Consumer Expenditure Surveys
Quarterly Interview Survey and
Diary Survey

Information Booklet
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RACE

1 — White

2 — Black

3 — American Indian, Eskimo, or Aleut

4 — Asian or Pacific Islander (Includes Japanese, Chinese, Filipino, Korean, Vietnamese, Asian Indian, Hawaiian, Samoan, Guamanian, etc.)
ORIGIN

01 — German
02 — Italian
03 — Irish
04 — French
05 — Polish
06 — Russian
07 — English
08 — Scottish
10 — Mexican American
11 — Chicano
12 — Mexican
14 — Puerto Rican
15 — Cuban
16 — Central or South American
17 — Other Spanish
20 — Afro-American
   (Black or Negro)
26 — Dutch
27 — Swedish
28 — Hungarian
30 — Another group not listed
EDUCATION

00 — Never attended, preschool, kindergarten

01 — 11 — 1st grade through 11th grade

38 — 12th grade, no diploma

39 — High school graduate — high school diploma, or the equivalent (For example: GED)

40 — Some college but no degree

41 — Associate degree in college — Occupational/Vocational program

42 — Associate degree in college — Academic program

43 — Bachelor’s degree (For example: BA, AB, BS)

44 — Master’s degree (For example: MA, MS, MEng, MEd, MSW, MBA)

45 — Professional School Degree (For example: MD, DDS, DVM, LLB, JD)

46 — Doctorate degree (For example: PhD, EdD)
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<td>September</td>
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<td>October</td>
<td>July</td>
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<tr>
<td>November</td>
<td>August</td>
</tr>
<tr>
<td>December</td>
<td>September</td>
</tr>
</tbody>
</table>
### Part B — GENERAL HOUSING CHARACTERISTICS

1. **Type of structure**
   - 1 — Single family detached (detached structure with only one primary residence; however, the structure could include a rental unit(s) in the basement, attic, etc.)
   - 2 — Row or townhouse — inner unit (2, 3, or 4 story structure with 2 walls in common with other units and a private ground level entrance; it may have a rental unit as part of the structure)
   - 3 — End row or end townhouse (one common wall)
   - 4 — Duplex (detached two unit structure with one common wall between the units)
   - 5 — 3-plex or 4-plex (3 or 4 unit structure with all units occupying the same level or levels)
   - 6 — Garden (a multi-unit structure, usually wider than it is high, having 2, 3, or possibly 4 floors; characteristically the units not only have common walls but are also stacked on top of one another)
   - 7 — High-rise (a multi-unit structure which has 4 or more floors)
   - 8 — Apartment or flat (a unit not described above; could be located in the basement, attic, second floor or over the garage of one of the units described above)
   - 9 — Mobile home or trailer
   - 10 — College dormitory

2. **Fuels**
   - 1 — Gas (underground pipes)
   - 3 — Electricity
   - 4 — Fuel oil

3. **Included with this housing unit**
   - 1 — Swimming pool
   - 2 — Tennis court
   - 3 — Barn or stable
   - 4 — Greenhouse
   - 5 — Guest house or separate servant’s quarters
   - 6 — Enclosed porch
   - 7 — Terrace
   - 8 — Patio or balcony
   - 9 — Apartment
   - 10 — Off street parking
   - 11 — Window air conditioning
   - 12 — Central air conditioning
Part C — MAJOR HOUSEHOLD APPLIANCES

1 — Electric cooking stove, range, or oven
   convection oven

2 — Gas cooking stove, range, or oven

3 — Microwave oven

4 — Other cooking stove, range, or oven
   woodburning stove

5 — Refrigerator

6 — Home freezer

7 — Built-in dishwasher

8 — Portable dishwasher

9 — Garbage disposal

10 — Clothes washer

11 — Clothes dryer

12 — Color television

13 — Computer, not solely for games

14 — Sound component, component system, or
      compact disc sound system

15 — Video tape recorder, video disc player, or
     video cassette recorder (VCR)
TYPES OF OWNED REAL ESTATE

100 — The home you currently live in

200 — A home you used to live in

600 — Property for business or investment purposes only

300 — A second home, vacation home, or recreational property

400 — Unimproved land with no buildings on it

500 — Other property
CLOSING COSTS

Property survey charges
Title search
Recording fees
Transfer taxes
Escrow payment
Points paid by buyer
Deed preparation
Lawyer’s fees
Advertising costs
COSTS FOR SELLING A PROPERTY

Commission to Realtor
Closing costs
Points for financing
Mortgage penalties
Property inspection
Lawyer’s fees
Advertising costs
Deferred mortgage interest payment
MORTGAGE DEFINITIONS

1 — Fixed rate mortgage (Conventional Mortgage, Fully Amortized Payment Mortgage)

2 — Rate of interest is not fixed and can go up or down over the life of the loan depending on the current interest rate (Variable Rate Mortgage, Adjustable Rate Mortgage, ARM)

3 — Payments start out low but increase later (Graduated Payment Mortgage)

4 — Interest and required payment are renegotiated on a regular basis through the life of the loan (Rollover or Renegotiable Mortgage)

5 — Initial interest and required payments are lower than usual mortgage rates. The lender receives the deferred interest plus a fee when the property is sold (Deferred Interest Mortgage)

6 — Loan to the homeowner which pays a cash amount to the homeowner each month until the home is sold or the owner dies. (Sometimes used by owners who have paid off an earlier mortgage, Reverse Annuity Mortgage.)

7 — Other (Specify)
MORTGAGE PAYMENT ITEMS

1 — Principal and interest
2 — Property taxes
3 — Property insurance
4 — Life insurance
5 — Mortgage guarantee insurance
6 — Any other payments (Specify)
FEES FOR COOPERATIVES

1 — Repayment of loans owed by cooperative
2 — Property taxes
3 — Property insurance
4 — Management
5 — Repairs and maintenance, including lawn care and snow removal
6 — Improvements
7 — Recreational, including swimming, golf, and tennis facilities
8 — Security, including guards and alarm systems
9 — Utilities: such as gas, electricity, water, heat
10 — Trash collection
11 — Other (Specify)
HOMEOWNER’S ASSOCIATIONS OR CONDOMINIUMS FEES

21 — Management

22 — Repairs and maintenance, including lawn care and snow removal

23 — Improvements

24 — Utilities: such as gas, electricity, water, heat

25 — Parking

26 — Recreational, including swimming, golf, and tennis facilities

27 — Security, including guards and alarm systems

28 — Maid service

29 — Medical services

30 — Trash collection

31 — Other (Specify)
Section 5 — CONSTRUCTION, REPAIRS, ALTERATIONS AND MAINTENANCE OF OWNED AND RENTED PROPERTY

JOB TYPES

100 — Dwellings under construction, including a vacation or second home

110 — Building an addition to the house or a new structure such as a porch, garage, or new wing

120 — Finishing a basement or an attic or enclosing a porch

130 — Remodeling one or more rooms in the house

140 — Landscaping the ground or planting new shrubs or trees

150 — Building outdoor patios, walks, fences, or other enclosures, driveways, or permanent swimming pools

160 — Repairing outdoor patios, walks, fences, driveways, or permanent swimming pools (including permanent above ground swimming pools)

170 — Inside painting or papering, spackling, sanding

180 — Outside painting, caulking, sanding, or surface repairs

190 — Plastering or paneling

200 — Plumbing or water heating installations and repairs

210 — Electrical work

220 — Heating or air conditioning jobs

230 — Flooring repair or replacement, including inlaid linoleum or vinyl tile

240 — Insulation

250 — Termite or other pest control

260 — Roofing, gutters, or downspouts

270 — Siding

280 — Installation, repair, or replacement of window panes, screens, storm doors, awnings, and the like

290 — Masonry, brick, or stucco work

300 — Other improvements or repairs
### APPLIANCES

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
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<tbody>
<tr>
<td>100</td>
<td>Electric cooking stove, range, or oven</td>
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<tr>
<td>110</td>
<td>Gas cooking stove, range, or oven</td>
</tr>
<tr>
<td>120</td>
<td>Microwave oven</td>
</tr>
<tr>
<td>130</td>
<td>Other cooking stove, range, or oven including wood, coal, or peat burning stoves</td>
</tr>
<tr>
<td>140</td>
<td>Refrigerator</td>
</tr>
<tr>
<td>150</td>
<td>Home freezer</td>
</tr>
<tr>
<td>160</td>
<td>Dishwasher — built-in</td>
</tr>
<tr>
<td>170</td>
<td>Dishwasher — portable</td>
</tr>
<tr>
<td>180</td>
<td>Garbage disposal</td>
</tr>
<tr>
<td>190</td>
<td>Clothes washer</td>
</tr>
<tr>
<td>200</td>
<td>Clothes dryer</td>
</tr>
<tr>
<td>210</td>
<td>Range hood</td>
</tr>
<tr>
<td>250</td>
<td>Smoke alarms and detectors</td>
</tr>
<tr>
<td>270</td>
<td>Trash compactor</td>
</tr>
<tr>
<td>340</td>
<td>Window air conditioner</td>
</tr>
<tr>
<td>350</td>
<td>Portable cooling and heating equipment, including portable dehumidifiers, humidifiers, fans, and space heaters; excluding window air conditioners</td>
</tr>
<tr>
<td>900</td>
<td>Other major home appliances and equipment</td>
</tr>
</tbody>
</table>
Part A — HOUSEHOLD APPLIANCES

COOKING STOVE, RANGE, OR OVEN

- **100** — Electric (including convection oven)
- **110** — Gas
- **120** — Microwave
- **130** — Other (such as a wood burning stove)

- **140** — REFRIGERATOR (including refrigerator/freezer combinations)
- **150** — HOME FREEZER
- **160** — DISHWASHER — Built-in
- **170** — DISHWASHER — Portable
- **180** — GARBAGE DISPOSAL
- **190** — CLOTHES WASHER (including washer/dryer combinations)
- **200** — CLOTHES DRYER
- **210** — RANGE HOOD

Part B — HOUSEHOLD APPLIANCES AND OTHER SELECTED ITEMS

SMALL HOUSEHOLD APPLIANCES

- **230** — Small electrical kitchen appliances, including —
  - automatic coffee maker
  - bag sealer
  - blender
  - broiler
  - burger grill
  - coffee grinder
  - coffee maker
  - corn popper
  - crepe machine
  - deep fryer
  - egg cooker
  - electric barbecue
  - electric can opener
  - electric cookie press
  - electric fondue set
  - electric fry pan
  - electric iron
  - electric knife
  - electric timer
  - electric wok
  - food processor
  - food slicer
  - food warmer
  - hot dog cooker
  - hot plate
  - ice cream maker
  - ice crusher
  - juicer
  - meat grinder
  - mixer
  - pasta machine
  - pressure cooker
- **(electric)**
  - cooker
  - roaster
  - sandwich grill
  - seal-a-meal
  - slow cooker
  - toaster
  - toaster oven
  - waffle iron
  - yogurt maker

- **240** — Electrical personal care appliances, including —
  - complexion brush
  - curling iron
  - denture cleaner
  - electric brush
  - electric comb
  - electric hair trimmer
  - electric manicure set
  - electric razor
  - electric scale
  - electric toothbrush
  - facial sauna
  - foot bath
  - hot comb
  - hair curler
  - hair dryer
  - hair setter
  - make-up mirror
  - massager
  - water-pik

- **250** — Smoke detectors, including —
  - wired
  - battery-operated
  - ionization
  - chamber type
  - photo-cell type

- **260** — Electric floor cleaning equipment, including —
  - vacuum cleaner
  - electric broom
  - rug shampooer
  - floor polisher
Section 6 — APPLIANCES, HOUSEHOLD EQUIPMENT AND OTHER SELECTED ITEMS — Continued

Part B — HOUSEHOLD APPLIANCES AND OTHER SELECTED ITEMS — Continued

270 — OTHER HOUSEHOLD APPLIANCES, including —
   trash compactor  home security devices (burglar alarms) including
   air purifier  console, control modules, burglar alarm console,
   water filters  door and window transmitters

280 — SEWING MACHINES (with or without cabinet)

590 — CALCULATORS

660 — TELEPHONES AND ACCESSORIES, including —
   telephones  cordless telephones  phone jacks and cords  car phones
   beepers  pagers  fax machines

610 — TELEPHONE ANSWERING DEVICES

620 — TYPEWRITERS AND OTHER OFFICE MACHINES FOR NONBUSINESS USE, including —
   typewriter  copy machine  adding machine

640 — COMPUTERS, COMPUTER SYSTEMS AND RELATED HARDWARE FOR NONBUSINESS USE, including —
   disk drives  home computers with or without CRT’s
   computer printers  tape equipment for computer use
   remote terminals  CRT units for computer use only
   modems  interface equipment
   monitors  cables
   mouse  fax modems
   joy sticks

650 — COMPUTER SOFTWARE AND ACCESSORIES FOR NONBUSINESS USE, including —
   software  floppy disks  mouse pads  printer cartridges

300 — PHOTOGRAPHIC EQUIPMENT, including —
   camera  winder  projection screen  battery pack for camera flash
   lens  enlarger  electro flash  motor driven film advancer
   tripod  projector  strobe light
   filters  (for photographs)
   Do not include film, film processing, or other photographic supplies.

310 — LAWNMOWING EQUIPMENT AND OTHER YARD MACHINERY, including —
   manual lawn mower  tractor (farm, garden, etc.)
   power lawn mower  electric lawn
   riding lawn mower  motor tiller
   snow blower
   electric saw
   sander
   lathe
   electric plane
   electric polisher
   electric swimming pool
   cleaning equipment

TOOLS FOR HOME USE

320 — Power tools, including —
   electric drill  router  lathe  electric plane
   electric saw  sander  electric plane
   electric polisher  electric swimming pool
   cleaning equipment

330 — Nonpower tools, including —
   wrench  socket  hammer
   axe  screwdriver
   pliers  chisel
   shovel  saw
   clamp  hex key
   nut driver  level
   plane  rake
   trouble light  drill
HEATING AND COOLING EQUIPMENT
340 — Window air conditioners
350 — Portable cooling and heating equipment, including —
fan dehumidifier humidifier space heater

TELEVISIONS, RADIOS, VIDEO AND SOUND EQUIPMENT (Not installed in vehicles)
360 — Color televisions (portable and table models)
370 — Color television consoles and combinations of TV; large screen color TV projection equipment; color monitors, and other items
380 — Black and white TV’s, and combinations of TV’s with other items
390 — VCR, video camera, video disc player, camcorder, including —
video cassette player video tape recorder/player
video disc player video laser disc player
video cassette recorder/player

670 — Satellite dishes
400 — Radio, all types, including —
CB (not permanently mounted in an automobile) clock radio short-wave transistor/portable
console walky-talky Walkman (radio only)

410 — Phonographs or record players
420 — Tape recorders and players (not permanently mounted in an automobile), including —
audio tape decks audio cassette players/recorders
reel-to-reel tape decks Walkman (cassette/radio combination or cassette only)

430 — Sound components, component systems, and compact disc sound systems
speakers amplifier tape deck (not specified)
mixer turntable compact disc players
stereo receiver stereo rack system
tuner equalizer

440 — Other sound and video equipment, including —
earphones/headphones battery packs adapter for sound equipment
power converter power booster UHF video converter
base station CB headset antenna (TV, radio, etc.)
antenna microphone VCR tape rewinder

MUSICAL INSTRUMENTS, SUPPLIES, AND ACCESSORIES
450 — Piano, organ, or keyboards
460 — Other musical instruments, supplies and accessories, including —
guitar reeds saxophone drums
valve oil sheet music music stand music books
woodwinds strings for musical instruments clarinet trumpet
brass instruments picks any other musical accessories
trombone stringed instruments rosin
SPORTS, RECREATION, AND EXERCISE EQUIPMENT

470 — General sports equipment, including —

- sports uniform
- baseball bat
- table tennis
- badminton set
- sports shoes
- football equipment
- soccer ball
- tennis ball
- basketball lawn games
- sports protective frisbee equipment
- tennis racket
- racquetball racket
- bowling ball
- racquetball racket bowling equipment
- golf ball
- baseball
- volleyball
- karate equipment
- golf clubs
- baseball glove
- roller skates
- pool equipment

*Include specialized athletic shoes such as for football, baseball, soccer, biking, and bowling, except if included in the rental or activity fee for the sport.*

480 — Health and exercise equipment, including —

- weights
- exercycle
- treadmill
- bullworker
- rowing machine
- weight bench
- exergym
- vibrator
- exercise mat

490 — Camping equipment, including —

- tent
- sleeping bag
- canteen
- portable heater
- kerosene lamp
- sleeping pad
- camping stove
- pack
- air mattress
- camping cookware

500 — Hunting and fishing equipment, including —

- fishing rod
- knife
- bow
- scopes (not specified)
- fishing reel
- rifle
- BB/pellet gun arrows
- fishing tackle
- shotgun
- ammunition
- cross bow

510 — Winter sports equipment, including —

- snow skis
- ski poles
- ice boat
- toboggan
- ski boots
- ice skates
- sledding equipment
- sled

520 — Water sports equipment, including —

- water skis
- snorkel
- diving equipment
- raft
- life jacket
- water ski vest
- surf board
- wind surf board

530 — Outboard motors

540 — Bicycles, including —

- bicycle parts
- locks
- rack
- supplies
- stand
- tires
- tubes

550 — Tricycles and battery powered riders, including —

- hotwheels

560 — Playground equipment, including —

- portable swimming pool
- swing set

570 — Other sports and recreation equipment

- telescope
- golf cart (non-riding)
Part B — HOUSEHOLD EQUIPMENT REPAIRS AND SERVICE CONTRACTS

100 — Garbage disposal, range hood, or built-in dishwasher

110 — Other household appliances and equipment, such as —
   washer
   refrigerator
   range/oven
   portable heating equipment
   portable air conditioning equipment (window air conditioner)
   portable fans
   dehumidifiers
   sewing machines
   typewriters
   vacuum cleaners

120 — Televisions, radios, video and sound equipment, except those installed in automobiles or other vehicles

220 — Computers, computer systems, and related equipment for non-business use

130 — Lawn and garden equipment (including lawn mower repair, snowblower repair)

140 — Musical instruments and accessories (including professional tuning)

150 — Hand or power tools

160 — Photographic equipment

170 — Sport and recreational equipment

180 — Personal care appliances

190 — Termite or pest control
   Include any services provided under service contracts.

200 — Heating or air conditioning equipment, such as —
   central air conditioners
   central coolers
   furnaces
   Include any services provided under service contracts.
   Do not include repairs.
Part A — Purchases

LIVING, FAMILY, OR RECREATION ROOM FURNITURE

100 — Sofas, including —
sofabed modular loveseat

101 — Living room chairs, including —
recliner rocker swivel
bean bag chair convertible chair

102 — Living room tables, including —
coffee table end tables cocktail table
TV table lamp table

103 — Modular wall units, shelves, or cabinets including —
shelves curio cabinet record cabinet
bookcase

104 — Ping-pong tables, pool tables, and other similar recreation room items

105 — Other living room, family, or recreation room furniture, including —
room divider bar stools desk/chair
coat rack foot stool (ottoman) gun cabinet
card table/chairs bar or porta bar

106 — Living room furniture combinations, including —
sofa, chair, and table combinations or suites

DINING ROOM AND KITCHEN FURNITURE

110 — All dining room and kitchen furniture, including —
dinette set serving table or cart buffet
dining table and chairs kitchen chairs china closet

BEDROOM FURNITURE

120 — Mattresses and springs including rollaways

121 — Bedroom furniture other than mattresses and springs
headboard dresser mirrors
brass bed vanity chairs
frames cedar chest armoire
bunk bed night tables water bed
chest
Part A — Purchases — Continued

INFANTS FURNITURE AND EQUIPMENT

130 — Infants furniture, including —
crib mattress chest
playpen dresser toy chest
highchair

131 — Infants equipment, including —
carriage car seat baby bottle sterilizer
stroller guard rail swing

OUTDOOR FURNITURE AND EQUIPMENT

140 — Patio, porch, or outdoor furniture

141 — Outdoor equipment, including —
barbecue grill patio lanterns patio umbrella

OFFICE FURNITURE FOR HOME USE

150 — All office furniture for home use, including —
file cabinet office chairs computer furniture
safe drawing table

*Do not include any furniture used exclusively for business.*

HOUSEHOLD DECORATIVE ITEMS

170 — Clocks

171 — Lamps and other lighting fixtures, including —
chandeliers

173 — Other household decorative items, including —
painting mirror professional portrait
sculpture planter fireplace equipment and
vase book ends accessories
ash tray weather instruments seasonal decorations
picture professional picture (Christmas)
Part A — Purchases — Continued

CLOSET STORAGE AND TRAVEL ITEMS

180 — Storage items, including —
  garment bag    shoe bag    shoe rack

181 — Travel items, including —
  suitcases    luggage    portable luggage carriers
  travel garment bags    trunk    attache cases

DISHES, DINNERWARE, FLATWARE, GLASSWARE, AND COOKWARE

190 — Plastic dinnerware, including Tupperware

191 — China and other dinnerware

192 — Stainless, silver, and other flatware, except plastic

193 — Glassware, including —
  crystal

195 — Serving pieces other than silver

196 — Nonelectric cookware, including —
  skillet    teakettle    Dutch oven
  saucepan    griddle    broiler
  crepe pan    roaster    pressure cooker
  pots    pans

198 — Silver serving pieces, including —
  tray    pitcher    bowl
Part A — Purchases — Continued

HOUSEHOLD LINENS

200 — Bedroom linens, including —
  sheets   comforter   baby blanket
  pillowcases   mattress pad   electric blanket
  pillows   quilt
  blanket/cover   bedspread

201 — Bathroom linens, including —
  towels   shower curtain   bath mat
  face cloths   bath rug   tub mat
  toilet cover

202 — Kitchen and dining room linens, including —
  tablecloths   linen napkins   dish cloths
  dish towels   cloth napkins   placemats
  small appliance cover

203 — Other linens, including —
  washer/dryer cover   covers for living room tables
  doilies

205 — Slipcovers, decorative pillows and cushions, custom or ready-made

FLOOR AND WINDOW COVERINGS

Wall-to-wall carpeting for one or more rooms

210 — Installed (original carpeting)

216 — Installed (replacement carpeting)

211 — Non-installed (original carpeting)

217 — Non-installed (replacement carpeting)

212 — Carpet squares

213 — Room-size rugs and other non-permanent floor coverings

214 — Curtains and drapes (either custom or ready-made)

215 — Venetian blinds, window shades, and other window coverings (either custom or ready-made)
Section 9 — CLOTHING AND SEWING MATERIALS

Part A — Clothing *(Do not include here — clothing for children under 2 years of age.)*

100 — COATS, JACKETS, AND FURS, including —
- shawl
- windbreaker
- rain slick
- stole
- fur jacket
- fur coat
- carcoat
- pants coat
- outerwear
- topcoat
- down vest
- raincoat (excluding plastic folded-up raincoat)

110 — SPORT COATS AND TAILORED JACKETS, including —
- blazer
- safari jacket
- shirt jacket

120 — SUITS, including —
- formal suit
- man’s suit (of two or more pieces)
- woman’s suit (of two or more pieces)

130 — VESTS (purchased separately, not with a suit), excluding sweater vests and down vests

140 — SWEATERS AND SWEATER SETS, including —
- cardigan
- sweater vest
- pullover
- ski sweater
- coat sweater
- V-neck sweater

150 — TROUSERS, SLACKS, JEANS AND DUNGAREES, including —
- jump suit
- dress pants
- work pants
- casual slacks
- coveralls
- dress slacks
- blue jeans
- sports slacks
- maternity pants

160 — SHORTS AND SHORT SETS, including men’s and boys’ dress and casual shorts and women’s and girls’ shorts and short sets.
*Do not include any athletic shorts.*

170 — DRESSES, including —
- jumpers
- muu-muu’s
- formal or semi-formals
- housedress
- two-piece dresses
- one or two-piece dresses
- Sundress
- Pant dresses
- Wedding gown

180 — SKIRTS AND CULOTTES, including —
- gauchos
- pant skirts
*Do not include any tennis skirts, golf skirts, or other athletic skirts.*

190 — SHIRTS, BLOUSES, AND TOPS, including —
- sport shirt
- jean shirt
- tops
- T-shirt
- dress shirt
- knit blouse
- work shirt
- maternity top
*Do not include any sweat shirts or athletic shirts.*
Section 9 — CLOTHING AND SEWING MATERIALS — Continued

Part A — Clothing (Do not include here — clothing for children under 2 years of age.) — Continued

200 — UNDERGARMENTS, including —
undershorts bras girdles thermal underwear
body stockings panties undershirts

210 — HOSIERY, including —
socks knee-highs stockings tights pantyhose

220 — NIGHTWEAR AND LOUNGEWEAR, including —
pajamas night shirt night gown thermal sleeping
robe house coat garments

230 — ACCESSORIES, including —
hat/bonnet ties gloves apron bridal headpiece
cap ascot mittens ear muffs bridal bouquet
hard hat scarf purse helmet beret
umbrella bow ties wallet handkerchief fold-up rain accessories
belt hand bag

240 — ACTIVE SPORTSWEAR, including—
athletic shorts tennis outfit sweatshirt athletic supporter/
athletic shirt jogging suit swimwear groin protector
hunting wear athletic skirt swimwear snow and ski suit
leotards accessories

Do not include any sports uniforms.

250 — UNIFORMS, other than sport, for which the cost is not reimbursed,
including shirts, pants, suits, service apparel, such as: medical, barber,
boy or girl scout, mechanic, waiter/waitress, plumber and lab smocks,
and military apparel

260 — COSTUMES, including costumes for dance, ballet, Halloween, etc.

280 — FOOTWEAR, including —
dress shoes sandals sneakers, jogging, aerobic,
boots bedroom slippers basketball, tennis shoes
casual shoes

Do not include specialized athletic shoes such as for football, soccer,
bowling, biking, or baseball.

Part B — Infants Clothing

Clothing for infants under 2 years of age

290 — COATS, JACKETS, SNOWSUITS

300 — DRESSES AND OTHER OUTERWEAR, including —
bathing suits sweater jogging suit crawler
sunsuit romper blouse tops
jumpsuit coveralls pants T-shirts
vest overalls pants set jeans
playsuit shirt short set
Section 9 — CLOTHING AND SEWING MATERIALS — Continued

Part B — Infants Clothing — Continued

310 — UNDERWEAR AND DIAPERS, including disposable
Do not include diaper service.

320 — SLEEPING GARMENTS

330 — LAYETTES

340 — ACCESSORIES, including —
boots  socks  booties  caps/hats
mittens/gloves  shoes  bibs  bonnets
slippers

Part B — Watches, Jewelry, and Hairpieces

370 — WATCHES, including —
analog and digital watches

380 — JEWELRY, including —
costume jewelry, rings, and infants jewelry

390 — HAIRPIECES, WIGS, OR TOUPEES

Part C — Sewing Materials

400 — SEWING AND KNITTING MATERIALS FOR THE HOME, including fabric
for making slipcovers, blankets, quilts, afghans, tablecloths, silk
flowers, curtains, etc., and for handwork including yarn

410 — SEWING MATERIALS FOR MAKING CLOTHES, including any fabric
used for making clothing, belts, handbags

420 — SEWING NOTIONS, including —
sewing basket  patterns  snaps  zipper
sewing kit  latch hooks  buttons  lining
crochet thread  crochet hooks  measuring tapes  needles/pins
embroidery thread  embroidery hoops  scissors or thread/thread
seam binding  needlepoint  pinking shears  caddy
button hole twist  stretchers  knitting needles, equipment

430 — OTHER SEWING MATERIALS, including —
interfacing  fiberfill  shredded foam  solid foam
beads, glitter, sequins  quilt pad  stuffing  felt or felt square
foam rubber  rug material

Part D — Clothing Services

450 — REPAIR, ALTERATION, AND TAILORING FOR CLOTHING AND
ACCESSORIES

460 — SHOE REPAIR AND OTHER SHOE SERVICES

470 — WATCH OR JEWELRY REPAIR, including cleaning

480 — CLOTHING RENTAL, including formal wear

490 — CLOTHING STORAGE
100 — AUTOMOBILE

110 — TRUCK, INCLUDING VANS, ALSO INCLUDES MINIVANS AND JEEPS

120 — MOTORIZED CAMPER-COACH

130 — TRAILER-TYPE CAMPER

140 — OTHER ATTACHABLE-TYPE CAMPER

150 — MOTORCYCLE, MOTOR SCOOTER OR MOPED (MOTORIZED BICYCLE)

160 — BOAT, WITH A MOTOR

170 — BOAT, WITHOUT A MOTOR

180 — TRAILER OTHER THAN CAMPER
    such as for a boat, or cycle — includes trailer for snowmobile or for moving, hauling, etc.

190 — PRIVATE PLANE

200 — ANY OTHER VEHICLE
    such as a snowmobile, dunebuggy, go-cart or riding golf cart (except charges for rental of golf carts included in golfing fees)
### Part A — Vehicle Maintenance and Repair, Parts, and Equipment

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
</table>
| **100** | OIL CHANGE, LUBRICATION, and OIL FILTER  
  *(Include oil only if purchased for an oil change)* |
| **110** | MOTOR TUNE-UP, including — |
| | adjust ignition  
  timing or mixture  
  adjust valve  
  air/fuel filters  
  breather/vapor/air filter element  
  computer sensor  
  distributor cap, rotor  
  emission controls  
  ignition wires  
  pcv valve  
  spark plugs |
| **120** | BRAKE WORK, including — |
| | anti-lock brake  
  bleed brake system  
  brake adjustment  
  brake fluid  
  hydraulic system  
  master cylinder  
  machine drums/rotors  
  parking brake shoes or pads  
  wheel calipers  
  wheel cylinder |
| **130** | BATTERY PURCHASES AND INSTALLATION |
| **140** | TIRE PURCHASES AND MOUNTING |
| **150** | TIRE REPAIRS |
| **160** | FRONT END ALIGNMENT, WHEEL BALANCING, WHEEL ROTATION |
| **170** | STEERING OR FRONT-END WORK, including — |
| | axle bearing/seals  
  axle shafts  
  ball joints  
  bushings  
  CV joints/boots  
  idler arms  
  power steering fluid/filter  
  rack and pinion steering box/linkage  
  studs, lug nuts  
  tie rods  
  wheel hubs |
| **180** | ELECTRICAL SYSTEM WORK, including — |
| | alternator belt  
  alternator/generator  
  battery charging  
  car computer  
  coil  
  gauges/instruments  
  ignition system  
  starter motor switches  
  voltage-regulator wiring |
### Section 12 — VEHICLE OPERATING EXPENSES — Continued

#### 190 — ENGINE REPAIR OR REPLACEMENT, including —

<table>
<thead>
<tr>
<th>Item</th>
<th>Item</th>
<th>Item</th>
<th>Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>carburetor</td>
<td>fuel injector</td>
<td>motor mounts</td>
<td>timing chain/</td>
</tr>
<tr>
<td>choke</td>
<td>fuel pump/lines/</td>
<td>oil pump/coolers/</td>
<td>gears or belt</td>
</tr>
<tr>
<td>crankshaft</td>
<td>filter</td>
<td>hoses/lines</td>
<td>turbo charge</td>
</tr>
<tr>
<td>bearings</td>
<td>gaskets</td>
<td>pistons/rods</td>
<td></td>
</tr>
</tbody>
</table>

#### 200 — AIR CONDITIONING WORK, including —

<table>
<thead>
<tr>
<th>Item</th>
<th>Item</th>
<th>Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>compressor</td>
<td>condenser</td>
<td>motor/switch</td>
</tr>
<tr>
<td>recharging</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### 210 — ENGINE COOLING SYSTEM WORK, including —

<table>
<thead>
<tr>
<th>Item</th>
<th>Item</th>
<th>Item</th>
<th>Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>coolant or filter</td>
<td>fan or water pump</td>
<td>heater core</td>
<td>radiator</td>
</tr>
<tr>
<td>cooling fan/</td>
<td>belt</td>
<td>hoses</td>
<td>thermostat</td>
</tr>
<tr>
<td>controls</td>
<td>fan switch or motor</td>
<td>pressure cap</td>
<td></td>
</tr>
<tr>
<td>cooling fan relay</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### 300 — EXHAUST SYSTEM WORK, including —

<table>
<thead>
<tr>
<th>Item</th>
<th>Item</th>
<th>Item</th>
<th>Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>catalytic converter</td>
<td>hanger/clamps</td>
<td>muffler</td>
<td>resonator</td>
</tr>
<tr>
<td>exhaust pipe</td>
<td>manifold gasket</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### 310 — CLUTCH OR TRANSMISSION WORK, including —

<table>
<thead>
<tr>
<th>Item</th>
<th>Item</th>
<th>Item</th>
<th>Item</th>
<th>Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>clutch cable</td>
<td>hydraulic system</td>
<td>rebuilt</td>
<td>transaxle</td>
<td></td>
</tr>
<tr>
<td>clutch fork</td>
<td>master cylinder</td>
<td>transmission</td>
<td>transmission filter</td>
<td></td>
</tr>
<tr>
<td>flywheel</td>
<td>pilot bearing</td>
<td>safety switch</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>shaft seal</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### 320 — BODY WORK AND PAINTING, including —

<table>
<thead>
<tr>
<th>Item</th>
<th>Item</th>
<th>Item</th>
<th>Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>convertible top</td>
<td>doors</td>
<td>rust proofing</td>
<td>T-roof</td>
</tr>
<tr>
<td>crash repairs</td>
<td>glass replaced</td>
<td>sanding</td>
<td>vinyl top</td>
</tr>
</tbody>
</table>

#### 330 — SHOCK ABSORBER REPLACEMENT, including MacPherson struts
### Section 12 — VEHICLE OPERATING EXPENSES — Continued

#### 340 — DRIVE SHAFT OR REAR-END WORK, including —
- axle fluid
- CV joints
- rear axle
- suspension
- axle mounts/
  - differential
  - grommet
  - tie rods
  - bushings
  - rear wheel axle seal
  - universal joint
  - coil or leaf springs
  - rear wheel bearings
  - tie rods
- CV joints
- differential
- grommet
- tie rods
- universal joint
- rear axle
- suspension

#### 350 — AUDIO EQUIPMENT AND INSTALLATION, including —
- antenna
- CB radio
- speakers
- tape player
- CB antenna
- radio
- stereo equipment

#### 360 — VEHICLE ACCESSORIES AND CUSTOMIZING, including —
- alarm system
- carpeting
- running boards
- steering wheel
- bike/ski racks
- fender skirts
- seat covers
- covers
- bumper guards
- luggage rack
- spoilers

#### 370 — OTHER VEHICLE SERVICES, PARTS, AND EQUIPMENT, including —
- battery cables
- gas cable/cap/can
- jack
- vent filters
- brake lights
- gasket sets
- light bulbs
- wheel lugs
- car wash
- headlights
- speedometer cable
- wheels
- charcoal canister-
  - filters
  - heater repair
  - tire pressure gauge
  - windshield-
  - hub caps
  - tire/wheel
  - wipers
  - combination
Section 13 — INSURANCE OTHER THAN HEALTH

100 — LIFE INSURANCE OR OTHER POLICIES WHICH PROVIDE BENEFITS IN CASE OF DEATH OR DISABILITY, including —

- Term Insurance
- Whole-Life Insurance
- Cash Benefits
- Mortgage Insurance
- Veterans Insurance
- Annuities
- Income or Disability Insurance
- Group-Life Insurance
- Straight-Life Insurance
- Flight Insurance
- Life Endowments
- Burial Insurance
- Long-Term Care Insurance

200 — AUTOMOBILE OR OTHER VEHICLE INSURANCE, including —

- Liability Insurance
- Collision Insurance
- Comprehensive Insurance
- Bodily Injury Insurance
- Property Damage Insurance
- No-Fault Insurance

HOME INSURANCE
Insurance protecting your home, furniture, personal effects, or other property against fire, theft, loss, earthquakes, or damage from other means.

300 — HOMEOWNER’S INSURANCE, including any insurance covered in mortgage payments or flood insurance

400 — TENANT’S INSURANCE

500 — FIRE AND EXTENDED COVERAGE INSURANCE

600 — OTHER TYPES OF NONHEALTH INSURANCE, including —

- Credit Card Insurance
- Personal Liability Insurance
- Mortgage Guarantee Insurance
- Ambulance
- Umbrella policies

Do not include malpractice insurance.
1 — HEALTH MAINTENANCE ORGANIZATION

Expenses in this type of plan are usually covered in full or there is a modest co-payment at the time of your visit. There are two basic types of HMO’s. The first is the group/staff type in which you go to a central facility (group health center) to receive care. The second type is an independent practice association (IPA) in which providers work from their individual offices and are referred to as primary care physicians.

2 — FEE FOR SERVICE PLAN

In a fee for service type of plan you or your insurance company is generally billed after each visit. In a traditional fee for service plan you may go to any doctor or hospital you choose. In a Preferred Provider Organization (PPO) you are provided with a list of doctors from which you may choose. If you choose to go to one of the doctors on the PPO list, the amount of expenses covered is higher than if you go to a doctor not on the list.

3 — COMMERCIAL MEDICARE SUPPLEMENT

A Commercial Medicare Supplement is a voluntary contributory private insurance plan available to Medicare recipients, to cover the costs of deductibles, coinsurance, physician services and other medical and health services.

4 — SPECIAL PURPOSE PLAN

A special purpose plan is one which covers only specific health needs. Examples of special purpose health insurance plans are —

Dental Insurance
Vision Insurance
Prescription Drug Insurance

Mental Health Insurance
Dread Disease Policy
Section 15 — MEDICAL AND HEALTH EXPENDITURES

EYE CARE

110 — EYE EXAMINATIONS, TREATMENT, OR SURGERY, such as —
- eye examinations
- surgery
- eye treatments

120 — PURCHASE OF EYE GLASSES OR CONTACT LENSES, such as —
- eye glasses
- contact lenses
- warranty expenses
- insurance

DENTAL CARE

200 — DENTAL CARE, such as —
- examinations
- cleanings
- X-rays
- dentures
- bridges
- orthodontic work
- fillings
- caps or crowns

INPATIENT HOSPITAL CARE

310 — HOSPITAL ROOM, such as —
- room
- meals

320 — HOSPITAL SERVICES, including all services provided and billed by the hospital, such as —
- operating room
- recovery room
- X-rays
- oxygen
- anesthetics
- laboratory tests
- intensive care unit
- drugs and medicine
- treatment rooms
- nursing services
- examinations
- therapy
- injections
- blood transfusions
- any other services
SERVICES BY MEDICAL PROFESSIONALS OTHER THAN PHYSICIANS

410 — ALL SERVICES BY MEDICAL PROFESSIONALS OTHER THAN PHYSICIANS, such as —

- chiropractor
- acupuncturist
- homeopath
- physical therapist
- podiatrist
- midwife
- naturopath
- nurse practitioners
- substance abuse professionals
- marriage counselor
- psychologist

PHYSICIAN SERVICES

420 — ALL SERVICES PROVIDED AND BILLED BY PHYSICIANS, such as —

- general practitioner
- gynecologist
- urologist
- osteopath
- plastic surgeon
- internist
- dermatologist
- psychiatrist
- surgeon
- pediatrician
- any other type of physicians

OTHER MEDICAL CARE SERVICES

510 — LAB TESTS OR X-RAYS

- X-rays
- blood tests
- other types of lab tests

*Do not include services received in a hospital as an inpatient or services for eye and dental care.*

520 — CARE IN CONVALESCENT OR NURSING HOME, such as —

- substance abuse centers
- nursing home

*Include all services provided and billed by a convalescent or nursing home.*

530 — OTHER MEDICAL CARE, such as —

- ambulance services
- rescue services
- blood donation
- outpatient hospital care
- emergency room services
- cardiogram
- skin treatment
- hearing test
- cancer treatment
- baby shots
- physicians check up
- broken/sprained bones
- blood pressure check

*If medical care is given in outpatient department or emergency room, include —*
MEDICINE AND MEDICAL SUPPLIES

610 — PURCHASE OF HEARING AIDS

620 — PRESCRIBED MEDICINES OR PRESCRIBED DRUGS

630 — RENTAL OF SUPPORTIVE OR CONVALESCENT MEDICAL EQUIPMENT, such as —
- braces
- crutches
- canes
- walkers
- splints
- cervical collars
- wheelchairs
- whirlpools
- slings
- ace bandages

640 — PURCHASE OF SUPPORTIVE OR CONVALESCENT MEDICAL EQUIPMENT, such as —
- braces
- crutches
- canes
- walkers
- splints
- cervical collars
- wheelchairs
- whirlpools
- slings
- ace bandages

650 — RENTAL OF MEDICAL OR SURGICAL EQUIPMENT FOR GENERAL USE, such as —
- ice bags
- hot water bottles
- heating pads
- sinus masks
- blood pressure kits
- vaporizers
- sun lamps
- therapeutic heat lamps

660 — PURCHASE OF MEDICAL OR SURGICAL EQUIPMENT FOR GENERAL USE, such as —
- thermometers
- ice bags
- hot water bottles
- heating pads
- pollen masks
- sinus masks
- insulin needles
- syringes
- blood pressure kits
- vaporizers
- sun lamps
- therapeutic heat lamps
- ostomy supplies
- oxygen
- orthopedic appliances (supports)

Do not include purchases of items such as band aids, gauze, cotton roll, and cotton balls.
### Section 16 — EDUCATIONAL EXPENSES

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>100</strong></td>
<td>RECREATIONAL LESSONS OR OTHER INSTRUCTIONS, including —</td>
</tr>
<tr>
<td></td>
<td>golf</td>
</tr>
<tr>
<td></td>
<td>tennis</td>
</tr>
<tr>
<td></td>
<td>skiing</td>
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<tr>
<td></td>
<td>swimming</td>
</tr>
<tr>
<td></td>
<td>skydiving</td>
</tr>
<tr>
<td></td>
<td>cooking</td>
</tr>
<tr>
<td><strong>200</strong></td>
<td>NURSERY SCHOOL OR CHILD DAY CARE CENTERS, including noninstructional day camps</td>
</tr>
<tr>
<td><strong>300</strong></td>
<td>TUITION, including —</td>
</tr>
<tr>
<td></td>
<td>college or university</td>
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<tr>
<td></td>
<td>high school</td>
</tr>
<tr>
<td></td>
<td>seminary</td>
</tr>
<tr>
<td></td>
<td>preparatory school</td>
</tr>
<tr>
<td></td>
<td>Include only those expenses paid directly to the school or to other educational facility.</td>
</tr>
<tr>
<td><strong>310</strong></td>
<td>HOUSING WHILE ATTENDING SCHOOL, including —</td>
</tr>
<tr>
<td></td>
<td>student dormitory</td>
</tr>
<tr>
<td></td>
<td>fraternity</td>
</tr>
<tr>
<td></td>
<td>Include only those expenses paid directly to the school or to other educational facility.</td>
</tr>
<tr>
<td><strong>320</strong></td>
<td>FOOD OR BOARD WHILE ATTENDING SCHOOL</td>
</tr>
<tr>
<td></td>
<td>Include only those expenses paid directly to the school or to other educational facility.</td>
</tr>
<tr>
<td><strong>340</strong></td>
<td>RENTAL OF ANY SCHOOL BOOKS OR EQUIPMENT, WHICH HAS NOT ALREADY BEEN REPORTED, including —</td>
</tr>
<tr>
<td></td>
<td>text books</td>
</tr>
<tr>
<td></td>
<td>microscopes</td>
</tr>
<tr>
<td></td>
<td>technical books</td>
</tr>
<tr>
<td><strong>350</strong></td>
<td>PURCHASE OF ANY SCHOOL BOOKS, SUPPLIES, OR EQUIPMENT, WHICH HAS NOT ALREADY BEEN REPORTED, including —</td>
</tr>
<tr>
<td></td>
<td>text books</td>
</tr>
<tr>
<td></td>
<td>microscopes</td>
</tr>
<tr>
<td></td>
<td>technical books</td>
</tr>
<tr>
<td><strong>360</strong></td>
<td>OTHER SCHOOL RELATED EXPENSES NOT ALREADY REPORTED, including —</td>
</tr>
<tr>
<td></td>
<td>laboratory fees</td>
</tr>
<tr>
<td></td>
<td>registration fees</td>
</tr>
<tr>
<td></td>
<td>laundry fees</td>
</tr>
</tbody>
</table>
TYPES OF TRANSPORTATION

(COMMERCIAL)

1 — local (taxi, etc.)
2 — airplane
3 — train
4 — bus
5 — ship

(RENTED)

6 — car, jeep
7 — truck, van
8 — motorcycle, moped
9 — private plane
10 — boat, trailer
11 — camper
12 — other vehicles

(PRIVATE)

13 — car owned by CU
14 — vehicle leased by CU
15 — other vehicle owned by CU
16 — vehicle owned by someone else

17 — other transport
RENTAL OF SPORTS EQUIPMENT

Golf clubs
Skis
Fishing equipment
Boat
Other sports equipment
FEES FOR PLAYING SPORTS

Golf
Fishing
Swimming
Tennis
Skiing
Bowling
Exercise classes
Other sports
Section 18 — TRIPS AND VACATIONS — Continued

ENTERTAINMENT OR ADMISSIONS

Movies
Theater
Concerts
Museums
Tours
Sports events
Other entertainment event
Section 19 — MISCELLANEOUS EXPENSES

100 — FUNERALS, BURIALS, OR CREMATION
burial fees  limousines (used during funeral)  flowers for funeral  burial plans

110 — PURCHASE OR UPKEEP OF CEMETERY LOTS OR VAULTS

130 — CATERED AFFAIRS, including —
bridal showers  parties  Bar Mitzvah
weddings  graduations  Bat Mitzvah
anniversaries  confirmations

140 — FRESH FLOWERS OR POTTED PLANTS

150 — LEGAL FEES, including —
Will  Divorce  Contracts
Do not include fees for business purposes or those related to closing costs for the purchase of real estate.

160 — ACCOUNTING FEES, including —
income tax  trust management  estate management preparation
Do not include fees for business purposes.

HOME SERVICES PROVIDED BY NON-CU MEMBER

170 — GARDENING OR LAWN CARE SERVICES, including —
fertilize lawn, etc.  lawn cutting  hedge trimming
tree removal  tilling  tree pruning
planting  plowing
Include any services provided under service contracts.
Do not include services which are covered by management or maintenance fees.

180 — HOUSEKEEPING SERVICES, including —
cleaning  laundering  cooking
window washing  carpet cleaning

210 — OTHER HOME SERVICES AND SMALL REPAIR JOBS AROUND THE HOUSE, NOT PREVIOUSLY REPORTED
Include diaper service.

190 — BABYSITTING OR OTHER CHILD CARE IN YOUR HOME
Do not include nursery school care or care in a day care center.

220 — BABYSITTING OR OTHER CHILD CARE IN SOMEONE ELSE’S HOME
Do not include nursery school care or care in a day care center.
200 — CARE FOR INVALIDS, CONVALESCENTS, HANDICAPPED, OR ELDERLY PERSONS IN THE HOME

*Do not include institutional or medical care.*

350 — ADULT DAY CARE CENTERS

280 — COMPUTER INFORMATION SERVICES

- computer bulletin
- internet services
- board services

290 — TV COMPUTER GAMES AND COMPUTER GAME SOFTWARE

- TV computer game
- video game hardware
- video games

300 — HAND HELD COMPUTER GAMES AND COMPUTER BOARD GAMES

330 — TOYS AND GAMES

- games
- stuffed animals
- dolls
- infant toys
- dart board
- darts
- trains

340 — HOBBIES

- model kits
- needlepoint kits
- arts and craft supplies
- rug kits
- knitting kits

230 — MOVING, STORAGE, AND FREIGHT EXPRESS

*Do not include expenses that are reimbursed by employer or other persons outside of the CU.*

240 — PURCHASE OF PETS, PET SUPPLIES, AND MEDICINE FOR PETS, including —

- aquarium
- tropical fish
- dog house
- hamster cage
- pet toys
- bird cage
- dog
- guinea pig
- cat
- bird
- hamster
- gerbil

250 — PET SERVICES, including —

- grooming
- kennels
- license

260 — VETERINARIAN EXPENSES FOR PETS

310 — ALIMONY

320 — CHILD SUPPORT

270 — MONEY GIVEN TO NON-CU MEMBERS, CHARITIES, AND OTHER ORGANIZATIONS, including contributions to —

- charities
- churches
- schools
- civic organizations

*Also include cash gifts given to students away at a college or university.*
1. Loss

2. Under $3,000

3. $3,000 — $5,999

4. $6,000 — $7,499

5. $7,500 — $9,999

6. $10,000 — $12,999

7. $13,000 — $14,999

8. $15,000 — $19,999

9. $20,000 — $24,999

10. $25,000 — $29,999

11. $30,000 — $34,999

12. $35,000 — $49,999

13. $50,000 — $74,999

14. $75,000+
# OCCUPATIONS

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<th>Code</th>
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<td>ADMINISTRATOR, MANAGER</td>
<td>administrator, manager, funeral director</td>
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<td>02</td>
<td>TEACHER</td>
<td>teacher, guidance counselor</td>
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<td>03</td>
<td>PROFESSIONAL</td>
<td>registered nurse, accountant, computer programmer, computer systems analyst, social worker, physician, engineer, lawyer, clergy</td>
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<td>ADMINISTRATIVE SUPPORT, INCLUDING CLERICAL</td>
<td>secretary, bookkeeper, clerk, computer assistant, receptionist, typist</td>
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<td>SALES, RETAIL</td>
<td>cashier, commodity salesperson, apparel salesperson, motor vehicle salesperson, door to door salesperson</td>
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<td>SALES, BUSINESS GOODS AND SERVICES</td>
<td>mining sales representative, real estate sales person, financial services, wholesale sales representative, manufacturing sales representative, insurance salesperson</td>
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<td>health technician, practical nurse, clinical laboratory technician, drafting, electronic technician</td>
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<td>PROTECTIVE SERVICE</td>
<td>private guard, police officer, firefighter</td>
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<td>PRIVATE HOUSEHOLD SERVICE</td>
<td>nanny, household worker</td>
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<td>OTHER SERVICE</td>
<td>janitor, cook, food preparer, food counter/fountain worker, child care worker, hairstylist, waiter/waitress, orderly, maid/houseman</td>
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<td>MACHINE OPERATOR, ASSEMBLER, INSPECTOR</td>
<td>machine operator, assembler, inspector</td>
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<td>TRANSPORTATION OPERATOR</td>
<td>truck driver, bus driver, tractor operator</td>
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<td>stock handler, freight handler, material handler, construction laborer, packager</td>
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In using this chart, determine age as follows: Locate the birth year of the person on the chart. If the person has not had a birthday as of the day of the interview in 1996, the correct age will be shown in the "No" column. If the person has had a birthday, the correct age will be in the "Yes" column.

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</table>
AGE — 1997

AGE VERIFICATION CHART FOR 1997

INSTRUCTIONS
In using this chart, determine age as follows: Locate the birth year of the person on the chart. If the person has not had a birthday as of the day of the interview in 1997, the correct age will be shown in the "No" column. If the person has had a birthday, the correct age will be in the "Yes" column.

<table>
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# FRACTION CONVERSION CHART

## Fractions to Percentages

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<th>%</th>
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</table>
When reviewing the Diary, check each page in the form. Be sure that ALL entries have as much detail as possible. The following are EXAMPLES of information that is often omitted.

I. EXPENDITURE DETAIL CHECK EXAMPLES

FOOD FOR HOME CONSUMPTION

MILK — Specify whether the milk is whole, skim, etc.

BREAD — Specify if white, whole wheat, rye, pumpernickel, etc.

BAKERY PRODUCTS — Specify type such as cupcakes, apple pie, etc.

BEEF — Specify the cut of beef and describe, such as round steak, ground beef, prime rib, etc.

PORK — Specify the cut and describe, such as pork loin roast, whole ham, pork spareribs

POULTRY — Specify whether it is chicken, turkey, or other

CHICKEN — Specify if whole or parts, such as chicken legs, chicken wings, etc.

JUICE, BEVERAGE — Specify type such as orange juice, grape juice, fruit punch

SOFT DRINKS — Specify if cola or other type; if not cola, specify if carbonated or noncarbonated

COFFEE — Specify if instant or ground

OTHER FOOD — Give a complete description, such as boxed scalloped potatoes

FOOD AWAY FROM HOME

MEALS — Specify the type of meal (lunch, breakfast, snack, dinner). Indicate whether alcohol is included with the yes/no alcohol question for all meals. If alcohol is included specify the type (beer, wine, whiskey, etc.) and the cost.

ALCOHOLIC BEVERAGES — If the purchase is exclusively alcohol, specify the type of alcohol (beer, wine, etc.) and both the total cost and the alcohol cost, which should be identical. Both cost entries must be recorded. Be sure that the yes/no question is answered.
DIARY SURVEY CHECKS
FOR THE DIARY FORM CE-801 — Continued

CLOTHING, SHOES, AND JEWELRY

CLOTHING — Specify the type of clothing and give a description of the item purchased. Enter code indicating for whom the item was purchased.

SHOES — If sport shoes, specify sport such as football cleats, ice skates, etc. Enter code indicating for whom the shoes were purchased.

JEWELRY — Specify the type of jewelry, such as watches, etc. Enter code indicating for whom the jewelry was purchased.

ALL OTHER PURCHASES AND EXPENSES

MEDICINE — Specify if prescribed or over the counter, such as nonprescription cough medicine

DOCTOR BILLS — Specify type of doctor, such as dentist, internist

SOAP — Specify hand soap or laundry soap

LAUNDRY/DRY CLEANING — Specify if coin operated or not coin operated; specify whether household item (such as drapes) or apparel

TABLEWARE — Specify type, such as china, flatware, silver serving pieces, etc.

DISHWASHER — Specify whether it is portable or built-in

FURNITURE — Specify type such as kitchen chair, living room chair, etc.

TELEVISION — Specify black/white, color portable, color console

TOOLS — Specify if power or hand tool, such as power saw, etc.

ALBUM — Specify photo album or record album

GAS — Specify if gasoline or household fuel. If household fuel, indicate whether piped or bottled.

VEHICLE — Specify new or used and type of vehicle purchased

VEHICLE REGISTRATION — Specify state or local

VEHICLE REPAIR — Specify type of repair done such as brake work other than brake adjustment, exhaust system repair

VEHICLE SERVICE — Specify the type of service such as oil change, lube, brake adjustment, etc.

BUS, TRAIN — Specify intercity or intracity fare

TUITION — Specify high school, college, etc.

BOOKS — Specify whether it was part of a book club, a school book, or a non-school book. If the purchase was for school, then whether it was college, high school, or other.
II. CONTENT CHECKS

1. All entries should be clearly readable. If there is an entry which is not, rewrite it. Entries that contain brand names, local names or acronyms should be clarified and rewritten.

2. If the respondent reports no expenditures for a day, mark the "NONE" box in the upper left corner of the first page of that diary day.

3. Be sure there is an amount entered in the total cost column for every item entry in the diary and that the amount entered is reasonable. If an amount is unusually high or low, confirm it with the respondent. Whenever possible, a single cost for each item is required. Investigate any combined expense to determine if individual costs can be identified.

4. In Part 1, Food for Home Consumption, and Part 2, Food and Beverages Purchased as Gifts, be sure there is an entry in column c to indicate whether the food is fresh, frozen, etc.

5. In Part 3, Food Away From Home, check to assure that the yes/no box is appropriately marked. If the "Yes" box is marked under column d, which indicates that alcoholic beverages were purchased, there should also be an amount entered in column e. There should always be a total cost in column c.

6. In Part 4, Clothing, Shoes, and Jewelry, be sure there is an entry in column d to indicate whether the purchase was for someone outside the consumer unit. Be sure that column e indicates for whom the item was purchased.

7. In Part 5, All Other Purchases and Expenses, be sure there is an entry in column d to indicate whether the purchase was for someone outside the consumer unit.
When reviewing the Household Characteristics Questionnaire (CE-802) be sure that the information for all of the following items is recorded as specified below.

1. All diary forms are with their corresponding CE-802 forms.

2. The dates you entered on the cover of the diary form match the dates you entered in CE-802 cover item 19.

3. All four interview status codes have been entered in CE-802 cover item 20.

4. For noninterviews, check that the appropriate items in CE-802 cover item 22 have been filled out.

5. Be sure all blank items which require entries are explained in the notes.

6. All notes should be referenced to their questionnaire items.

7. All entries should be clearly marked or written.

8. Verify that there are no written responses, such as "Don’t know," "DK," "None," or "Not applicable," in entries which require a numeric response.

9. Verify that only the appropriate number of responses for each item have been recorded. Most items require only one response.

10. Verify that the Household Record information has been properly recorded on form CE-802 for each CU.

11. Verify that a CE-802 has been filled out for each CU (including noninterviews).
<table>
<thead>
<tr>
<th>IF</th>
<th>AND IF</th>
<th>AND IF</th>
<th>THEN</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Week 1 Diary <strong>is not</strong> placed within the 7-day placement period,</td>
<td></td>
<td></td>
<td>Week 1 Diary is a noninterview.</td>
</tr>
<tr>
<td>2. Week 1 Diary is placed during the 7-day placement period,</td>
<td>Week 1 Diary is picked up during the 7 days allowed for pick-up,</td>
<td>Week 1 Diary is complete,</td>
<td>Week 1 Diary is an interview.</td>
</tr>
<tr>
<td>3. Week 1 Diary is placed during the 7-day placement period,</td>
<td>Week 1 Diary is picked up on the 8th day after placement,</td>
<td>Week 1 Diary is <strong>not complete</strong>, that is, the respondent has either entered <strong>no</strong> expenditures or only <strong>some</strong> expenditures,</td>
<td>Complete Week 1 Diary through recall and code as an interview.</td>
</tr>
<tr>
<td>4. Week 1 Diary is placed during the 7-day placement period,</td>
<td>Week 1 Diary is picked up on the 9th through 14th day after placement,</td>
<td>Week 1 Diary is <strong>partially complete</strong>, that is, respondent entered only some, but not all, expenditures,</td>
<td><strong>Do not collect</strong> any expenditures through recall. Code the Week 1 Diary as an interview. Recall on Week 2 Diary for days between the end of Week 1 Diary and placement of Week 2 Diary.</td>
</tr>
<tr>
<td>5. Week 1 Diary is placed during the 7-day placement period,</td>
<td>Week 1 Diary is picked up on the 9th through 14th day after placement,</td>
<td>Week 1 Diary is <strong>blank</strong>, that is, the respondent had expenditures but did not record them,</td>
<td>The Week 1 Diary is Type A, code 05, &quot;Other,&quot; and explain in Notes space. Recall on Week 2 Diary for days between the end of Week 1 Diary and placement of Week 2 Diary.</td>
</tr>
<tr>
<td>6. Week 1 Diary <strong>is</strong> placed during the 7-day placement period,</td>
<td><strong>You are unable to contact household to pick up the Week 1 Diary within the 7 days allowed,</strong></td>
<td></td>
<td>The Week 1 Diary is coded Type A, 02, &quot;No One Home.&quot;</td>
</tr>
<tr>
<td>IF</td>
<td>AND IF</td>
<td>AND IF</td>
<td>AND IF</td>
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<tr>
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</tr>
<tr>
<td>7. Week 1 Diary is an interview or noninterview at placement or pick-up,</td>
<td>Week 2 Diary is <strong>not</strong> placed in the 7 days allowed,</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Week 1 Diary is an interview or noninterview at placement or pick-up,</td>
<td>Week 2 Diary is placed in the 7 days allowed,</td>
<td>You are unable to contact household to pick up the Week 2 Diary within the 7 days allowed,</td>
<td></td>
</tr>
<tr>
<td>9. Week 1 Diary is a noninterview at placement,</td>
<td>Week 2 Diary is placed within the 8 through 14th day from the &quot;earliest&quot; placement date for the Week 1 Diary,</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10. Week 1 Diary is a noninterview at placement,</td>
<td>Week 2 Diary is placed within the 8 through 14th day from the &quot;earliest&quot; placement date for the Week 1 Diary,</td>
<td>Week 2 Diary is picked up <strong>on the day following</strong> the 7 day period covered by the diary,</td>
<td>Week 2 Diary is blank or partially complete,</td>
</tr>
<tr>
<td>11. Week 1 Diary is a noninterview at placement,</td>
<td>Week 2 Diary is placed within the 8 through 14th day from the &quot;earliest&quot; placement date for the Week 1 Diary,</td>
<td>Week 2 Diary is picked up within the 7 days allowed, <strong>but not on the day following</strong> the 7 day period covered by the diary,</td>
<td>Week 2 Diary is partially complete,</td>
</tr>
<tr>
<td>12. Week 1 Diary is a noninterview at placement,</td>
<td>Week 2 Diary is placed within the 8 through 14th day from the &quot;earliest&quot; placement date for the Week 1 Diary,</td>
<td>Week 2 Diary is picked up within the 7 days allowed, <strong>but not on the day following</strong> the 7 day period covered by the diary,</td>
<td>Week 2 Diary is blank,</td>
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### CHART FOR INTERVIEW STATUS DETERMINATION — Week 2 Diary
(Continued)

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<th>AND IF</th>
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<td>13. Week 1 Diary is an interview at placement and either an interview or noninterview at pick-up,</td>
<td>Week 2 Diary is placed on the 8th through 14th day after the placement of the Week 1 Diary. Do recall for any days between the end of the Week 1 Diary and placement of Week 2 Diary,</td>
<td>Week 2 Diary is picked up within the 7 days allowed,</td>
<td>Week 2 Diary is complete,</td>
<td>Week 2 Diary is an interview.</td>
</tr>
<tr>
<td>14. Week 1 Diary is an interview at placement and either an interview or noninterview at pick-up,</td>
<td>Week 2 Diary is placed on the 8th through 14th day after the placement of the Week 1 Diary. Do recall for any days between the end of the Week 1 Diary and placement of Week 2 Diary,</td>
<td>Week 2 Diary is picked up on the day following the 7 day period covered by the Diary,</td>
<td>Week 2 Diary is blank or partially complete,</td>
<td>Complete Week 2 Diary through Recall and code as an interview.</td>
</tr>
<tr>
<td>15. Week 1 Diary is an interview at placement and either an interview or noninterview at pick-up,</td>
<td>Week 2 Diary is placed on the 8th through 14th day after the placement of the Week 1 Diary. Do recall for any days between the end of the Week 1 Diary and placement of Week 2 Diary,</td>
<td>Week 2 Diary is picked up within the 7 days allowed, but not on the day following the 7 day period covered by the Diary,</td>
<td>Week 2 Diary is partially complete,</td>
<td>Do not collect any information by Recall. Code the Week 2 Diary as an interview.</td>
</tr>
<tr>
<td>16. Week 1 Diary is an interview at placement and either an interview or noninterview at pick-up,</td>
<td>Week 2 Diary is placed on the 8th through 14th day after the placement of the Week 1 Diary. Do recall for any days between the end of the Week 1 Diary and placement of Week 2 Diary,</td>
<td>Week 2 Diary is picked up within the 7 days allowed, but not on the day following the 7 day period covered by the Diary,</td>
<td>Week 2 Diary is blank,</td>
<td>Week 2 Diary is a noninterview, code 05. Explain in notes.</td>
</tr>
</tbody>
</table>
The Bureau of the Census is conducting the Consumer Expenditure Surveys for the Bureau of Labor Statistics of the U.S. Department of Labor under title 29, United States Code. The surveys’ purpose is to obtain information on what Americans are purchasing in order to update the Consumer Price Index (CPI). All survey information will be used for statistical purposes only.

Any information you provide for this survey is confidential, by law, under title 13, United States Code. Participation in this survey is voluntary and there are no penalties for refusing to answer any question(s). However, your cooperation is extremely important to help insure the completeness and accuracy of these data.

INTRODUCTIONS

(1st visits Quarterly Interview Survey and Diary Survey)

"Good morning. I am (your name) from the United States Bureau of the Census. Here is my identification card. We are conducting a Consumer Expenditure Survey for the Bureau of Labor Statistics. I have some questions I would like to ask you. Did you receive a letter saying someone would call on you?"

(2nd through 5th visits Quarterly Interview Survey)

"Good morning. I am (your name) from the United States Bureau of the Census. Here is my identification card. I was here in (month) to obtain information for the Consumer Expenditure Survey. This is my (number) quarterly visit. I have some questions to ask. Did you receive our letter?"