

QCEW Visiting Researcher Guide

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Administrative Information

Points of Contact

Project Coordinators:

- Jessica Helfand (helfand.jessica@bls.gov; 240.672.5801)
- Mike LoBue (lobue.michael@bls.gov; 202.691.6476)
- Project Coordinators are responsible for maintaining researchers' access to QCEW data, uploading files, and non-disclosure review of output.

Office of Administration:

- Erin Good (good.erin@bls.gov; 202.691.7763)
- The Office of Administration is responsible for maintaining researcher' legal agreements, and processing extensions.

Data Access

Onsite Appointments

Researchers should email their Project Coordinators at least 2 weeks in advance of a desired appointment in order to have a terminal reserved in the Researcher Suite. An appointment should be confirmed prior to making any travel arrangements. Starting October 15, 2017 badge access will no longer be granted to the Postal Square Building or the Researcher Suite. Your Project Coordinators will add your name to the Visitor System for the days on which you have a reservation. Please check in with the guards at the visitor entrance upon arrival at BLS.

The Researcher Suite is available for use during regular business hours, from 8am to 5pm.

Note: If the Federal Government is closed (snow day, furlough, etc.), researchers are not permitted onsite, even if they have a standing appointment.

Passwords

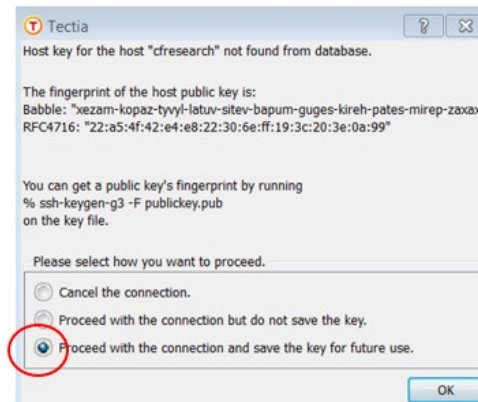
Each researcher has two sets of usernames and passwords: one for Windows, one for LINUX. A Windows password will remain valid for 90 days, and a LINUX password will remain valid for 84 days of activity or 60 inactivity. Researchers should be aware of these periods, and follow the procedures below if passwords have expired.

Before coming to BLS: Researchers must email Project Coordinators - 2 days prior to their appointment in order to have passwords reset. If passwords have expired and are not reset, it may take several hours before access can resume.

While at BLS: If a researcher is "locked out" of an account, they should email or call their Project Coordinator as soon as possible. Do note that it may take several hours before new passwords can be generated.

Research Server

The LINUX server for outside researchers is named *cfresearch*. In order to log into the server, launch Tectia-SSH Terminal and log into *cfresearch* using the username and password provided by your Project Coordinator. Note: upon your first log in you will receive a warning message, please simply click through.



Researchers may choose to use Graphical User Interface (GUI) versions of SAS and STATA on the research server. In order to enable the graphical display, please do the following:

- 1) Enable X11 Tunneling:
 - a. Start Tectia – SSH Terminal, Click Edit->Tectia Connections-> Default Connection->Tunneling tab, Uncheck “Use factory defaults”, click “Tunnel X11 connections”, Click OK
- 3) Launch Exceed
- 4) Log into the *cfresearch* server using Tectia – SSH Terminal
- 5) At the *cfresearch* prompt, type **sas** to launch SAS or **xstata** to launch STATA.

Research Server Uploads

All files are to be funneled through QCEW Project Coordinators. No files may be uploaded directly by researchers. Files are to be emailed to project coordinators prior to an onsite appointment. If files are too large to email, they may be brought into BLS on portable media and uploaded by project coordinators.

Uploading Datasets

Any publicly available data may be provided to the Project Coordinator and uploaded. However, private data sets, such as Compustat and others for purchase, must be included in the scope of the Letter of Agreement or Memorandum of Understanding with the Researcher’s institution.

LINUX Workspace

Researchers are each given a work directory (/OEUS/users/yourusername) where ALL files must be stored. If multiple researchers are collaborating on a project a shared workspace will be provided (/OEUS/users/SHAREDusers). Storage in the home directory (/home/yourusername) or on the computer's hard drive is **prohibited**.

The /OEUS directory is a shared workspace and fills up quickly if researchers are not conscious of conserving space. Researchers should *frequently* clean up their workspace (/OEUS/users/yourusername) and delete all extraneous files. Researchers should also be aware of size restrictions in the SASWORK directory and run programs efficiently.

The Stata work directory is also a shared space, and may become too small. Researchers may designate an alternate Stata workspace through the following steps:

- 1) Create a ".kshrc" file in the home directory with the following two lines:
STATATMP=/OEUS/users/tempdir
export STATATMP
- 2) Log off and log back in to invoke the .kshrc file.

Software

The Research Server is equipped with SAS and STATA. Additional software must be a part of the Letter of Agreement or Memorandum of Understanding with the Researcher's institution.

Characteristics of QCEW Data

Data Source

The data are collected quarterly by Unemployment Insurance Tax agencies in 50 States, the District of Columbia, the Virgin Islands, and Puerto Rico. The data reported include monthly employment and total quarterly wages. The only fields assigned here at BLS are the LDB number, Predecessor and Successor Flags, Date of First Positive Employment, and Date of Last Positive Employment. The researcher sever is updated annually, in December of each year.

Data Identifiers: LDB Number, EIN, UI Account Number, and Reporting Unit Number

The LDB number is a unique identifier used to construct BLS sample frames and the BED time series. The UI account Number and Reporting Unit Numbers are assigned by the State. Combined with the State FIPS, UI, and RUN, can also create a unique identifier 17 digit identifier. EIN is a federally assigned tax code. Establishments can be aggregated by EIN to construct Firm data.

Fed-State Cooperative Program

QCEW is a Fed-State cooperative program, wherein the States are the ultimate owners of the data. While most States grant blanket access for research project, several approval projects on a case by cases basis. Below is a listing of the non-blanket States for Fiscal Year 2020:

Alaska	Massachusetts	Oregon
Colorado	Michigan	Pennsylvania
Florida	Mississippi	Rhode Island
Hawaii	Nebraska	Vermont
Idaho	New Hampshire	Washington
Illinois	New York	Wyoming
Kentucky	North Carolina	
Louisiana	Ohio	

Static Fields v. Dynamic Fields

All data elements are collected quarterly. However, administrative fields are considered Static and are stored only once. Static fields reflect the most recent submission from the state. Only Dynamic fields are stored quarterly. *Note: one-to-one predecessor/successor transactions where the LDB is maintained across the administrative UI change) only the successor's Static data will be stored.*

Dynamic Data Elements:

- Year/Quarter
- UI Account Number
- Reporting Unit Number
- State FIPS
- County
- Town
- MSA Code
- NAICS
- SIC (for historical data)
- Employer Identification Number (EIN)
- Multiple Establishment Employer Indicator (MEEI)
- Ownership Code
- Month 1 Employment
- Month 1 Employment Indicator
- Month 2 Employment
- Month 2 Employment Indicator

- Month 3 Employment
- Month 3 Employment Indicator
- Total Quarterly Wages
- Total Wage Indicator
- Organization Type
- Latitude*
- Longitude*
- Census Block*

*Restrictions apply to Geocode data, see below

Static Data Elements:

- Legal Name
- Trade Name
- Setup Date
- Initial Liability Date
- End of Liability Date
- Reactivation Date

Geocode Data

Geocodes are integrated into the quarterly data files and include latitude, longitude, and Census Block. The Census Block is a 15 digit field comprised of a 2 digit State FIPs code, 3 digit county code assigned by the geocoding software, 6 digit tract code, 1 digit block code, and a 3 digit detailed block classification. Portions of this field may or may not be assigned, based on the record's Physical Location Address. With the exceptions listed below, geocodes are available for 1998/2, 1999/2, 2000/2, 2001/2, 2002/2, and quarterly from 2003 forward.

The following States and quarters have limited Geocodes:

KY 2009/4	PR 2009/1 – 2009/2
MI 1998/2	TX 2001/2 – 2010/3
NJ 1998/2 – 1999/2	VI 1998/2
NY 2008/1 – 2008/4	VI 2003/1 – 2007/4
PR 2003/1 – 2007/4	VI 2009/1 – 2009/2

Predecessor and Successor Flags

Predecessor/Successor flags are assigned at BLS for the purpose of tracking mergers, spinoffs, consolidations, etc. They are used as a set of odd/even number, where the odd number is assigned to the predecessor(s) and the even number to the successor(s). See Appendix B: Breakout / Consolidation Flags in the QCEW Code Explanations document for more information.

Non-Disclosure Review

Non-disclosure review is required for any type of output to be taken from the BLS. Non-disclosure review ensures that researcher outputs will not jeopardize the confidentiality of QCEW microdata. Unless otherwise specified in the researchers' Letter of Agreement or Memorandum of Understanding, researchers are limited to regression output and summary statistics. No tabular output, employment totals, or wage totals are permitted. Additionally, a sufficient number of observations must be used in all regression analysis, satisfying the 10/75 rule, where there must be at least 10 observations and no single observation may make up 75% or more of the of the cells employment. Researchers should be aware that BLS actively discourages intermediate and iterative outputs. Multiple versions of output increase the risk of disclosure and may compromise final results. Researchers should be mindful of this restriction and only request output towards the end of their project.

To begin the process, researchers should alert the Project Coordinator that output is ready for non-disclosure review, directing them to a summary document and the location of the files to be reviewed. This summary document should contain a description of each file requested, including, but not limited to, which QCEW data elements were used, the number of observations used to produce results, explanation of new data elements, and any conditions limiting the scope of data used (such as time period, geography, industry, or employment size).

Researchers should allow ample time for this review process. While it will typically take 1-2 weeks, the non-disclosure review may take as long as 2 months based on resource constraints. Upon completion of the review, passing outputs will be emailed to the researcher. If output fails non-disclosure review, the researcher will have the opportunity to revise the files and request a second review.

Researchers are required to include the following disclaimer in any published works using these data: *This research was conducted with restricted access to Bureau of Labor Statistics (BLS) data. The views expressed here do not necessarily reflect the views of the BLS or the U.S. government.*

Project Amendments

Project Extensions

Project extensions are granted on a case by case basis. Researchers may begin the extension application process 3-6 months prior to their agreement's expiration. Justification for the extension, as well as a summary of work to be completed will be required. If Researchers have completed their work, but are in the process of finalizing their publications, they may enter a referee comments period for 1 year after their agreement has expired. During this year, a researcher may then apply for a 3 month timeframe to make minor revisions to their outputs.

Note: Arrangement for a project extensions and referee comments period must be made through the Office of Administration prior to the project's expiration.

Transferring Sponsoring Institutions

Researchers may transfer institutions, but some restrictions apply. Please refer to the Institution Transfer Policy for details.

Safety

Building Evacuation

In the event of a building evacuation, researchers are to quickly and safely leave the building, and join the employees of Room 4945 in Capitol Hill Park.

- Exit Room 4955 and head towards Stairway #5, located 108ft to the right of the office. Follow the directions of emergency monitors, who will be wearing red baseball caps that say Postal Square OEP Monitor on the brim.
- Exit the building from the first floor at the corner of North Capitol Street & Massachusetts Avenue. From the ground floor, exit onto North Capitol Street (follow sign). Exit through the stairway by suite 1950.
- Follow the emergency monitors to Capitol Hill Park which is located 620ft from the building at the corner of Massachusetts and Louisiana Avenues, N.E.

Shelter In Place

During a shelter in place or a shelter in place drill, researchers in room 4955 are to go to room 4930.