status | | | \_ | | Marital Status | |
| State/Local Welfare | \_ | | | Disability Status | | | \_ | | Disability Status | |
| Annuities | \_ | | | Education | | | \_ | | Home Ownership | |
| Worker's Compensation | \_ | | | Disability Status | | | \_ | | Disability Status | |
| Unemployment Compensation | \_ | | | Disability Status | | | \_ | | Disability Status | |
| Alimony/Child Support | \_ | | | Gender | | | \_ | | Marital Status | |
| Estate/Trust Payment, Royalties | \_ | | | Education | | | \_ | | Education | |
| Intrahousehold Transfers | \_ | | | Education | | | \_ | | Education | |
| Interhousehold Transfers | \_ | | | Disability Status | | | \_ | | Gender | |
| Food Stamps | \_ | | | Disability Status | | | \_ | | Home Ownership | |
| Other Pensions | ---- | | | ---- | | | ---- | | Education, Medicare-Only, Race | |

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Table X To be referenced in the next draft**  **Reported and Imputed Values for NBS Income Recipient (Respondent, Spouse, Combined Amount, or Inappropriate)\*** | | | | | | | | | | | | | |
|  | Reported Values | | | | Missing | Longitudinally  Imputed (Edited) Values | | | | Cross Sectionally  Imputed Values Retained | | | |
| **Income Recipient Variable:** | Resp. | Spouse | Comb. | Inap. | Values | Resp. | Spouse | Comb. | Inap. | Resp. | Spouse | Comb. | Inap. |
| Social Security | 3,783 | 367 | 4,976 | 4,788 | 47 | 16 | 0 | 27 | 4 | 0 | 0 | 0 | 0 |
| Supplemental Security Income | 80 | 33 | 31 | 13,773 | 45 | 0 | 0 | 1 | 44 | 0 | 0 | 0 | 0 |
| Railroad Retirement | 27 | 27 | 23 | 13,883 | 2 | 1 | 0 | 1 | 0 | 0 | 0 | 0 | 0 |
| Black Lung Benefits | 21 | 14 | 10 | 13,917 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Veteran's Benefits | 496 | 187 | 12 | 13,216 | 51 | 2 | 1 | 0 | 40 | 7 | 0 | 1 | 0 |
| State/Local Welfare | 11 | 30 | 5 | 13,914 | 2 | 1 | 0 | 1 | 0 | 0 | 0 | 0 | 0 |
| Earnings from Job | 1,646 | 2,304 | 951 | 8,964 | 97 | 26 | 28 | 19 | 24 | 0 | 0 | 0 | 0 |
| State/Local Government Pension | 613 | 251 | 96 | 12,954 | 48 | 2 | 5 | 3 | 38 | 0 | 0 | 0 | 0 |
| Military/Reserve Pension | 225 | 101 | 2 | 13,583 | 51 | 5 | 5 | 0 | 41 | 0 | 0 | 0 | 0 |
| Federal Employee Pension | 298 | 152 | 23 | 13,442 | 47 | 3 | 2 | 0 | 42 | 0 | 0 | 0 | 0 |
| Private Employer/Union Pension | 2,170 | 812 | 286 | 10,621 | 73 | 34 | 5 | 1 | 33 | 0 | 0 | 0 | 0 |
| Annuities | 333 | 86 | 24 | 13,450 | 69 | 5 | 0 | 1 | 63 | 0 | 0 | 0 | 0 |
| Worker's Compensation | 67 | 25 | 2 | 13,813 | 55 | 0 | 0 | 0 | 55 | 0 | 0 | 0 | 0 |
| Unemployment Compensation | 41 | 108 | 2 | 13,758 | 53 | 0 | 0 | 0 | 52 | 0 | 1 | 0 | 0 |
| Alimony/Child Support | 8 | 13 | 0 | 13,888 | 53 | 0 | 0 | 0 | 53 | 0 | 0 | 0 | 0 |
| Estate/Trust Payment, Royalties | 72 | 42 | 33 | 13,758 | 57 | 2 | 0 | 0 | 53 | 0 | 0 | 2 | 0 |
| Household Transfers | 29 | 27 | 79 | 13,773 | 54 | 0 | 0 | 1 | 53 | 0 | 0 | 0 | 0 |
| Interhousehold Transfers | 26 | 13 | 26 | 13,843 | 54 | 0 | 0 | 0 | 54 | 0 | 0 | 0 | 0 |
| Food Stamps | 0 | 0 | 269 | 13,641 | 52 | 0 | 0 | 0 | 52 | 0 | 0 | 0 | 0 |

Table footnotes to completed in next draft.

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Table XX To be referenced in the next draft**  **Reported and Imputed Values for NBF Income Recipient (Respondent, Spouse, Combined Amount, or Inappropriate)\*** | | | | | | | | | | | | | |
|  | Reported Values | | | | Missing | Longitudinally  Imputed (Edited) Values | | | | Cross Sectionally  Imputed Values Retained | | | |
| **Income Recipient Variable:** | Resp. | Spouse | Comb. | Inap. | Values | Resp. | Spouse | Comb. | Inap. | Resp. | Spouse | Comb. | Inap. |
| Social Security | 1,071 | 29 | 5,799 | 7,030 | 33 | 8 | 2 | 21 | 2 | 0 | 0 | 0 | 0 |
| Supplemental Security Income | 51 | 22 | 79 | 13,784 | 26 | 0 | 0 | 0 | 26 | 0 | 0 | 0 | 0 |
| Railroad Retirement | 12 | 21 | 21 | 13,908 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Black Lung Benefits | 14 | 7 | 8 | 13,933 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Veteran's Benefits | 357 | 130 | 6 | 13,438 | 31 | 0 | 0 | 0 | 27 | 4 | 0 | 0 | 0 |
| State/Local Welfare | 11 | 27 | 3 | 13,921 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Earnings from Job | 599 | 906 | 306 | 12,094 | 57 | 6 | 6 | 2 | 43 | 0 | 0 | 0 | 0 |
| State/Local Government Pension | 497 | 310 | 117 | 13,005 | 33 | 3 | 1 | 0 | 29 | 0 | 0 | 0 | 0 |
| Military/Reserve Pension | 179 | 77 | 2 | 13,672 | 32 | 2 | 2 | 0 | 28 | 0 | 0 | 0 | 0 |
| Federal Employee Pension | 249 | 143 | 19 | 13,518 | 33 | 1 | 1 | 0 | 31 | 0 | 0 | 0 | 0 |
| Private Employer/Union Pension | 1,691 | 727 | 390 | 11,119 | 35 | 11 | 2 | 2 | 20 | 0 | 0 | 0 | 0 |
| Annuities | 253 | 96 | 86 | 13,427 | 55 | 2 | 3 | 3 | 47 | 0 | 0 | 0 | 0 |
| Worker's Compensation | 38 | 17 | 0 | 13,869 | 38 | 0 | 0 | 0 | 38 | 0 | 0 | 0 | 0 |
| Unemployment Compensation | 18 | 39 | 1 | 13,866 | 38 | 0 | 0 | 0 | 38 | 0 | 0 | 0 | 0 |
| Alimony/Child Support | 4 | 6 | 1 | 13,914 | 37 | 0 | 0 | 0 | 37 | 0 | 0 | 0 | 0 |
| Estate/Trust Payment, Royalties | 52 | 28 | 30 | 13,814 | 38 | 0 | 0 | 0 | 37 | 1 | 0 | 0 | 0 |
| Household Transfers | 12 | 10 | 32 | 13,870 | 38 | 0 | 0 | 1 | 37 | 0 | 0 | 0 | 0 |
| Interhousehold Transfers | 17 | 10 | 29 | 13,865 | 41 | 0 | 0 | 0 | 41 | 0 | 0 | 0 | 0 |
| Food Stamps | 30 | 36 | 47 | 13,811 | 38 | 0 | 0 | 1 | 37 | 0 | 0 | 0 | 0 |

Table footnotes to be completed in next draft.

1. In addition to the values 0, 1, and 2 the income amount imputation flag may have a value of "3" indicating that the time period flag corresponding to a reported income amouont was missing. For these cases it was not known if the reported amount was for an annual period or some other period such as monthly or quarterly. [↑](#footnote-ref-1)
2. Recipiency and income from "other pensions" was asked in the NBF but not the NBS. Both recipiency and income from "other pensions" was imputed in the NBF. [↑](#footnote-ref-2)
3. The NBS measured savings accounts and credit union accounts separately while the NBF measured savings accounts and credit union accounts as a single item. Missing data for savings accounts and credit union accounts in the NBS were imputed as a single item. Similarly, the NBF made a distinction between interest and noninterest-bearing checking accounts, while the NBS did not. Missing data for interest and noninterest-bearing checking accounts in the NBF were imputed as a single item. [↑](#footnote-ref-3)
4. A different random number was generated for each missing case. [↑](#footnote-ref-4)
5. The NBF measured U.S. savings bonds and other bonds separately, while the NBS measured U.S. savings bonds and other bonds as a single item. Missing data for U.S. savings bonds and other bonds in the NBF were imputed as a combined single item. Similarly, the NBF made a distinction stocks and mutual funds, while the NBS did not. Missing data for stocks and mutual funds in the NBF were imputed as a combined single item and is referred to as "stocks" in the text. [↑](#footnote-ref-5)
6. IRA (respondent), IRA (spouse), home ownership, business equity, professional practice equity, farm equity, properties, other income, roomers and boarders, loan repayment, life insurance (respondent), and life insurance (spouse). [↑](#footnote-ref-6)
7. The NBF defines savings accounts to include credit union account, as well as other accounts at banks such as passbook accounts or Christmas club accounts. [↑](#footnote-ref-7)
8. NBF distinguishes between interest and noninterest bearing checking accounts. [↑](#footnote-ref-8)
9. Includes U.S. Government and others. The NBF makes a distinction between U.S. Government and other types of bonds. [↑](#footnote-ref-9)
10. Includes stocks and shares in mutual funds other than money market funds. The NBF makes a distinction between stocks and mutual funds. [↑](#footnote-ref-10)
11. Includes rental and/or commercial property, vacation home, or land. [↑](#footnote-ref-11)