PSID-SHELF USER GUIDE AND CODEBOOK, 1968–2021, BETA RELEASE

The Panel Study of Income Dynamics–Social, Health, and Economic Longitudinal File (PSID-SHELF)

PSID-SHELF Data Documentation 2025-01

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Davis Daumler, Esther Friedman, Fabian T. Pfeffer

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1 Introduction to PSID-SHELF

1.1 What is PSID-SHELF?

The **Panel Study of Income Dynamics–Social, Health, and Economic Longitudinal File (PSID-SHELF)** provides an easy-to-use and harmonized longitudinal file for the Panel Study of Income Dynamics (PSID), the longest-running nationally representative household panel survey in the world.

The first major benefit of PSID-SHELF is that it provides users with a longitudinal data file that features the complete sample of the PSID's multigenerational panel. The current version of PSID-SHELF includes 42 waves of survey data, ranging from 1968 to 2021. Every individual who has ever been observed in the PSID Main Study is included in PSID-SHELF. There are over 8,000 sample families, comprising more than 900,000 observations from roughly 53,000 sample members (and an additional 30,000 nonsample individuals who have ever lived in a PSID family unit).

The second major benefit of PSID-SHELF is that it features a novel set of harmonized measures on a wide range of substantive topics, including: (1) **social characteristics** (e.g., demographics, family type, education, race and ethnicity); (2) **health characteristics** (e.g., chronic conditions, COVID-19, dementia, disability); (3) **economic characteristics** (e.g., earnings, family income, occupations, wealth)—as well as a list of the PSID's essential administrative variables (e.g., survey identifiers, panel status, sample weights, household relationship records). Consequently, PSID-SHELF covers some of the most central variables in the PSID that have been collected for up to five decades.

PSID-SHELF can be used as a standalone data file, or it can easily be merged with other PSID data products to add additional public-use variables, by linking variables to a participant's individual and family unit identifiers. The harmonized longitudinal file accentuates the PSID's strengths through its **household panel structure** that follows the same families over multiple decades and its **multigenerational genealogical design** that follows the descendants of PSID families that were originally sampled in 1968, with immigrant refresher samples in 1997–1999 and 2017–2019.

Although the PSID strives to ensure longitudinally consistent measurement, there are a number of variables that have changed across waves (e.g., because of new code frames, top-codes, question splitting, or other changes to the survey interview). But data harmonization, by necessity, involves analytic decisions that users may or may not agree with. These decisions are described at a high level in the *PSID-SHELF User Guide and Codebook*, but only a close review of the construction files that were used to generate PSID-SHELF can fully reveal each analytic decision. The Stata code underlying PSID-SHELF is publicly available not only to allow for such review but also to encourage users,

as they become more comfortable with PSID, to use and alter the full code or selected code snippets for their own analytic purposes.

Despite multiple code reviews, it is possible that the files used to produce PSID-SHELF contain errors. As such, we encourage users to review the code carefully. If identified, please report any mistakes or errors to us (psidshelf.help@umich.edu). The authors wish to underscore that PSID-SHELF is currently being shared as a data product, in beta, and users are responsible for any errors arising from the provided code and files.

1.2 How can PSID-SHELF be used?

The data file for PSID-SHELF can be used on its own, jointly with the PSID Main Study, or sequentially whereby PSID-SHELF is used to gain experience before graduating to the PSID Main Study.

By providing a series of harmonized measures, PSID-SHELF serves as an easy introduction and starting point for researchers who wish to begin using the PSID. It provides an efficient way to learn PSID's complex data structure and to quickly select an analytic sample of observations to gain an initial sense of analytic sample sizes. With a large selection of social, health, and economic characteristics, PSID-SHELF can in some instances serve as **a standalone file for entry-level users**.

For intermediate and advanced users, PSID-SHELF can also serve as **a baseline file for data linkage** to add other variables from the PSID Main Study or its wide range of Supplementary Studies. Alternatively, an experienced user may be interested in selecting one of PSID-SHELF's harmonized variables to add to their own analytic files.

Furthermore, the construction files that generate PSID-SHELF are included with the data files, to copy and adjust PSID-SHELF in line with a particular user's needs, to recreate one of the PSID-SHELF variables based on different analytic decisions, to harmonize new measures following a similar process, or to alter and recreate the entire PSID-SHELF.

1.3 Who maintains PSID-SHELF?

The beta release of PSID-SHELF is currently a user-initiated data product that is published to Open ICPSR.

The *PSID-SHELF User Guide and Codebook* is not a formal PSID product, but it can be used in conjunction with other PSID documentation. This manual can serve as a gentle introduction to the PSID and PSID-SHELF, but it cannot replace a close reading of the PSID-2021 Main Interview User Manual: Release 2023 or other documentation that can be found at the PSID website.

The current version of the *PSID-SHELF User Guide and Codebook* was authored by Davis Daumler, Esther Friedman, and Fabian Pfeffer. Analytic contributions to the current version of the PSID-SHELF data were provided by Patricia Andreski, Davis Daumler, Esther Friedman, Florian Hertel, Fabian Pfeffer, Mehmet Zahid Samancioglu, Andreja Siliunas, and Brittany Vasquez.

1.4 How to cite PSID-SHELF

Researchers who download PSID-SHELF and use the data, measures, and/or code should cite both **PSID-SHELF** and the **PSID Main Study**, as required by the PSID's user agreement. Recommended citations for these two datasets are included on p. 70 of this document. There is also a recommended citation for users who wish to cite the *PSID-SHELF User Guide and Codebook*.

1.5 When was PSID-SHELF released?

The current version of PSID-SHELF (Data Release 2025-01) was uploaded to Open ICPSR in February 2025.

PSID-SHELF was generated using publicly available data from the PSID Main Study, which were downloaded from the PSID Data Center on November 16, 2023.

PSID-SHELF will continue to be expanded and updated.

1.6 What is new in the latest version of PSID-SHELF?

There were three major changes to PSID-SHELF in Data Release 2025-01.

First, PSID-SHELF was updated to include the latest version of the PSID's family files (1968–2021) and cross-year individual file (1968–2021, release number 3). PSID-SHELF now includes all 42 waves of the PSID Main Study through to 2021.

Second, the latest version of PSID-SHELF has introduced measures on the topics of health, financial expenditures, and time-use:

Third, there were minor changes made to many of PSID-SHELF's social and economic characteristics to improve cross-wave consistency and clarity. For example, there were a number of changes to variable names and improved consistency across top-codes and missing values. **It is always recommended to use the latest versions of both the PSID Main Study and PSID-SHELF**, because small changes are sometimes made to reflect the most up-to-date information about survey participants.

2 Survey Identifiers

2.1 Survey identifiers

PSID-SHELF provides a number of survey identifiers that can be used (1) to uniquely identify any individual or family unit who enters the PSID; (2) to determine the current status of an individual within a particular family unit; and (3) to determine the specific subsample through which a PSID sample family joined the survey.

2.1.1 Individual and family unit identifiers

There are several identifiers that are used to track individuals and families over time. In some cases, these identifiers are consistent across survey years (i.e., they can be used to track the same individual over time); and, in other cases, these identifiers are time-varying and specific to a particular survey year (i.e., they can be used to track changes to an individual's living arrangements or survey participation).

First, the unique ID is a single measure that is used to identify anyone who has been mentioned in the PSID survey interview, including every individual who has ever been observed in a PSID family unit (`ID`). This measure can be used to uniquely identify every individual when the data is in wide format (see p. 51 for an explanation). The unique ID, in combination with the survey year, can be used to uniquely identify every year-specific observation of an individual when the data is in long format (see p. 51).[1]

Second, the aforementioned survey year indicator represents the year in which the PSID survey interview was completed by the respondent (`YEAR`). While most questions ask a respondent about the individual and family characteristics at the time of survey, some questions ask a respondent about previous years. For example, the PSID collects income based on the tax year prior to each survey wave (e.g., income values in the 2015 wave are based on the family's taxable income from the 2014 tax year).

Third, each individual has an original 1968 family unit ID that is used to identify the original sample family that the individual comes from (`LINEAGE`). Even when a panel family was not present in the original 1968 wave (i.e., because they were added to the panel through a subsequent subsample), these newly added families will still be assigned an original 1968 family unit ID.

The complete list of Survey Identifier Variables can be found on p. 52.

[1] An individual's unique ID can be generated by multiplying their 1968 family unit ID by 1000 and adding their person number: i.e., equal to `[ (LINEAGE x 1000) + PNUM ]`.

Fourth, within every family unit, an individual is assigned a person number that is unique to each 1968 family unit ID (PNUM). In other words, it is impossible for two individuals to (a) be from the same lineage (i.e., who have the same 1968 family unit IDs) *and* (b) have identical person numbers.

Fifth, in each survey year, every individual who belongs to the same family unit will be assigned a wave-specific family unit ID (FUID). The family unit is defined as a group of people living together as a family; and they are almost always related by blood, marriage, or adoption. Please note that family unit IDs are not consistent across waves. Additionally, two members of the same family unit (e.g., in 2015) may not have the same family unit during the next wave (e.g., in 2017), if they no longer live in the same family unit due to a splitoff (e.g., change in living arrangements, legal status, or the formation of an independent family unit).

Sixth, in each survey year, every individual who lives in the same physical lodging will be assigned a wave-specific household dwelling ID (HHDID). The household dwelling can be a house, a townhouse, an apartment, a room in a boarding house, or even a tent or a car. Not everyone who lives in the same household dwelling is automatically a member of the family unit. For example, other people may live in the household dwelling temporarily but do not meet the criteria of relatedness and economic integration that defines a family unit. (The PSID interviews are concerned with the members of PSID family units.) In some cases, a household dwelling might include two or more PSID family units—all of whom live in the same physical lodging, whereby each family unit contains at least one individual who is eligible to be followed by the PSID.

Seventh, PSID-SHELF includes a time-varying indicator that identifies the individual who completed the survey interview on behalf of a family unit during the current survey wave (RESPONDENT). The variable has three potential values (reference person; spouse/partner; other person). In the majority of family units, the survey interview is completed by the person with the most financial responsibility for the family unit (i.e., the reference person). However, sometimes the respondent can either be the spouse/partner of the reference person—or someone else (e.g., another family unit member or a proxy respondent who was not a member of the family unit). An extended version of the variable is also provided, with an expanded number of categories (RESPONDENT_EXT). The extended values are listed below, with a crosswalk that identifies equivalent values between the extended and non-extended versions of the variable.

RESPONDENT		RESPONDENT_EXT	
1	Ref person	101	Ref person (Head)
		102	Ref person (Current Head)
		103	Ref person (Current Reference Person)
2	Spouse/partner	201	Spouse/partner (Wife responding for self)
		202	Spouse/partner (Wife responding for self, Wife considered Head)
		203	Spouse/partner (Wife)
		204	Spouse/partner (Wife/"Wife")
		205	Spouse/partner (Wife or new Wife)
		206	Spouse/partner ("Wife" or new "Wife")

		207	Spouse/partner (Partner or new partner)
		208	Spouse/partner (Spouse or new spouse)
		251	Spouse/partner (Wife responding for husband)
8	Other person	801	Other person (Other)
		802	Other person (Someone other than Head or Wife)
		803	Other person (Other than Head or Wife)
		804	Other person (Someone other than Head or Wife/"Wife")
		851	Other person (Other FU member)
		861	Other person (Proxy R, not a member of this FU)
9	Unknown person	999	Unknown person (NA)

Finally, there is a binary indicator, based on the respondent variable, which provides a time-varying indicator of whether a particular individual is the respondent who completed the survey interview during the current wave (`RINDIV`). The variable has two potential values (not respondent; respondent). This individual-level respondent variable is available from 1969 to 1984 and it was reintroduced in 1999 (until present).

2.1.2 Family unit membership

PSID-SHELF includes two sets of measures of an individual's status in the family unit. Knowing who the reference person is—and the relationship of the reference person to every other member of the family unit—is crucial because the PSID treats the reference person (and their spouse/partner) as the focal point for most questions in the survey interview. A smaller number of questions are collected about children and other family unit members (or "OFUMs," as they are frequently referred to in the official documentation for the PSID Main Study).

First, the relationship to reference person provides a time-varying indicator of the reference person's relationship to each individual who lives in the family unit (`REL`). The variable has four potential values (reference person; spouse/partner of reference person; child of reference person; other family unit member). An extended version of the variable is also provided, with an expanded number of categories (`REL_EXT`). The extended values are listed below, with a crosswalk that identifies equivalent values between the extended and non-extended versions of the variable.

`REL`		`REL_EXT`	
1	Ref person	100	Ref person
2	Spouse/partner of ref person	201	Spouse/partner of ref person (Legal spouse of RP)
		202	Spouse/partner of ref person (Cohabiting partner of RP)
		203	Spouse/partner of ref person (Uncooperative legal spouse of RP)
		204	Spouse/partner of ref person (Uncooperative cohabiting partner of RP)
3	Child of ref person	301	Child of ref person (Child of RP, born or adopted)
		302	Child of ref person (Step-child of RP, child of legal spouse)
		303	Child of ref person (Child of cohabiting partner)

4	Other fam unit member	400	Other fam unit member (First-year cohabiting partner of RP)
		401	Other fam unit member (Child of first-year cohabiting partner)
		411	Other fam unit member (Foster child of RP)
		412	Other fam unit member (Child-in-law of RP, spouse of child incl step)
		421	Other fam unit member (Parent of RP incl step)
		422	Other fam unit member (Parent-in-law of RP, parent of legal spouse)
		423	Other fam unit member (Parent of cohabiting partner)
		431	Other fam unit member (Grandchild of RP/legal spouse)
		432	Other fam unit member (Great-grandchild of RP/legal spouse)
		441	Other fam unit member (Grandparent of RP)
		442	Other fam unit member (Grandparent of legal spouse)
		443	Other fam unit member (Great-grandparent of RP)
		444	Other fam unit member (Great-grandparent of legal spouse)
		451	Other fam unit member (Sibling of RP incl step/half)
		452	Other fam unit member (Sibling-in-law of RP, sibling of legal spouse)
		453	Other fam unit member (Sibling of cohabiting partner)
		454	Other fam unit member (Niece/nephew of RP)
		455	Other fam unit member (Niece/nephew of legal spouse)
		456	Other fam unit member (Cousin of RP)
		457	Other fam unit member (Cousin of legal spouse)
		458	Other fam unit member (Aunt/uncle of RP)
		459	Other fam unit member (Aunt/uncle of legal spouse)
		480	Other fam unit member (Other relative of unspecified person)
		481	Other fam unit member (Other relative of RP)
		482	Other fam unit member (Other relative of legal spouse)
		483	Other fam unit member (Other relative of cohabiting partner)
		490	Other fam unit member (Other nonrelative or unspecified relationship)

Second, there is a binary indicator, based on the relationship to reference person, which provides a time-varying indicator of whether a particular individual is either the reference person or the spouse/partner during the current survey year (`REFCOUPLE`). The variable has two potential values (not in reference couple; in reference couple).

The reference couple identifier is extremely important, because the majority of information that is collected about a family unit can be attributed directly to the reference person and their spouse/partner. For example, a user who wishes to investigate the individual-level returns to homeownership may want to limit their analyses to observations of housing wealth in years that an individual is the reference person or spouse/partner. First, homeownership and housing wealth are measured at the level of the family unit, based on interview questions that focus on the reference couple. Second, a coresident adult who is not in the reference couple is not typically (a) listed on the property title, (b) subject to the terms of the mortgage, or (c) a beneficiary from any future sale of the property. Consequently, it may not be wise to attribute certain family-level characteristics to an adult family member who is not in the reference couple, since most family-level information is collected about the reference person and spouse/partner.

2.1.3 Sample membership

The PSID follows a complex survey design that consists of five different subsamples.

In 1968, the original PSID sample consisted of 4,802 families, which were drawn from two different subsamples: (1) a nationally representative sample of 2,930 families designed by the Survey Research Center at the University of Michigan (i.e., the SRC sample); and (2) an oversample of 1,872 low-income families from the Survey of Economic Opportunity designed by the U.S. Census Bureau (i.e., the Census/SEO sample). The low-income oversample was included to facilitate the investigation of poverty-related issues. When combined, these SRC and Census/SEO samples constitute a national probability sample of families living in the United States, as of 1968.

Between 1990 and 1992, the PSID added 2,308 Latino families, which included individuals who were originally from Mexico, Puerto Rico, and Cuba. Although this sample represented three major groups of immigrants, it did not fully represent all of the immigrants to the United States from 1969 to 1990. Because of this crucial shortcoming, and a lack of sufficient funding, the Latino sample was dropped after 1995.

Between 1997 and 1999, the PSID added a nationally representative sample of 511 families that included individuals who (a) immigrated to the United States from 1969 to 1997, *and* (b) are not married to a person who was living in the United States in 1968; or, alternatively, (c) were children who were born after 1968 to parents who were not living in the United States in 1968.

Between 2017 and 2019, the PSID added a nationally representative of 481 families that included at least one member of the reference couple (i.e., either the reference person or spouse/partner) who (a) immigrated to the United States from 1998 to 2016, when the screening effort took place; or, alternatively, (b) was a child who was born after 1997 to parents who were not living in the United States in 1997. The purpose of the immigrant refresher samples was to ensure that the PSID remained representative of the current U.S. population, as of the addition of the most recent refresher sample.

PSID-SHELF includes a single measure of sample membership that identifies the specific subsample through which a PSID sample family joined the survey (`SAMPLE`). The variable has five potential values, which are listed below.

`SAMPLE`

1	Main sample (SRC)	1968–present
2	Main sample (Census/SEO)	1968–present
3	Latino sample (1990/1992, ended 1995)	1990–1995
4	Immigrant refresher sample (1997/1999)	1997–present
5	Immigrant refresher sample (2017/2019)	2017–present

A family unit can be comprised of both sample persons and nonsample persons. A sample person is an official member of the panel, and they are eligible to be followed (by the survey) if they experience a change in living arrangements. A nonsample person is someone who joined the survey by moving in with a sample person, but they are not

typically eligible to be followed (by the survey) if they are no longer living with at least one sample person in their family unit.[2]

The PSID differentiates between four types of sample persons. Each type refers to the way in which an individual was added to the panel. (1) An "original" sample person is someone who was present during the first possible year that a sample family joined the survey. (2) A "born-in" sample person is a child who descended from a sample parent and was observed in the first survey year after they were born. (3) A "moved-in" sample person is a child who descended from a sample parent but was not born into the sample—and moved into a PSID family unit in a later year. (4) A "joint inclusion" sample person refers to an individual who is from one of three subsamples (main sample/SRC, main sample/SEO, or immigrant refresher sample/1997–99) and whose spouse/partner met the criteria for the 2017–19 immigrant refresher. These family units, effectively, had an increased probability of being sampled (i.e., as part of one of the three initial subsamples *and* as part of the second immigrant refresher sample in 2017–19). Therefore, the sample weights for these families were adjusted, as of 2017, to account for each family's increased probability of selection into the panel.[3]

PSID-SHELF includes a single measure for whether an individual is a sample person and considered to be an official member of the panel (`SAMPSTAT`). The variable has five potential values (nonsample person; sample person: original; sample person: born-in; sample person: moved-in; sample person: joint inclusion). An extended version of the variable is also provided, with an expanded number of categories (`SAMPSTAT_EXT`). The extended values are listed below, with a crosswalk that identifies equivalent values between the extended and non-extended versions of the variable.

`SAMPSTAT`		`SAMPSTAT_EXT`	
0	Nonsample person	001	Nonsample person: Not followable
		002	Nonsample person: Followable elderly, age 65 or older (1990–1995)
		003	Nonsample person: Followable parent, live with sample child under age 25 (1994–2003)
1	Sample person: Original	100	Sample person: Original
2	Sample person: Born-in	200	Sample person: Born-in
3	Sample person: Moved-in	300	Sample person: Moved-in
4	Sample person: Joint inclusion	400	Sample person: Joint inclusion

2.2 Panel status

PSID-SHELF includes a series of variables that identify the current status of every individual who has ever been observed in a PSID sample family (i.e., 1968 until present).

[2] In some cases, a nonsample person is eligible to be followed, even though they are not an official member of the panel. For more detail about the PSID's sample following rules, please consult p. 12 of the PSID-2021 Main Interview User Manual: Release 2023.

[3] For more detail about the PSID's joint inclusion sample, please consult p. 11 of the PSID-2021 Main Interview User Manual: Release 2023.

First, there is another time-varying indicator that identifies whether an individual is an active member of the panel or, for individuals who are not current members of a family unit, the variable provides the reason for survey nonresponse (`RESPONSE`). The variable has 10 potential values, where the assigned value provides a detailed description of an individual's current status in the panel. A value of 0 denotes that an individual has an "active response" during the current survey year (i.e., they are a current member of a family unit). A value between 2 and 8 denotes that an individual is "nonresponse" during the current survey year, after having previously been a part of a PSID family unit during a previous wave. A value of 9 denotes that an individual's survey response is "not applicable" during the current survey year, because the individual has not yet entered the survey (i.e., they have not yet been born, they have not yet moved into a PSID sample family, or they are a part of a subsample that has not yet been added to the survey). An extended version of the variable is also provided, with an expanded number of categories (`RESPONSE_EXT`). The extended values are listed below, with a crosswalk that identifies equivalent values between the extended and non-extended versions of the variable.

`RESPONSE`		`RESPONSE_EXT`	
0	Active response: Ind is current member of fam unit at time of interview	000	Active response: Ind is current member of fam unit at time of interview
1	Nonresponse: Ind in an institution (e.g., armed forces, educational, prison)	101	Nonresponse: Ind in an institution (Armed forces)
		102	Nonresponse: Ind in an institution (Educational)
		103	Nonresponse: Ind in an institution (Health care facility)
		104	Nonresponse: Ind in an institution (Jail or prison)
		105	Nonresponse: Ind in an institution (Misc other type or unknown)
2	Nonresponse: Ind unavailable after life event (e.g., moved out, adopted, disability)	201	Nonresponse: Ind unavailable after life event (Unable to cooperate because of disability)
		202	Nonresponse: Ind unavailable after life event (Adopted by unrelated persons, became nonsample)
		203	Nonresponse: Ind unavailable after life event (Moved out, eligible to be followed)
		204	Nonresponse: Ind unavailable after life event (Moved out, not eligible to be followed)
3	Nonresponse: Ind died since previous wave or after becoming nonresponse in a prior year	300	Nonresponse: Ind died since previous wave or after becoming nonresponse in a prior year
4	Nonresponse: Refusal (e.g., panel withdrawal, unknown reason)	400	Nonresponse: Refusal (Unknown reason, i.e., DK/NA)
		401	Nonresponse: Refusal (Declined wave)
		402	Nonresponse: Refusal (No future contact)
		403	Nonresponse: Refusal (Withdrew by contacting study or IRB)

5	Nonresponse: Logistics (e.g., lost contact, budget, error, status)	501 Nonresponse: Logistics (Lost: No one home during interview period) 502 Nonresponse: Logistics (Lost: Contact with family member but not appropriate respondent) 503 Nonresponse: Logistics (Lost: Inability to locate any member of FU) 504 Nonresponse: Logistics (Lost: Fam unit too far away for interviewer contact) 505 Nonresponse: Logistics (Lost: Insufficient contact information for recontact) 511 Nonresponse: Logistics (Budget: Staff decision discontinue contact efforts due to budget/time) 512 Nonresponse: Logistics (Budget: Latino recontact only, deliberately not followed) 521 Nonresponse: Logistics (Error: Ind was followed, discovered to be nonsample) 522 Nonresponse: Logistics (Error: Ind should have been followed but was not) 523 Nonresponse: Logistics (Error: Ind included in multiple panel families, this record is erronerous) 524 Nonresponse: Logistics (Error: Ind never existed or never actually lived in FU) 525 Nonresponse: Logistics (Error: Miscellaneous office error) 590 Nonresponse: Logistics (Status: Nonsample parent became eligible, followability determined before wave)
6	Nonresponse: Nonsample eligibility (determined ineligible or no longer eligible)	611 Nonresponse: Nonsample eligibility (Inst: Sample member joined armed forces) 612 Nonresponse: Nonsample eligibility (Inst: Sample member entered educ institution) 613 Nonresponse: Nonsample eligibility (Inst: Sample member entered health care facility) 614 Nonresponse: Nonsample eligibility (Inst: Sample member went to jail or prison) 615 Nonresponse: Nonsample eligibility (Inst: Sample member entered misc other institution) 621 Nonresponse: Nonsample eligibility (Unavail: Sample member disability) 622 Nonresponse: Nonsample eligibility (Unavail: All sample members moved out) 630 Nonresponse: Nonsample eligibility (Died: Sample member died) 640 Nonresponse: Nonsample eligibility (Refusal: Sample member refused to participate) 651 Nonresponse: Nonsample eligibility (Logistics: Change to nonsample parent of sample child) 652 Nonresponse: Nonsample eligibility (Logistics: Change due to logistics)

		653	Nonresponse: Nonsample eligibility (Logistics: Nonsample elderly Ind was followed)
7	Nonresponse: Sample drop (1996: Latino sample, 1997: One-third of main/SEO sample)	700	Nonresponse: Sample drop (1996: Latino sample, 1997: One-third of main/Census sample)
8	Nonresponse: No interview after nonresponse in previous wave, not selected for recontact	800	Nonresponse: No interview after nonresponse in previous wave, not selected for recontact
9	Not applicable: Ind has not yet entered survey (not born, not moved in, or sample added in subsequent year)	900	Not applicable: Ind has not yet entered survey (not born, not moved in, or sample added in subsequent year)

Second, an administrative variable is generated for each family unit, called the sequence number, which the PSID assigns to every individual who is mentioned or asked about in the PSID survey interview (`SEQNUM`). This variable ranges from 0 to 89, where the assigned value allows the user to identify the specific status of an individual during the corresponding survey year. A value of 0 denotes that an individual is not associated with any family unit during the current survey year. A value between 1 and 20 denotes that an individual is a member of a current family unit at the time of interview (where a value of 1 is always assigned to the family unit's current reference person). A value between 51 and 59 denotes that an individual is in an institution at the time of interview. A value between 71 and 80 denotes that an individual has moved out of the family unit (or out of an institution) and formed their own independent family unit by the interview date. A value between 81 and 89 denotes that an individual was living during the previous survey year but died by the interview date.

Third, there are three time-varying indicators that identify the current status of individuals who are currently associated with (or have historically been associated with) a particular family unit. These variables are generated from the PSID's sequence number, based on the different meanings of each sequence number. (1) There is a binary indicator that specifies whether an individual is a current member of a PSID family unit during the current survey year (`PANEL_CURRENT`). This variable has two potential values (not a current member of family unit; current member of family unit). (2) There is a categorical indicator that specifies whether an individual is currently associated with a family unit but lives in an institution at the time of the survey interview (`PANEL_INST`). This variable has six potential values (does not live in an institution; armed forces; educational institution; health care facility; jail or prison; other institution or unknown institution). (3) There is a binary indicator that specifies whether an individual who was formerly associated with a family unit has now moved out of a family unit or institution and established their own independent family since the most recent survey interview (`PANEL_MOVE`). This variable has two potential values (did not move out of family unit; moved out of family unit).

In 1997, one-third of the Census/SEO subsample was randomly dropped from the PSID's main sample due to budgetary reasons. However, a selection of these dropped family units were subsequently reinstated to the panel, in order to increase the sample size of the 1997 Child Development Supplement (CDS). The CDS is a component of the PSID that

complements the PSID Main Study, by collecting extensive child-specific developmental data for any family units that have children under the age of 13. Therefore, the 1997 reinstatement of dropped family units introduced an increased probability of retention in the panel for every PSID family unit that had at least one child who was under the age of 13 in 1997.

Fourth, there are three variables that PSID-SHELF has generated to facilitate the identification of family units that were affected by the 1997 sample drop. (1) There is one summary measure that identifies every family unit's status after the 1997 Census/SEO sample drop as of the most recent survey year (`PANEL_DROP_STAT`). The variable has three potential values (never dropped; dropped and never reinstated; dropped and reinstated). (2) There is also a time-varying indicator of whether a current family unit was reinstated from the 1997 Census/SEO sample drop (`PANEL_DROP_REIN`). The variable has two potential values (not reinstated; reinstated). (3) Finally, there is a time-varying indicator of whether a current family unit includes any individuals who were members of a 1997 family unit that had a child who was eligible for the 1997 CDS (`PANEL_REIN_ELIG`). This variable has two potential values (no current individuals who were in a 1997 family unit with a CDS-eligible child; at least one current individual who was in a 1997 family unit with a CDS-eligible child).[4]

2.3 Sample weights and complex survey design

The PSID uses sample weights to account for the differential probabilities of selection into the panel—due to the PSID's complex survey design, its multiple subsamples, and panel attrition. When sample weights are used, the PSID provides a nationally representative portrait of the noninstitutionalized population of the United States.

PSID-SHELF provides a primary set of sample weights that are available in every survey year: (1) family longitudinal weights (`FW`) and individual longitudinal weights (`IW`). While the family longitudinal weights are calculated at the level of the family unit (and assigned to every current member of the family unit), the individual longitudinal weights are only assigned to sample persons (i.e., nonsample persons are not assigned an individual weight).

Between 1990 and 1995, PSID-SHELF provided an additional two sets of sample weights. (2) For analyses that *combine* members of the original samples with members of the Latino sample, users should select the sample weights that were designed for the joint estimation of the Latino and main samples (`FW_LATIN_MAIN`, `IW_LATIN_MAIN`). (3) For analyses that *solely* examine the members of the Latino sample (i.e., analyses that do not include any individual from the PSID's main samples), users should select the sample weights that were designed for the exclusive estimation of the Latino sample (`FW_LATIN_ONLY`,

[4] In select analyses, this time-varying indicator (for the presence of any individuals who was a member of a 1997 family unit with a CDS-eligible child) can be used as a control variable or as a weighting adjustment to account for differential probabilities of sample inclusion, to adjust for the disproportionate reinstatement of families with at least one child under the age of 13. Please consult the PSID Technical Series Paper written by Freedman and Schoeni (2016), for more detail about the partial reinstatement of families after the 1997 Census/SEO sample drop and its implications for selective fertility.

IW_LATIN_ONLY). Finally, for analyses that *only* include the PSID's original samples (i.e., SRC and Census/SEO), users should continue to select the default family and individual longitudinal weights (i.e., FW and IW).

In 1997, the PSID introduced a fourth set of sample weights: (4) family cross-sectional weights (FW_CROSS) and individual cross-sectional weights (IW_CROSS). The family cross-sectional weights are available from 1997 to 2003 and, after a 12-year hiatus, from 2015 until present; and the individual cross-sectional weights are available from 1997 until present, without interruption. The benefits of using the PSID's cross-sectional weights are two-fold. First, the individual cross-sectional weights are assigned to both sample *and* nonsample persons (unlike the individual longitudinal weights, which are only assigned to sample persons). This means that the cross-sectional weights permit the user to take advantage of all available data for individual-level analyses. Second, the cross-sectional weights are calibrated to the country's current population characteristics, based on the Current Population Survey (CPS) or the American Community Survey (ACS).[5] By accounting for year-to-year changes to population characteristics, the calibrating procedure also serves as an adjustment for the PSID's non-coverage of immigrant populations who entered the United States after 2017 (Chang et al. 2023). By contrast, the PSID's longitudinal weights are not calibrated at each wave against external, nationally representative population estimates.

The PSID's longitudinal weights should be used for any analysis that includes information from two or more waves of data. Additionally, a user who is interested in reporting a time series of repeated cross-sectional estimates should consider using the longitudinal weight in each wave, due to the consistency in the methodology used to derive the longitudinal weights across survey years. On the other hand, the PSID's cross-sectional weights are well suited for analyses that use information from only one wave, especially if a user would like to draw inferences from the full set of sample and nonsample persons within a particular year. Prior to 1997, users who wish to conduct cross-sectional analyses are advised to use the PSID's longitudinal weights, while recognizing that their analyses will be based solely on PSID sample persons.

Finally, PSID-SHELF provides two variables that account for the PSID's complex sampling design. The stratum and cluster variables are used for computing complex-sample-design-corrected standard errors and variance estimates via the Taylor Series Linearization or Repeated Replication methods (STRATUM, CLUSTER). These variables may be used with a variety of software programs that incorporate the complex sample design into variance estimation, including Stata, SAS, Sudaan, SPSS and others.

[5] Using the PSID's longitudinal weights as a baseline for calibration, the PSID's cross-sectional weights are calibrated using estimated population counts that were derived from: (a) the Current Population Survey (CPS) Annual Social and Economic (ASEC), between 1997 and 2013; and (b) the American Community Survey (ACS) one-year Public Use Microdata Sample (PUMS), from 2015 until present. The creation of the cross-year weights are described in detail in a PSID Technical Report authored by Wen Chang and colleagues (2023).

3 Social Characteristics

3.1 Demographics

There are four sets of basic demographic characteristics that PSID-SHELF provides for every member of the family unit.

First, there is one summary measure that identifies an individual's sex (`DEMO_SEX`). The variable has two potential values (male; female), which do not vary over time.

Second, there are two summary measures that identify an individual's birth year (`DEMO_BIRTH_YEAR`) and their birth month (`DEMO_BIRTH_MONTH`). Since 1983, the PSID has provided a time-varying measure of an individual's birth year and birth month. Because the PSID recommends using the latest reports, based on the most up-to-date information available, PSID-SHELF provides two summary measures that identify an individual's birth year and month, based on the most recent report.

Third, there are two summary measures that identify whether an individual has died. PSID-SHELF generated a binary indicator, for every individual, indicating whether they have had a reported death (`DEMO_DEATH_REP`). The variable has two potential values (a death has never been reported; a death has been reported). This measure captures any death that was reported by a respondent (during the survey interview) or reported to PSID staff (as part of the data collection effort). Despite the best efforts of PSID staff, there will be some individuals whose deaths were not reported after they move out or exit they survey.

PSID-SHELF also includes a variable that identifies the year in which an individual died (`DEMO_DEATH_YEAR`). In most cases, the PSID provides an exact year of death, reported by the respondent (which can sometimes be reported several years after an individual's death). In some cases, the respondent was not certain about the exact year of death and, instead, they will provide a range of years in which an individual's death occurred. In these latter cases, PSID-SHELF provides an estimated year of death, based on the midpoint of the range that was provided by the respondent.

Fourth, there is a time-varying measure of an individual's age in each survey year. The first variable is a generated measure of age, which is calculated by subtracting an individual's birth year from the current survey year (`DEMO_AGE_GEN`). The variable has a range of values between 0 and 107. The main advantage of the generated measure of

The complete list of Social Characteristic Variables can be found on p. 53.

age is that the variable is consistent, across survey waves, and it is less affected by recall bias.

does not suffer from recall bias. However, the measure calculates age based solely on a person's birth year and the current survey year. That is, the generated measure of age does not factor in an individual's birth month, at the exact date of the survey interview.

PSID-SHELF also provides a reported measure of age, based on the age that was reported by the respondent for each individual in the family unit, at the time of interview (`DEMO_AGE_REP`). The variable has a range of values between 1 and 108. Although the reported measure of age might be more precise (i.e., if the respondent factors in an individual's exact birthday and the current date of the survey interview), the reported measure of age may also suffer from measurement error, if the respondent misremembers the individual's exact birthday—or miscalculates the individual's age based on an incorrect birth year. Additionally, because of the standard practice for survey data in 1968, newborn children were assigned values of 1 (rather than 0), because zero values were used to denote individuals who were not current members of a PSID sample family during a particular survey year. Therefore, in many cases, when children are below the age of 2, they can have multiple reported ages of 1 in back-to-back survey waves.

3.2 Education

There are two primary sets of measures that capture an individual's educational attainment: (1) years of education and (2) highest level of education. Whereas the years of education measure is collected for each member of the family unit, the level of education measure is generated from variables that are only collected for the reference couple (i.e., reference person and spouse). Both measures comprise time-varying variables that capture educational attainment in a given year (e.g., `EDU_YEAR` and `EDU_LEVEL`), as well as a single summary measure that identifies an individual's highest-ever reported value, across all available waves (e.g., `EDU_YEAR_MAX` and `EDU_LEVEL_MAX`).

Total years of schooling

The years of education measure provides the number of years of schooling that an individual has completed at the time of survey. The measure was assigned to the individual level (`EDU_YEAR`, `EDU_YEAR_MAX`). PSID-SHELF also provides educational information for each family unit's reference person (`EDU_YEAR_RP`, `EDU_YEAR_MAX_RP`) and spouse/partner (`EDU_YEAR_SP`, `EDU_YEAR_MAX_SP`). These measures are assigned to every member of the family unit. Analytically, this can be useful for drawing inferences about parental education and socioeconomic status.

Highest level of education

The level of education measure captures the highest educational milestone that an individual has completed at the time of survey. The measure was assigned to the individual level (`EDU_LEVEL`, `EDU_LEVEL_MAX`). The variable comprises five potential values (did not complete high school; completed high school, did not attend college; attended

college, no bachelor's degree; bachelor's degree, no postgraduate degree; postgraduate degree). PSID-SHELF also provides educational information for each family unit's reference person (EDU_LEVEL_RP, EDU_LEVEL_MAX_RP) and spouse/partner (EDU_LEVEL_SP, EDU_LEVEL_MAX_SP). These measures are assigned to every member of the family unit. Analytically, this can be useful for drawing inferences about parental education and socioeconomic status.

Wave-specific reports

Between 1968 and 1990, the highest grade completed provided a time-varying measure of the number of years of gradeschool that were completed and, where relevant, the degree status and level of training for individuals who completed high school (EDU_GRDE). Beginning in 1985 (until present), a comprehensive set of educational milestones were introduced; these time-varying measures capture whether the individual graduated from high school or earned their GED/high school equivalency exam (EDU_HSCH), whether the individual attended college (EDU_COLL_ATT), the highest college degree attained by the individual (EDU_COLL_DEG), whether an individual has graduated with a bachelor's degree (EDU_COLL_GRA), and the number of years that an individual has completed in college (EDU_COLL_NUM).

Two additional measures capture the education of individuals who attended institutions outside of the United States. Since 1985, two time-varying measures were included to identify whether an individual was educated at an institution outside the United States (EDU_ICOL_ATT) and the highest degree attained from an institution outside of the United States (EDU_ICOL_DEG). All of the variables for the wave-specific reports were assigned to the individual level (whenever the individual was a member of the reference couple).

Consistency of wave-specific reports

The level of education measure is based on different combinations of the wave-specific reports, depending on the availability of these variables. Two approaches were used to generate the level of education measure. (1) The direct observation approach—which is the preferred method for PSID-SHELF—calculates an individual's educational stage using the comprehensive set of educational milestones that were collected since 1985 (until present). (2) When educational milestones were unavailable (e.g., between 1968 and 1984), a proxy approach was used to calculate an individual's educational stage, based on an individual's years of education completed (which the PSID has collected since 1968, until present). An individual with fewer than 12 years of education was classified as "did not complete high school." An individual with exactly 12 years of education was classified as "completed high school, did not attend college." An individual with between 13 and 15 years of education was classified as "attended college, no bachelor's degree." An individual with exactly 16 years of education was classified as "bachelor's degree, no postgraduate degree." An individual with more than 16 years of education was classified as "postgraduate degree." However, if an individual's comprehensive set of educational milestones have ever been reported (during the current survey year or in a prior wave), the direct observation approach will always supersede the proxy approach.

3.3 Family type

Family characteristics were collected for every family unit. In some cases, multiple family units reside in the same household unit (i.e., the physical dwelling); therefore, variables that refer to the family unit capture the members of independent economic entity.

There are two time-varying measures that provide a count of the number of family members. Family size is a time-varying measure of the total number of individuals who were present in a family unit (`FAM_SIZE`). The number of children is a time-varying measure of the number of children (defined as aged 17 or lower) in the family unit (`FAM_SIZE_CHI`).

PSID-SHELF provides two time-varying measures of the reference person's relationship status—with a coresident spouse or partner. The first measure identifies whether the reference person is currently living with a spouse or partner in the family unit (`FAM_PARTNERED`). This initial variable has two potential values (no, the reference person does not have a spouse/partner who lives in family unit; yes, the reference person does have a spouse/partner who lives in family unit). This binary indicator was generated from a variable that identifies the partnership status of the reference person, at the time of interview (`FAM_PARSTAT`). This second variable has six potential values (married or currently cohabiting; separated/not living with spouse, and not currently cohabiting; divorced/annulled and not currently cohabiting; widowed and not currently cohabiting; single/never married and not currently cohabiting; married but spouse absent).

There are two other time-varying measures that capture the reference person's marital status—and their legal marriage to a spouse, regardless of coresidency. The first measure identifies whether the reference person is currently married to a legal spouse (`FAM_MARRIED`). This initial variable has two potential values (no, the reference person is not legally married; yes, the reference person is legally married). This binary indicator was generated from a variable that identifies the marital status of the reference person, at the time of interview (`FAM_MARSTAT`). This second variable has five potential values (married/not separated; separated; divorced/annulled and not remarried; widowed and not remarried; never legally married).

Consistency of wave-specific reports

In 1977, there was an important change to the information that the PSID collected about the spouse and partner. Prior to 1977, the PSID collected about the reference person's partnership status, which grouped together (a) legal spouses and (b) cohabiting partners who have lived with the reference person for at least two years. Beginning in 1977 (until present), the PSID introduced a second question about the reference person's legal marriage status, which focuses exclusively on legal marriage. Note that the first question—about partnership status—has continued to be collected since 1968 (until present), thereby facilitating the full range of cross-year comparisons, robustness checks, and the classification of both legal spouses and cohabiting partners.

3.4 Geography

PSID-SHELF collects characteristics about current geography, where a family unit resides, and childhood geography, where an individual grew up. There are two measures for each location type: state and region.

State-based measures comprise up to 57 potential values: the 48 continental states of the United States of America, Alaska, Hawaii, and seven codes for locations outside of the United States. These state codes are enumerated below.

GEO_STATE

1	Alabama	27	Nevada
2	Arizona	28	New Hampshire
3	Arkansas	29	New Jersey
4	California	30	New Mexico
5	Colorado	31	New York
6	Connecticut	32	North Carolina
7	Delaware	33	North Dakota
8	District of Columbia	34	Ohio
9	Florida	35	Oklahoma
10	Georgia	36	Oregon
11	Idaho	37	Pennsylvania
12	Illinois	38	Rhode Island
13	Indiana	39	South Carolina
14	Iowa	40	South Dakota
15	Kansas	41	Tennessee
16	Kentucky	42	Texas
17	Louisiana	43	Utah
18	Maine	44	Vermont
19	Maryland	45	Virginia
20	Massachusetts	46	Washington
21	Michigan	47	West Virginia
22	Minnesota	48	Wisconsin
23	Mississippi	49	Wyoming
24	Missouri	50	Alaska
25	Montana	51	Hawaii
26	Nebraska		

800	U.S. territory or country outside the United States
801	English-speaking British Commonwealth country (incl AU, CA, NZ, UK)
802	Northern European country (incl AT, CH, CZ, DE, FR, PL, RU, SE)
803	Southern and Eastern European country (incl AL, BG, ES, GR, IT, RO, YU)
804	Central and South American country (incl MX, West Indies)
805	Asian and Middle Eastern country (incl EG; excl RU)
806	African country (excl EG)

PSID-SHELF harmonizes all state-based measures to use the original PSID State Codes (enumerated above). PSID State Codes were developed several decades before many

alternate geographic codes and standards were developed. In 1997 (until present), some variables (e.g., an individual's *childhood* state of residence) switched from PSID State Codes to FIPS State Codes; however, the primary geographic identifier of a family unit's *current* state of residence has continued to use PSID State Codes since 1968 (until present). Therefore, PSID-SHELF harmonizes state-based measures using the PSID State Codes, (a) in order to ensure that there is consistency across all variables and (b) to maximize the level of detail captured by the original coding scheme.

Regional measures comprise six potential values: the Northeast, the Midwest, the South, the West, Alaska or Hawaii, and countries outside of the United States. The regional codes are listed below, with a crosswalk that identifies which states are included in each region.

GEO_REGION		GEO_STATE	
1	Northeast	6	Connecticut
		18	Maine
		20	Massachusetts
		28	New Hampshire
		29	New Jersey
		31	New York
		37	Pennsylvania
		38	Rhode Island
		44	Vermont
2	Midwest	12	Illinois
		13	Indiana
		14	Iowa
		15	Kansas
		21	Michigan
		22	Minnesota
		24	Missouri
		26	Nebraska
		33	North Dakota
		34	Ohio
		40	South Dakota
		48	Wisconsin
3	South	1	Alabama
		3	Arkansas
		7	Delaware
		8	District of Columbia
		35	Oklahoma
		39	South Carolina
		41	Tennessee
		42	Texas
		45	Virginia

		47	West Virginia
4	West	2	Arizona
		4	California
		5	Colorado
		11	Idaho
		25	Montana
		27	Nevada
		30	New Mexico
		36	Oregon
		43	Utah
		46	Washington
		49	Wyoming
5	Alaska or Hawaii	50	Alaska
		51	Hawaii
6	Country outside the United States	800	U.S. territory or country outside the United States
		801	English-speaking British Commonwealth country (incl AU, CA, NZ, UK)
		802	Northern European country (incl AT, CH, CZ, DE, FR, PL, RU, SE)
		803	Southern and Eastern European country (incl AL, BG, ES, GR, IT, RO, YU)
		804	Central and South American country (incl MX, West Indies)
		805	Asian and Middle Eastern country (incl EG; excl RU)
		806	African country (excl EG)

3.4.1 Current geography

Three wave-specific measures of current geography were collected for every family unit in the survey. These measures represent the current state that a family unit resides in (`GEO_STATE`) and the current region of the United States that a family unit resides in (`GEO_REGION`).

Beginning in 2015 (until present), there is also a measure that identifies whether a family unit currently lives in a metropolitan area (`GEO_METRO`). The measure for a metropolitan area comprises two potential values (non-metropolitan area; metropolitan area), defined by the Beale-Ross Rural-Urban Continuum Codes (USDA 2024). Beale-Ross codes of 1 to 3 are classified as metropolitan areas, and Beale-Ross codes of 4 to 9 are classified as non-metropolitan areas.

3.4.2 Childhood geography

Two summary measures of childhood geography were collected for members of the reference couple and assigned to each individual (who was ever observed as a member of the reference couple). These measures represent the state and region of residence in which an individual grew up (`CGEO_STATE`, `CGEO_REGION`). These summary measures were generated based on the majority response across all available waves (with a very small

number of ties broken by the most recent report). Reports of childhood geography were collected for the reference person in every wave of the survey; and reports were collected for the spouse/partner in 1976, 1985, and every wave since 2009 (until present).

3.5 Race and ethnicity

PSID-SHELF provides racial and ethnic characteristics for any individual who was ever observed in the reference couple of a PSID family unit (i.e., reference person or spouse/partner). These measures are then assigned to the individual level. Although the PSID collects time-varying measures of race and ethnic origin, PSID-SHELF provides four summary measures of an individual's racial/ethnic identity, as well the time-varying measures of an individual's race and ethnic origin.

Summary measures

PSID-SHELF provides four summary measures of an individual's racial/ethnic characteristics. These summary measures differ in terms of (a) how they handle multiple reports of race (which began in 1985); and (b) whether they include the full range of racial/ethnic characteristics or whether they provide a collapsed number of categories. Each summary measure is generated from the majority response—across every observation of race and ethnic origin (with a small number of ties being broken by the most recent report).

The first summary measure of racial/ethnic identity is based solely on the "first mention" of an individual's racial/ethnic identity (`RACE_ETH_MAJ`), and the second summary measure is based on up to four reports, in the years that it was possible for a respondent to provide "multiple mentions" of race (`RACE_ETH_MM_MAJ`). Collapsed versions of these variables are also provided, with a reduced number of categories (`RACE_ETH_MAJ_COL`, `RACE_ETH_MM_MAJ_COL`). The collapsed values are listed below, with a crosswalk that identifies equivalent values between the collapsed and non-collapsed versions of the variable. Each of these summary measures has been harmonized across all waves, there was an important change to how the PSID handled Hispanic identities in 1985 (discussed in more detail in the following subsection: consistency of wave-specific reports).

Before 1985, there were up to eight combinations of racial/ethnic characteristics that an individual could be assigned:

`RACE_ETH_MAJ_COL` (1968–1984)		`RACE_ETH_MAJ` (1968–1984)	
1	Black	100	Black
3	White	200	White
2	Hispanic	300	Latino or Spanish descent
4	Other race	401	American Indian or Alaska Native
		402	Asian
		403	Native Hawaiian or Pacific Islander
		450	Asian or Pacific Islander
		480	Other race

Since 1985, when there was a change in how the PSID handled Hispanic identities, there were up to 15 combinations of racial/ethnic characteristics that an individual could be assigned:

RACE_ETH_MAJ_COL (1985–present)		RACE_ETH_MAJ (1985–present)	
1	Black, non-Hispanic	100	Black, non-Hispanic
2	White, non-Hispanic	200	White, non-Hispanic
3	Hispanic	300	Unspecified race, Hispanic
		301	Black, Hispanic
		302	White, Hispanic
		303	American Indian or Alaska Native, Hispanic
		304	Asian, Hispanic
		305	Native Hawaiian or Pacific Islander, Hispanic
		350	Asian or Pacific Islander, Hispanic
		380	Other race, Hispanic
4	Other race, non-Hispanic	401	American Indian or Alaska Native, non-Hispanic
		402	Asian, non-Hispanic
		403	Native Hawaiian or Pacific Islander, non-Hispanic
		450	Asian or Pacific Islander, non-Hispanic
		480	Other race, non-Hispanic

PSID-SHELF also provides summary measures of racial/ethnic identity for each family unit's reference person (`RACE_ETH_MAJ_RP`, `RACE_ETH_MM_MAJ_RP`, `RACE_ETH_MAJ_COL_RP`, `RACE_ETH_MM_MAJ_COL_RP`) and spouse/partner (`RACE_ETH_MAJ_SP`, `RACE_ETH_MM_MAJ_SP`, `RACE_ETH_MAJ_COL_SP`, `RACE_ETH_MM_MAJ_COL_SP`). These measures are assigned to every member of the family unit. Analytically, this can be useful for drawing inferences about children in the family unit, whose own racial/ethnic characteristics are not collected directly.

Wave-specific reports

The time-varying measures of race and ethnic origin are also available, at the individual level, in each year that an individual was a member of the family unit's reference couple (i.e., reference person or spouse/partner). Prior to 1985, the respondent was asked a single question about an individual's racial identity (e.g., `RACE_ONLY_1M`), followed by the collection of multiple reports of race (`RACE_ONLY_1M`, `RACE_ONLY_2M`, `RACE_ONLY_3M`, `RACE_ONLY_4M`). Before this change to the survey instrument in 1985, the respondent could report Hispanic ethnicity by selecting the "Spanish descent" option for the single measure of race. Since 1985, a second question was introduced that separately asked the respondent about an individual's ethnic origin/Spanish descent (`ETH_ONLY_SPAN`), enabling the joint classification of racial and ethnic identity.

Consistency of wave-specific reports

In a small number of cases, there is variation in the racial/ethnic identification of an individual across survey years. This can be due to changes to interview protocol or

because the respondent provided different responses to the questionnaire. Multiple reports of racial identity were introduced in 1985 (second mentions) and in 1994 (third and fourth mentions). In 1985, new questions about race and ethnic origin were added to the survey interview, thereby allowing for the systematic identification of racial/ethnic characteristics. Prior to 1985, for example, individuals who may have identified as White/Hispanic or Black/Hispanic individuals would have been classified exclusively as either White, Black, or of Spanish descent.

Over the years, there have been three major changes to how the PSID has collected racial/ethnic characteristics. Initially, racial characteristics were collected by interviewer identification, with no required input from the respondent (1968–1972). For the next decade, there were no new reports of race, due to the shift to telephone interviews (1973–1984). As a result, racial identities between 1973 and 1984 were carried forward from the 1972 interview, and all splitoff families (e.g., children who form their own family units) were assumed to be the "same race" as the main family's reference person (from which they split off). Finally, the PSID added two questions about race and ethnic origin to the interview questionnaire in 1985, thereby allowing the respondent to self-identify their own racial/ethnic characteristics and the racial/ethnic characteristics of their spouse/partner (1985–present). From 1994 to 1996, and again from 1999 to 2001, reports of race and ethnic origin were carried forward for each member of the reference couple, unless the reference person or spouse/partner were newly added to the PSID sample. It was not until 2003 that questions about racial/ethnic characteristics were asked biennially of every respondent.

3.6 Time use

PSID-SHELF provides nine measures that capture how an individual's time was allocated across different activities, such as paid work, caregiving, housework, and recreation. Each variable provides a count of how many hours an individual spends on a given activity during a typical week. These characteristics were collected for both the reference person and spouse/partner, and each measure was assigned to the individual level (whenever an individual was a member of the reference couple).

Three measures identify the number of hours that an individual spent on paid work (`TIME_WORK`), educational activities (`TIME_EDUC`), and volunteering (`TIME_VOLU`), during a typical week. One measure identifies the number of hours that an individual spent on housework (`TIME_HOUS`), during a typical week. Two measures identify the number of hours that an individual spent caring for adults (`TIME_ACAR`) and for children (`TIME_CCAR`), during a typical week. Finally, three measures identify the number of hours spent on leisure activities (`TIME_LEIS`), personal care (`TIME_PERS`), and shopping (`TIME_SHOP`), during a typical week.

Most of the time-use measures were first introduced in 2017 and have been collected for each subsequent survey wave. The time-use measure that identifies the number of hours spent on housework, however, was introduced to the survey instrument in 1976 and has been asked in each subsequent survey wave (with the exception of 1982).

4 Health Characteristics

4.1 Chronic conditions

PSID-SHELF provides 13 sets of harmonized measures for chronic health conditions. Information about chronic health conditions was collected for both the reference person and spouse/partner, and each measure was assigned to the individual level (whenever an individual was a member of the reference couple). There are questions for 12 specific conditions are asked in every wave, along with a final set of questions about any other conditions that were not included in the list of specific conditions:

The following chronic health conditions:

For each condition, the respondent was asked whether an individual has ever received a diagnosis, the age at which the individual first received a diagnosis, the degree of limitation that the condition currently has on the individual's daily activities, and whether the individual was currently taking medication or receiving treatment for the condition. In some cases, additional questions were asked for specific chronic conditions, such as the specific type of diagnosis (e.g., type of cancer) or whether the condition has occurred more than once (e.g., a second heart attack).

In 1999, the PSID first introduced its series of questions about chronic conditions, and the interview protocol was updated to include additional questions in 2005 (e.g., about

The complete list of Health Characteristic Variables can be found on p. 55.

the age of first diagnosis) and 2011 (e.g., about an individual's current medications or treatment for the condition).

4.1.1 Arthritis or rheumatism

The first chronic condition captures an individual's history of arthritis or rheumatism. For each member of the reference couple, the respondent was asked to report whether the individual has ever had a diagnosis (CCON_ARTH_DIAG_ANY), the age at which the individual first received a diagnosis (CCON_ARTH_DIAG_AGE), the degree of limitation that the condition currently has on the individual's daily activities (CCON_ARTH_DEGR), and whether the individual was currently "taking medication or receiving treatment" for the condition (CCON_ARTH_CARE).

4.1.2 Asthma

The second chronic condition captures an individual's history of asthma. For each member of the reference couple, the respondent was asked to report whether the individual has ever had a diagnosis (CCON_ASTH_DIAG_ANY), the age at which the individual first received a diagnosis (CCON_ASTH_DIAG_AGE), the degree of limitation that the condition currently has on the individual's daily activities (CCON_ASTH_DEGR), and whether the individual was currently "taking or carrying medication or an inhaler" for the condition (CCON_ASTH_CARE).

4.1.3 Cancer or a malignant tumor

The third chronic condition captures an individual's history of cancer or a malignant tumor. For each member of the reference couple, the respondent was asked to report whether the individual has ever had a diagnosis (CCON_CANC_DIAG_ANY), the age at which the individual first received a diagnosis (CCON_CANC_DIAG_AGE), the degree of limitation that the condition currently has on the individual's daily activities (CCON_CANC_DEGR), and the individual's current treatment status (CCON_CANC_STAT), with three potential values (in treatment; in remission; cured). Additionally, the respondent was asked to report up to two types of cancer that the individual had been diagnosed with (CCON_CANC_TYPE_1M, CCON_CANC_TYPE_2M).

4.1.4 Diabetes or high blood sugar

The fourth chronic condition captures an individual's history of diabetes. For each member of the reference couple, the respondent was asked to report whether the individual has ever had a diagnosis (CCON_DIAB_DIAG_ANY), the age at which the individual first received a diagnosis (CCON_DIAB_DIAG_AGE), the degree of limitation that the condition currently has on the individual's daily activities (CCON_DIAB_DEGR), and whether the individual was currently "taking medication that [they] swallow, using insulin shots, or a pump" for the condition (CCON_DIAB_CARE).

4.1.5 Emotional, nervous, or psychiatric problems

The sixth chronic condition captures whether an individual has a history of an emotional, nervous, or psychiatric problem. For each member of the reference couple, the respondent was asked to report whether the individual has ever had a diagnosis (CCON_EMOP_DIAG_ANY), the age at which the individual first received a diagnosis (CCON_EMOP_DIAG_AGE), the degree of limitation that the condition currently has on the individual's daily activities (CCON_EMOP_DEGR), and whether the individual was currently "taking tranquilizers, antidepressants, or pills for nerves" (CCON_EMOP_CARE). Additionally, the respondent was asked to report up to three types of emotional, nervous, or psychiatric problems that the individual had been diagnosed with (CCON_EMOP_TYPE_1M, CCON_EMOP_TYPE_2M, CCON_EMOP_TYPE_3M).

4.1.6 Heart attack

The fifth chronic condition captures an individual's history of heart attacks. For each member of the reference couple, the respondent was asked to report whether the individual has ever had a diagnosis (CCON_HATT_DIAG_ANY), the age at which the individual first received a diagnosis (CCON_HATT_DIAG_AGE), the degree of limitation that the condition currently has on the individual's daily activities (CCON_HATT_DEGR), and whether the individual was "currently taking or carrying medication" for the condition (CCON_HATT_CARE). Additionally, the respondent was asked to report whether the individual had a second heart attack (CCON_HATT_DIAG_2ND).

4.1.7 Heart disease, angina, or congestive heart failure

The seventh chronic condition captures an individual's history of heart disease, angina, or congestive heart failure. For each member of the reference couple, the respondent was asked to report whether the individual has ever had a diagnosis (CCON_HDIS_DIAG_ANY), the age at which the individual first received a diagnosis (CCON_HDIS_DIAG_AGE), the degree of limitation that the condition currently has on the individual's daily activities (CCON_HDIS_DEGR), and whether the individual was currently "taking or carrying medication" for the condition (CCON_HDIS_CARE).

4.1.8 High blood pressure or hypertension

The eighth chronic condition captures an individual's history of high blood pressure or hypertension. For each member of the reference couple, the respondent was asked to report whether the individual has ever had a diagnosis (CCON_HIBP_DIAG_ANY), the age at which the individual first received a diagnosis (CCON_HIBP_DIAG_AGE), and the degree of limitation that the condition currently has on the individual's daily activities (CCON_HIBP_DEGR), and whether the individual was currently "taking medication" for the condition (CCON_HIBP_CARE).

4.1.9 Learning disorder

The ninth chronic condition captures whether an individual has been diagnosed with a learning disorder. For each member of the reference couple, the respondent was asked to report whether the individual has ever had a diagnosis (CCON_LDIS_DIAG_ANY), the age at which the individual first received a diagnosis (CCON_LDIS_DIAG_AGE), the degree of limitation that the condition currently has on the individual's daily activities (CCON_LDIS_DEGR), and whether the individual was currently "taking medication or receiving treatment" for the condition (CCON_LDIS_CARE).

4.1.10 Loss of memory or mental ability

The tenth chronic condition captures whether an individual has experienced loss of memory or mental ability. For each member of the reference couple, the respondent was asked to report whether the individual has ever had a diagnosis (CCON_LMEM_DIAG_ANY), the age at which the individual first received a diagnosis (CCON_LMEM_DIAG_AGE), the degree of limitation that the condition currently has on the individual's daily activities (CCON_LMEM_DEGR), and whether the individual was currently "taking medication" for the condition (CCON_LMEM_CARE).

4.1.11 Lung disease

The eleventh chronic condition captures an individual's history of lung disease. For each member of the reference couple, the respondent was asked to report whether the individual has ever had a diagnosis (CCON_LUNG_DIAG_ANY), the age at which the individual first received a diagnosis (CCON_LUNG_DIAG_AGE), the degree of limitation that the condition currently has on the individual's daily activities (CCON_LUNG_DEGR), and whether the individual was currently "taking medication or receiving treatment" for the condition (CCON_LUNG_CARE).

4.1.12 Stroke

The twelfth chronic condition captures an individual's history of strokes. For each member of the reference couple, the respondent was asked to report whether the individual has ever had a diagnosis (CCON_STRO_DIAG_ANY), the age at which the individual first received a diagnosis (CCON_STRO_DIAG_AGE), the degree of limitation that the condition currently has on the individual's daily activities (CCON_STRO_DEGR), and whether the individual was currently "taking medication" for the condition or its complications (CCON_STRO_CARE). Additionally, the respondent was asked to report whether the individual had a second stroke (CCON_STRO_DIAG_2ND).

4.1.13 Other conditions

The thirteenth chronic condition captures an individual's history of any other conditions that were not covered by the previous 12 items in the chronic-condition questionnaire. For each member of the reference couple, the respondent was asked to report whether the individual has ever had a diagnosis (CCON_OCON_DIAG_ANY), the age at which the individual

first received a diagnosis (CCON_OCON_DIAG_AGE), the degree of limitation that the condition currently has on the individual's daily activities (CCON_OCON_DEGR), and whether the individual was currently "taking medication" for the condition (CCON_OCON_CARE). Additionally, the respondent was asked to report the type of condition that the individual had been diagnosed with (CCON_OCON_TYPE).

4.2 COVID-19

PSID-SHELF provides a comprehensive set of 15 summary measures about each family's experiences with the Coronavirus Disease 2019 (Covid-19). In 2021, the respondent was asked a series of questions about different aspects of Covid-19, such as whether an individual has ever been vaccinated, received a test, experienced symptoms, been admitted to the hospital, or experienced any lingering effects of Covid-19.

For most questions in the PSID's Covid-19 survey instrument, the respondent was asked to report on the experiences of the reference person and spouse/partner, and each measure was assigned to the individual level (whenever an individual was a member of the reference couple). However, for two questions—about vaccination status and positive indication of having Covid-19—the respondent was asked about every person who lived in the family unit, and each measure was assigned to the individual level (regardless of whether an individual was a member of the reference couple or another family unit member).

Vaccination status

The respondent was asked to report whether an individual has ever received a Covid-19 vaccine (COVID_VACC). This variable has two potential values (has not received vaccine; has received vaccine). If someone received only one dose of a vaccine that involves a two-dose sequence, the respondent was instructed to report that the individual had received a vaccine. Note that vaccination status is one of two Covid-19 measures that was collected for each member of the family unit in 2021 (unless the respondent answered "don't know" or "refuse" to the question), and this measure was assigned to the individual level (regardless of whether an individual was a member of the reference couple or another family unit member).

Positive indication of having Covid-19

The respondent was asked to report whether an individual has ever had Covid-19, which includes both confirmed diagnoses and presumed positives (COVID_POSI). This variable has two potential values (no positive; positive). Note that the positive indication of having Covid-19 is one of two Covid-19 measures that was collected for each member of the family unit in 2021 (unless the respondent answered "don't know" or "refuse" to the question), and this measure was assigned to the individual level (regardless of whether an individual was a member of the reference couple or another family unit member).

The consultation of a medical professional

The respondent was asked to report whether an individual has ever spoken with a medical professional about having Covid-19 (COVID_MEDI). The variable has seven potential values. Values of zero identify individuals who have never talked to a medical professional about having Covid-19. The remaining six values apply to individuals who have talked to a medical professional about having Covid-19, classifying them by the professional's medical opinion about whether they had Covid-19 (definitely not Covid-19; probably not Covid-19; might be Covid-19; probably Covid-19; definitely Covid-19; opinion not reported). This measure was assigned to the individual level (whenever an individual was a member of the reference couple).

Testing, diagnoses, and symptoms of Covid-19

PSID-SHELF includes three measures of testing, diagnoses, and symptoms of Covid-19. The first variable identifies whether an individual has ever taken a Covid-19 test (COVID_TEST), which features two potential values (has not received test; has received test). The second variable identifies whether an individual has ever received a confirmed diagnosis for Covid-19, by a medical professional or a Covid-19 test (COVID_DIAG), which features two potential values (no confirmed diagnosis; confirmed diagnosis). The third variable identifies whether an individual has ever reported having symptoms of Covid-19 (COVID_SYMP), which features two potential values (has not had symptoms of Covid-19; has had symptoms of Covid-19). All of the measures regarding testing, diagnoses, and symptoms were assigned to the individual level (whenever an individual was a member of the reference couple).

Hospital admission and treatments for Covid-19

PSID-SHELF includes six measures of hospital admission and treatments for Covid-19. The respondent was two initial questions about whether an individual has ever been admitted to the hospital for Covid-19 (COVID_HOSP_ANY) and the number of nights that an individual spent in the hospital for Covid-19 (COVID_HOSP_NUM). The first variable, about admission, has two potential values (not hospitalized for Covid-19; hospitalized for Covid-19). The second variable provides a count of the number of nights spent in the hospital, which is coded as zero, for anyone who was never admitted to the hospital, and ranges from 1 to 60, for individuals who were admitted to the hospital.

The respondent was asked four additional questions about the types of treatment that an individual received, while they were hospitalized for Covid-19. The four binary measures identify whether an individual was: treated in the ICU (COVID_HOSP_TREAT_ICU), treated with oxygen (COVID_HOSP_TREAT_ICU), treated with a ventilator (COVID_HOSP_TREAT_ICU), or received another treatment for Covid-19—in addition to the ICU, oxygen, ventilator (COVID_HOSP_TREAT_OTH). Each of the binary measures have two potential values (not treated; treated). All of the measures regarding hospital admission and treatments were assigned to the individual level (whenever an individual was a member of the reference couple).

The lingering effects of Covid-19

PSID-SHELF includes three measures of the lingering effects of Covid-19—sometimes referred to as "long Covid." The respondent was asked an initial question about whether an individual has ever reported having lingering effects of Covid-19 (`COVID_LING_ANY`), which features two potential values (has not had lingering effects of Covid-19; has had lingering effects of Covid-19). Next, the respondent was asked to describe the type of lingering effects that an individual has experienced (`COVID_LING_TYPE`), which is coded as zero, for anyone who has not experienced any lingering effects, and has three potential values that are assigned to individuals based on the type of lingering effects that they have experienced (physical; mental; both physical and mental). Finally, the respondent was asked to describe the severity of the lingering effects that an individual has experienced (`COVID_LING_SEV`), which is coded as zero, for anyone who has not experienced any lingering effects, and has four potential values that are assigned to individuals based on the severity of lingering effects that they have experienced (mild; moderate; severe; very severe). All of the measures regarding the lingering effects of Covid-19 were assigned to the individual level (whenever an individual was a member of the reference couple).

Construction of summary measures

PSID-SHELF includes 15 summary measures, based on the PSID's original Covid-19 variables. Due to the nature of how the PSID's Covid-19 survey instrument was constructed, considerable attention must be paid to the "universe" of individuals who were asked specific questions—and the "skip" logic that was used in the Covid-19 questionnaire. As a result, most questions in the Covid-19 questionnaire were only asked to a subset of individuals. Analytically, this is extremely important for drawing population-level inferences about Covid-19.

For example, there are two questions in the PSID's Covid-19 questionnaire that explicitly ask about whether an individual has ever experienced symptoms of Covid-19. In the first instance, the respondent was *only* asked the question about Covid-19 symptoms for individuals who: (a) have talked with a medical professional about having Covid-19; and (b) did *not* receive a medical opinion stating that the individual "definitely" or "probably" has Covid-19. In other words, a user who analyzes this first variable—without any additional recoding—will completely ignore the potential symptoms of: (a) any individual who has never spoken with a medical professional about having Covid-19; and (b) any individual who received a diagnosis from a medical professional (i.e., told that they "definitely" or "probably" have Covid-19). In the second instance of a question about Covid-19 symptoms, the respondent was *only* asked this question about individuals who: (c) have never been admitted to a hospital for Covid-19. Therefore, a user who analyzes this second variable—without any additional recoding—will completely ignore the potentially severe symptoms of: (c) any individual who has been hospitalized for Covid-19. As a result, both of the questions that are related to symptoms in the PSID's Covid-19 questionnaire apply to a subset of individuals. Many individuals who also had symptoms (e.g., individuals who were hospitalized for Covid-19) will be coded as missing in both measures of Covid-19 symptoms. Therefore, great care must be taken when analyzing and recoding the PSID's Covid-19 variables.

By constructing a unique set of COVID-19 summary measures, PSID-SHELF ensures that each measure incorporates the full "universe" of individuals who were eligible for the COVID-19 questionnaire. That is, there is increased consistency across COVID-19 summary measures—in terms of the number of observations for each variable. For questions about vaccination status and COVID-19 positives, the PSID-SHELF measures apply to every member of the family unit. For the remaining COVID-19 questions, the PSID-SHELF measures apply to every reference person and spouse/partner. There is a small amount of variation in the number of observations, across COVID-19 measures that PSID-SHELF provides, depending on how frequently a respondent answers "don't know" or "refuse" for each question.

4.3 Dementia

PSID-SHELF includes a dementia screener for assessing a person's memory or cognitive ability. The series of questions come from the AD8® Dementia Screening Interview (Galvin et al. 2005).

The respondent was asked these questions about any individual in the family unit who was over the age of 65, and each measure was assigned to the individual level (whenever an individual was eligible for the dementia screener). These characteristics have been collected every year since 2017 (until present).

Specifically, the respondent was asked to report whether a person, over the last several years, has experienced changes in different types of behaviors or activities that are related to declines in cognitive ability (e.g., `DMNT_Q1_ANY`), with two potential values (no, no chance; yes, a change).

Q1	Change in problems with judgement or making decisions	(`DMNT_Q1_ANY`)
Q2	Change in the amount of interest in hobbies or activities	(`DMNT_Q2_ANY`)
Q3	Change in repeating stories, questions, or statements	(`DMNT_Q3_ANY`)
Q4	Change in trouble with learning how to use a tool, appliance, or gadget	(`DMNT_Q4_ANY`)
Q5	Change in forgetting the correct month or year	(`DMNT_Q5_ANY`)
Q6	Change in trouble with handling money or paying the bills	(`DMNT_Q6_ANY`)
Q7	Change in trouble with remembering appointments	(`DMNT_Q6_ANY`)
Q8	Change in daily problems with thinking or memory	(`DMNT_Q6_ANY`)

PSID-SHELF includes three wave-specific summary measures of the dementia screener: a total count that sums the eight different changes in a person's cognitive ability (`DMNT_SCORE_TOT`), whether an individual was reported to have experienced two or more changes in cognitive ability over the last several years (`DMNT_SCORE_CUT`), whether an individual was at least 65 years old and therefore eligible for the dementia screener (`DMNT_ELIG`).

Please note that questions for the PSID's dementia screener come from the Eight-item Informant Interview to Differentiate Aging and Dementia (AD8®). All rights reserved. Copyright 2008 by Washington University in St. Louis, Missouri.

4.4 Depression

PSID-SHELF includes a depression screener for assessing a person's feelings of depression, such as feeling hopeless or feeling like everything was an effort. The series of questions come from the K-6 Non-specific Psychological Distress Scale (Kessler et al. 2003).

The reference person or spouse/partner was asked these questions about *their own* feelings, and each measure was assigned to the individual level (whenever the reference person or spouse/partner was *also* the respondent, who was completing the family unit's survey interview). These characteristics were first collected in 2001, and the survey instrument has been collected in almost every wave since (2001 until present, with the exception of 2005).

Specifically, the respondent was asked to self-report the frequency of different types of depressive feelings that they have had over the past 30 days (e.g., `DEP_Q1_FREQ`), with five potential values (none of the time; a little of the time; some of the time; most of the time; all of the time).

Q1	Feel so sad nothing could cheer you up	(`DEP_Q1_FREQ`)
Q2	Feel nervous	(`DEP_Q2_FREQ`)
Q3	Feel restless or fidgety	(`DEP_Q3_FREQ`)
Q4	Feel hopeless	(`DEP_Q4_FREQ`)
Q5	Feel that everything was an effort	(`DEP_Q5_FREQ`)
Q6	Feel worthless	(`DEP_Q6_FREQ`)

PSID-SHELF includes three wave-specific summary measures of the depression screener. First, the data includes a total score from the screener, which sums the six different frequencies of depressive feelings (`DEP_SCORE_TOT`), where reports of "none of the time" were assigned a 0 and reports of "all of the time" were assigned a 4. Therefore, the total score ranges from 0 to 24, with higher numbers indicating more frequent depressive feelings. Second, the data includes a binary measure of whether a given individual receives a total score of 13 or higher (`DEP_SCORE_CUT`), where 13 is a diagnostic threshold that is commonly used and clinically validated for depression (Kessler et al. 2003). Third, PSID-SHELF includes a variable that captures how much these feelings have interfered with the individual's life or activities (`DEP_DEGR`). The variable had four potential values (not at all; a little; some; a lot).

Note that this is one of two sections of the PSID survey interview that is limited to respondents. Questions about depression were asked exclusively to individuals who meet two criteria: (1) the individual was the family unit's current reference person or spouse/partner; and (2) the individual was the family unit's current respondent, who was completing the survey interview. Consequently, the measures of depression were not collected for any individual who was another family unit member (even if said individual was currently serving as the respondent); nor were the measures collected for the reference person or spouse/partner *if* they were not also classified as the family unit's respondent during the particular survey year.

4.5 Disability

PSID-SHELF includes two sets of survey questions to measure disability: Activities of Daily Living (ADLs) and Instrumental Activities of Daily Living (IADLs). These two sets of questions help assess the functional status and independence of individuals, by evaluating their ability to perform basic and complex daily tasks.

ADLs focus on fundamental self-care tasks, such as bathing, dressing, and eating, which are essential for personal independence. Whereas, IADLs assess more complex activities necessary for living independently in the community, such as managing finances, handling transportation, and preparing meals.

Beginning in 1992 (until 1996), the two sets of survey questions for ADLs and IADLs were added to the PSID, and the respondent was asked questions about a person's functional limitations and the degree of impairment. Initially, the respondent was asked these questions about every member of the family unit (regardless of whether an individual was a member of the reference couple), and each measure was assigned to the individual level.

Since 2003 (until present), the two modules were reintroduced to the PSID survey interview, after a seven-year hiatus, though the respondent was only asked questions about the reference person and spouse/partner, and each measure was assigned to the individual level (whenever an individual was a member of the reference couple).

4.5.1 Activities of Daily Living (ADL)

The ADLs are a set of basic self-care tasks that are crucial for an individual's day-to-day functioning. There are seven activities that are included in the questionnaire. The respondent was asked to report on whether an individual has difficulty with a given activity (e.g., `ADL_Q1_ANY`) and whether they receive help to perform the activity (e.g., `ADL_Q1_HLP`), with two potential values (no, does not receive help; yes, does receive help).

Q1	Difficulty bathing or showering self	(`ADL_Q1_ANY`, `ADL_Q1_HLP`)
Q2	Difficulty dressing self	(`ADL_Q2_ANY`, `ADL_Q2_HLP`)
Q3	Difficulty feeding self	(`ADL_Q3_ANY`, `ADL_Q3_HLP`)
Q4	Difficulty moving from bed/chair	(`ADL_Q4_ANY`, `ADL_Q4_HLP`)
Q5	Difficulty walking without assistance	(`ADL_Q5_ANY`, `ADL_Q5_HLP`)
Q6	Difficulty getting outside	(`ADL_Q6_ANY`, `ADL_Q6_HLP`)
Q7	Difficulty using or getting to the toilet	(`ADL_Q7_ANY`, `ADL_Q7_HLP`)

PSID-SHELF includes two summary measures of the ADLs: a count of the number of activities that an individual was reported to have difficulty with (`ADL_SUM_TOT`) and whether there are any activities that an individual was reported to have difficulty with (`ADL_SUM_ANY`).

4.5.2 Instrumental Activities of Daily Living (IADL)

The IADLs are a set of more complex activities that are necessary for living independently in the community. There are six activities that are included in the questionnaire. The respondent was asked to report on whether an individual has difficulty with a given activity (e.g., `IADL_Q1_ANY`) and whether the difficulty was due to a health-related reason (e.g., `IADL_Q1_HEA`), with three potential values (no, difficulty is not due to health reason; yes, difficulty is due to health reason; N/A, no difficulty with activity).

Q1	Difficulty preparing own meals	(`IADL_Q1_ANY`, `IADL_Q1_HEA`)
Q2	Difficulty shopping for toilet items, personal medications	(`IADL_Q2_ANY`, `IADL_Q2_HEA`)
Q3	Difficulty managing bills or money	(`IADL_Q3_ANY`, `IADL_Q3_HEA`)
Q4	Difficulty using phone	(`IADL_Q4_ANY`, `IADL_Q4_HEA`)
Q5	Difficulty doing heavy housework	(`IADL_Q5_ANY`, `IADL_Q5_HEA`)
Q6	Difficulty doing light housework	(`IADL_Q6_ANY`, `IADL_Q6_HEA`)

PSID-SHELF includes two summary measures of the IADLs: a count of the number of activities that an individual was reported to have difficulty with (`IADL_SUM_TOT`) and whether there are any activities that an individual was reported to have difficulty with (`IADL_SUM_ANY`).

4.6 General wellbeing

PSID-SHELF provides a series of measures that researchers have identifies as important indicators of a person's general wellbeing. These topics include: (1) neonatal health, (2) general health, (3) hospitalization, (4) current height/weight, and (5) general life satisfaction.

4.6.1 Neonatal health status

PSID-SHELF includes a measure of an individual's birth weight when they were born. The respondent was asked about each child's weight when they were born (`NHLTH_BIRTH_WGHT`), which is represented in ounces. When a child's birth weight is collected, it is assigned to the individual level (i.e., the value denotes an individual's own birth weight).

In 1985, the PSID began to collect information on the birth weight of children in the PSID. In the first year that the question was included in the survey interview, birth weight was collected retrospectively for any child who was a current member of a PSID family unit in 1985. Since 1985 (until present), birth weight has been collected prospectively for any child who was born into a PSID family unit (i.e., for children who were born since the previous survey wave). However, the respondent was not asked about the birth weight of children who move into a PSID family unit more than two years after they are born (e.g., a three-year-old child who was not yet living in a PSID family unit during the previous wave).

4.6.2 General health status

There are a series of measures about an individual's general health status that have been collected for different members of a family unit. Beginning in 1984 (until present), the respondent was asked to rate the general health of each member of the reference couple (`GHLTH_STAT`), featuring five potential values (poor; fair; good; very good; excellent). Two years later, in 1986, and beginning again in 1988 (until present), the respondent was also asked to rate the general health of other members of the family unit (`GHLTH_POOR`), featuring an abridged set of two potential values (poor; not poor).

Note that for the measure of poor health, the question in the survey interview was updated twice—in terms of what the respondent was asked to rate for other family unit members (i.e., any member of the family unit who is not the reference person or spouse/partner). For one year, in 1986, the respondent was asked to report general health status for other members of the family unit, using the same five-category measure as the reference couple (poor; fair; good; very good; excellent). However, between 1988 and 1993, the questionnaire switched to a two-category measure (good; not good). Finally, beginning in 1994 (until present), the questionnaire switched to a different two-category measure (poor; not poor). PSID-SHELF includes a harmonized version of this measure, to ensure consistency for other family unit members, across years, by recoding all values to use the rating of poor health with two potential values (poor; not poor).

Finally, PSID-SHELF includes measures of reported changes to an individual's health (`GHLTH_CHNG`), and each measure was assigned to the individual level (if individuals were a member of the reference couple). This variable has three potential values (worse than two years ago; about the same as two years ago; better than two years ago).

4.6.3 Hospitalization

Measures about hospitalization were collected for both the reference person and spouse/partner, and each measure was assigned to the individual level (if individuals were a member of the reference couple). The respondent was asked whether each member of the reference couple has ever been admitted to a hospital for any reason (`HOSP_ANY`), with two potential values (yes; no), as well as the number of nights that they spent in the hospital (`HOSP_NUM`), which represents a count ranging from 1 to 300. Questions about hospitalization were added to the survey interview in 1981, 1983 (until 1987), and 2003 (until present).

4.6.4 Current height and weight

Measures of height and weight were collected for both the reference person and spouse/partner, and each measure was assigned to the individual level (if individuals were a member of the reference couple). The respondent was asked the current height of each member of the reference couple (`BODY_HGHT_IN`, `BODY_HGHT_CM`), which are represented in both inches and centimeters, regardless of the unit of measurement that was used by the respondent. The respondent was asked about the current weight of each member of the reference couple (`BODY_WGHT_LB`, `BODY_WGHT_KG`), which are represented in both pounds and kilograms, regardless of the unit of measurement that was used by

the respondent. Questions about current height and weight were asked once in 1986 and reintroduced to the survey interview in 1999 (until present).

4.6.5 General life satisfaction

A measure of life satisfaction provides information about how a person rates *their own* life. These questions were only asked to the reference person or spouse/partner when they were *also* the respondent, who was completing the family unit's survey interview. When this was the case, the reference person or spouse/partner was asked to provide a self-reported rating how satisfied they are about their life as a whole (`LIFE_STAT`), with five potential values (not at all satisfied, not very satisfied, somewhat satisfied, very satisfied, completely satisfied). The question about life satisfaction introduced to the survey interview in 2009 (until present).

Note that this is one of two sections of the PSID survey interview that is limited to respondents. Questions about life satisfaction were asked exclusively to individuals who meet two criteria: (1) the individual was the family unit's current reference person; and (2) the individual was the family unit's current respondent, who was completing the survey interview. Consequently, the measure of life satisfaction was not collected for any individual who was the spouse/partner or another family unit member (even if said individual was currently serving as the respondent); nor was the measure collected for the reference person *if* they were not also classified as the survey respondent during a particular year.

5 Economic Characteristics

5.1 Earnings

There are several measures that capture an individual's labor income that they earned from wages, business, and farming. These measures were collected for both the reference person and spouse/partner; and PSID-SHELF includes a combined measure of individual earnings for the reference couple (i.e., both the reference person and spouse/partner, if one is present in the family unit). Each measure was assigned to the individual (whenever an individual was a member of the reference couple).

All currency variables are reported in nominal U.S. dollars (based on the tax year in which the survey instrument was collected) and in real U.S. dollars in 2024 using the Personal Consumption Expenditures Price Index (PCEPI) to adjust for inflation. Finally, all currency variables are adjusted for family size by dividing the dollar amount by the square root of the total number of individuals living in the family unit.

Therefore, there are four variants of individual earnings: with and without inflation adjustments; and with and without family-size adjustments. Total family income (nominal U.S. dollars) refers to the total amount of family income earned by every member of the family unit in the relevant tax year (`EARN_TOT_ND`). Total family income (real U.S. dollars 2024) refers to the total amount of family income earned by every member of the family unit in the relevant tax year, inflation adjusted to 2024 dollars (`EARN_TOT_RD`). Each of the aforementioned measures also have a version that was adjusted for family size (`EARN_TOT_NDF`, `EARN_TOT_RDF`).

PSID-SHELF also provides measures of individual earnings for each family unit's reference person (`EARN_TOT_ND_RP`, `EARN_TOT_RD_RP`, `EARN_TOT_NDF_RP`, `EARN_TOT_RDF_RP`), spouse/partner (`EARN_TOT_ND_SP`, `EARN_TOT_RD_SP`, `EARN_TOT_NDF_SP`, `EARN_TOT_RDF_SP`), and the combined earnings of both members of reference couple (`EARN_TOT_ND_RC`, `EARN_TOT_RD_RC`, `EARN_TOT_NDF_RC`, `EARN_TOT_RDF_RC`). These measures are assigned to every member of the family unit. Analytically, this can be useful for drawing inferences about an individual's personal earnings and the various sources of total family income.

The complete list of Economic Characteristic Variables can be found on p. 58.

Consistency of wave-specific reports

The current earnings measures do not include the component of individual income from farm labor after 1993 (i.e., beginning in 1994), due to changes in how farm labor was measured. First, farm-based income must be distinguished from farming assets. Second, with the exception of a single variable in 1993 that identifies a spouse/partner's farm-based earnings, it was not until 2015 that a measure was introduced to identify whether the spouse/partner was responsible for a share of the total farm labor.

5.2 Employment

PSID-SHELF provides a series of measures related to the current employment status for many individuals in the family unit.

Prior to 1994, the respondent was asked a single question about whether an individual was employed (e.g., `EMP_STAT_1M`), followed by the collection of multiple reports of employment (`EMP_STAT_1M`, `EMP_STAT_2M`, `EMP_STAT_3M`). These variables have eight potential values. A value of 1 indicates that an individual is currently employed (or "working now"). A value between 2 and 8 indicates that an individual is currently not employed, with one of seven potential categories (temporarily laid off, sick leave, parental leave; looking for work; retired; permanently disabled, temporarily disabled; keeping house, incl. unemployed/not looking for work; student; other, 'workfare', in prison or jail).

PSID-SHELF includes a second set of time-varying measures that were generated to identify whether an individual was currently working. The first variable is based solely on the "first mention" of an individual's employment status (`EMP_WORK`), and the second summary measure is based on up to three reports, in the years that it was possible for a respondent to provide "multiple mentions" of employment status (`EMP_WORK_MM`). These variables have two potential values (not currently working; currently working).

PSID-SHELF also provides measures of employment characteristics for each family unit's reference person (`EMP_STAT_1M_RP`, `EMP_STAT_2M_RP`, `EMP_STAT_3M_RP`, `EMP_WORK_RP`, `EMP_WORK_MM_RP`) and spouse/partner (`EMP_STAT_1M_SP`, `EMP_STAT_2M_SP`, `EMP_STAT_3M_SP`, `EMP_WORK_SP`, `EMP_WORK_MM_SP`). These measures are assigned to every member of the family unit. Analytically, this can be useful for drawing inferences about children in the family unit, whose parent-level employment characteristics may provide empirical insight.

Consistency of wave-specific reports

Over the years, there have been two major changes to the PSID's collection of employment characteristics. (1) In 1994, the PSID started to collect multiple reports of employment status for some individuals. Between 1968 and 1993, the PSID survey interview only included a single question about an individual's employment status. Since 1994 (until present), the respondent was able to provide up to three reports (or "mentions") of employment for each individual. (2) In the late-1970s, the PSID started to collect employment information about a much broader range of individuals who live in the family

unit. For the first several years, employment characteristics were collected exclusively about the reference person. In 1976 and beginning again in 1979 (until present), the PSID started to collect employment information about the spouse/partner. Moreover, in 1979, the PSID began to collect employment characteristics about other family unit members who were aged 16 or older. This marked a significant change, for the employment section of the PSID survey interview, by expanding the questionnaire beyond the reference couple (i.e., reference person or spouse/partner). Every employment measure in PSID-SHELF makes use of each available measure, and priority is given to the three reports for the reference couple, followed by the single report for other family unit members.

5.3 Expenditures

Beginning in 1999, the PSID expanded its collection of family spending and consumption—that is, how much money a family unit spent on goods and services, across the last year. PSID-SHELF provides two measures of total expenditures, 10 measures of how much money was spent on different categories of expenditures, and four additional measures of how much money was spent on different subcategories of health-specific costs.

All currency variables are reported in nominal U.S. dollars (based on the tax year in which the survey instrument was collected) and in real U.S. dollars in 2024 using the Personal Consumption Expenditures Price Index (PCEPI) to adjust for inflation. Finally, all currency variables are adjusted for family size by dividing the dollar amount by the square root of the total number of individuals living in the family unit.

5.3.1 Total spending

Total spending (nominal U.S. dollars) refers to the total amount of money that a family unit spent on goods and services over the last year, excluding the value of rent (`EXPN_TOT_ND`). Total spending including rent (nominal U.S. dollars) refers to the total amount of money that a family unit spent on goods and services over the last year, including the value of rent for any family that rents their home (`EXPN_TOT_IRV_ND`). Each of the aforementioned measures also have a version that was inflation adjusted to 2024 dollars (`EXPN_TOT_RD`, `EXPN_TOT_IRV_RD`), as well as a version that was adjusted for family size (`EXPN_TOT_NDF`, `EXPN_TOT_RDF`, `EXPN_TOT_IRV_NDF`, `EXPN_TOT_IRV_RDF`).

5.3.2 Categories of expenditure

PSID-SHELF provides the total amount of money that the family unit spent on 10 broad categories of expenditures over the last year. Each expenditure category (nominal U.S. dollars) represents the total amount of money that a family unit spent, during the last year, on: childcare (`EXPN_CCAR_TOT_ND`); clothing (`EXPN_CLOT_TOT_ND`); computing (`EXPN_COMP_TOT_ND`); education (`EXPN_EDUC_TOT_ND`); food (`EXPN_FOOD_TOT_ND`); health (`EXPN_HLTH_TOT_ND`); housing (`EXPN_HOUS_TOT_ND`); transportation (`EXPN_TRAN_TOT_ND`); trips (`EXPN_TRIP_TOT_ND`); and other recreation (`EXPN_OREC_TOT_ND`). Each of the aforementioned measures also have a version that was inflation adjusted to 2024 dollars (`EXPN_CCAR_TOT_RD`, `EXPN_CLOT_TOT_RD`, `EXPN_COMP_TOT_RD`, `EXPN_EDUC_TOT_RD`, `EXPN_FOOD_TOT_RD`, `EXPN_HLTH_TOT_RD`,

EXPN_HOUS_TOT_RD, EXPN_TRAN_TOT_RD, EXPN_TRIP_TOT_RD, EXPN_OREC_TOT_RD), as well as a version that was adjusted for family size (EXPN_CCAR_TOT_NDF, EXPN_CLOT_TOT_NDF, EXPN_COMP_TOT_NDF, EXPN_EDUC_TOT_NDF, EXPN_FOOD_TOT_NDF, EXPN_HLTH_TOT_NDF, EXPN_HOUS_TOT_NDF, EXPN_TRAN_TOT_NDF, EXPN_TRIP_TOT_NDF, EXPN_OREC_TOT_NDF, EXPN_CCAR_TOT_RDF, EXPN_CLOT_TOT_RDF, EXPN_COMP_TOT_RDF, EXPN_EDUC_TOT_RDF, EXPN_FOOD_TOT_RDF, EXPN_HLTH_TOT_RDF, EXPN_HOUS_TOT_RDF, EXPN_TRAN_TOT_RDF, EXPN_TRIP_TOT_RDF, EXPN_OREC_TOT_RDF).

5.3.3 Health-specific costs

In addition to the total value of health expenditures (e.g., EXPN_HLTH_TOT_ND and EXPN_HLTH_TOT_RD), PSID-SHELF also provides four subcategories of health-specific costs. Each measure of health-specific costs (nominal U.S. dollars) represents the total amount of money that a family unit spent, during the last year, on: doctors (EXPN_HLTH_DOC_ND); prescriptions (EXPN_HLTH_PRE_ND); health insurance (EXPN_HLTH_INS_ND); and hospitals (EXPN_HLTH_HOS_ND). Each of the aforementioned measures also have a version that was inflation adjusted to 2024 dollars (EXPN_HLTH_DOC_RD, EXPN_HLTH_PRE_RD, EXPN_HLTH_INS_RD, EXPN_HLTH_HOS_RD) as well as a version that was adjusted for family size (EXPN_HLTH_DOC_NDF, EXPN_HLTH_PRE_NDF, EXPN_HLTH_INS_NDF, EXPN_HLTH_HOS_NDF, EXPN_HLTH_DOC_RDF, EXPN_HLTH_PRE_RDF, EXPN_HLTH_INS_RDF, EXPN_HLTH_HOS_RDF).

Availability of previous reports

Note that the expenditure module was added to the PSID survey interview in 1999. However, a selection of the expenditure categories were collected, in some form, prior to 1999.

Currently, PSID-SHELF only includes annual spending measures from the expenditure module that was introduced in 1999 (until present). However, this does not mean that earlier measures of spending are unavailable for certain categories of expenditure (e.g., paid childcare; housing: annual and monthly rent, property tax; food: spending at home, outside the home, on delivery).

5.4 Family income

PSID-SHELF provides four measures of family income, capturing the total amount of family income that was earned by every member of the family unit (reference person, spouse/partner, children, and any other family unit members). The PSID collects income based on the tax year prior to each survey wave (e.g., 2005's income values are based on the family's taxable income from the 2004 tax year).

All currency variables are reported in nominal U.S. dollars (based on the tax year in which the survey instrument was collected) and in real U.S. dollars in 2024 using the Personal Consumption Expenditures Price Index (PCEPI) to adjust for inflation. Finally, all currency variables are adjusted for family size by dividing the dollar amount by the square root of the total number of individuals living in the family unit.

Therefore, there are four variants of the family income measure: with and without inflation adjustments; and with and without family-size adjustments. Total family income (nominal U.S. dollars) refers to the total amount of family income earned by every member of the family unit in the relevant tax year (`FINC_TOT_ND`). Total family income (real U.S. dollars 2024) refers to the total amount of family income earned by every member of the family unit in the relevant tax year, inflation adjusted to 2024 dollars (`FINC_TOT_RD`). Each of the aforementioned measures also have a version that was adjusted for family size (`FINC_TOT_NDF`, `FINC_TOT_RDF`).

5.5 Occupations

PSID-SHELF includes measures that identify the occupations of the reference person and spouse/partner in every survey year. However, there is considerable variation across waves in the occupational coding scheme that was used: between 1968 and 2001, the 1970 Census Occupational Codes (COC1970) were used; between 2003 and 2015, the 2000 Census Occupational Codes were used (COC2000); and beginning in 2017, the 2010 Census Occupational Codes were used (COC2010).

Prior to 2003, individuals could report only one occupation, based on the 1970 code (`OCC_1970C`). Between 2003 and 2015, individuals could report up to four different occupations, based on the 2000 code (`OCC_2000C_1M`, `OCC_2000C_2M`, `OCC_2000C_3M`, `OCC_2000C_4M`). Since 2017, individuals could report up to four different occupations, based on the 2000 code (`OCC_2010C_1M`, `OCC_2010C_2M`, `OCC_2010C_3M`, `OCC_2010C_4M`). All mentions are available at the individual level.

5.6 Primary home

PSID-SHELF features information on the family's primary home, related to homeownership, home value, and mortgages held. The PSID collects housing assets and debts based on the year of the current survey wave (e.g., 2011's wealth values are based on the family's assets and debts held, in 2011, at the time of interview).

In every survey year, there is a measure that identifies a family's homeownership status for their primary home (`HOME_STAT`), containing three potential values (owns home; pays rent; neither owns home nor pays rent).

PSID-SHELF includes several measures that identify the value of a home, for any family unit that owns their home. All currency variables are reported in nominal U.S. dollars (based on the tax year in which the survey instrument was collected) and in real U.S. dollars in 2024 using the Personal Consumption Expenditures Price Index (PCEPI) to adjust for inflation. Finally, all currency variables are adjusted for family size by dividing the dollar amount by the square root of the total number of individuals living in the family unit.

Therefore, there are four variants of the measure of primary-home value: with and without inflation adjustments; and with and without family-size adjustments. There is a measure that identifies the value of the primary home, in nominal U.S. dollars

(HOME_OWN_VAL_ND, HOME_OWN_VAL_NDF) and real U.S. dollars in 2024 (HOME_OWN_VAL_RD, HOME_OWN_VAL_RDF: where the ND and RD postscripts refer to nominal values and real values that are inflation adjusted to 2024 dollars, respectively; and the trailing F in NDF or RDF indicates that values have been adjusted for family size).

Over the years, the respondent has been able to report up to one mortgage (1968), two mortgages (1969–1972, 1979–1981, 1983–1993), or three mortgages (1994–present). The number of mortgages that a family unit has taken on their primary home is captured in three separate variables: the first mention of a mortgage (HOME_OWN_MOR_ANY_1M), the second mention of a mortgage (HOME_OWN_MOR_ANY_2M), and the third mention of a mortgage (HOME_OWN_MOR_ANY_3M). Each of these variables has two potential values (no, does not have a [first/second/third] mortgage; yes, has a [first/second/third] mortgage).

A similar approach was used for reporting the remaining principal that was owed on each mortgage. Initially, the respondent was able to report one value that represented the remaining amount that was currently owed on all mortgages or land contracts on the family unit's primary home (1969–1972, 1976–1981, 1983–1993). In 1994 (until present), the respondent was able to report the specific amount that was currently owed for up to two mortgages.

The remaining principal that was owed on a family unit's primary home is captured in two separate variables: the first mention of a mortgage (HOME_OWN_MOR_VAL_1M_ND) and the second mention of a mortgage (HOME_OWN_MOR_VAL_2M_ND). Each of the aforementioned measures also have a version that was inflation adjusted to 2024 dollars (HOME_OWN_MOR_VAL_1M_RD, HOME_OWN_MOR_VAL_2M_RD), as well as a version that was adjusted for family size (HOME_OWN_MOR_VAL_1M_NDF, HOME_OWN_MOR_VAL_2M_NDF, HOME_OWN_MOR_VAL_1M_RDF, HOME_OWN_MOR_VAL_2M_RDF).

5.7 Wealth

Beginning in 1984, the PSID introduced questions related to family wealth. The respondent was asked to provide information on the sum of all assets and debts held by the members of a family unit. Initially, the wealth questionnaire was collected every five years (1984, 1989, 1994), and, since 1999, the wealth questionnaire was collected every survey wave (1999–present).

PSID-SHELF provides measures of (1) total net worth, (2) total assets, (3) total debts, and (4) the individual components of wealth collected by the PSID.

5.7.1 Total net worth

There are three sets of measures that capture a family's total net worth, defined as the sum of all assets subtracted by the sum of all debts. The first set of measures considers all sources of wealth; the second set excludes the net value of the primary home, if owned by the family; and the third set excludes the net value of the primary home and all other real estate. The PSID collects wealth based on the year of the current survey wave (e.g., 2011's wealth values are based on the family's assets and debts held, in 2011, at the time of interview).

All currency variables are reported in nominal U.S. dollars (based on the year in which the survey instrument was collected) and in real U.S. dollars in 2024 using the Personal Consumption Expenditures Price Index (PCEPI) to make the inflation adjustments. Finally, all currency variables are adjusted for family size by dividing the dollar amount by the square root of the total number of individuals living in the family unit.

Therefore, there are four variants of each set of wealth measures: with and without inflation adjustments; and with and without family-size adjustments. Total net worth (nominal U.S. dollars) refers to the total sum of a family's assets less the total sum of a family's debts at the time of survey (`WLTH_TOT_NET_ND`, `WLTH_TOT_NET_XH_ND`, `WLTH_TOT_NET_XHR_ND`: where the `XH` postscript refers to net worth excluding home equity on the primary home; and the `XHR` postscript refers to net worth excluding home equity on the primary home and the value of all other real estate). Total net worth (real U.S. dollars 2024) refers to the total sum of a family's assets less the total sum of a family's debts at the time of survey, inflation adjusted to 2024 dollars (`WLTH_TOT_NET_RD`, `WLTH_TOT_NET_XH_RD`, `WLTH_TOT_NET_XHR_RD`). Each of the aforementioned measures also have a version that was adjusted for family size (`WLTH_TOT_NET_NDF`, `WLTH_TOT_NET_XH_NDF`, `WLTH_TOT_NET_XHR_NDF`, `WLTH_TOT_NET_RDF`, `WLTH_TOT_NET_XH_RDF`, `WLTH_TOT_NET_XHR_RDF`).

5.7.2 Total assets

There are three sets of measures that capture a family's total assets: the first set considers all asset types; the second set excludes the home value of the primary home, if owned by the family; and the third set excludes the home value of the primary home and all other real estate assets.

Like with net worth, there are four variants of the family's total assets: with and without inflation adjustments; and with and without family-size adjustments. (See the "total net worth" subsection, on p. 43, for an expanded discussion of these procedures.) Total assets (nominal U.S. dollars) refers to the total sum of a family's assets at the time of survey (`WLTH_TOT_ASS_ND`, `WLTH_TOT_ASS_XH_ND`, `WLTH_TOT_ASS_XHR_ND`). Total assets (real U.S. dollars 2024) refers to the total sum of a family's assets at the time of survey, inflation adjusted to 2024 dollars (`WLTH_TOT_ASS_RD`, `WLTH_TOT_ASS_XH_RD`, `WLTH_TOT_ASS_XHR_RD`). Each of the aforementioned measures also have a version that was adjusted for family size (`WLTH_TOT_ASS_NDF`, `WLTH_TOT_ASS_XH_NDF`, `WLTH_TOT_ASS_XHR_NDF`, `WLTH_TOT_ASS_RDF`, `WLTH_TOT_ASS_XH_RDF`, `WLTH_TOT_ASS_XHR_RDF`).

5.7.3 Total debts

There are three sets of measures that capture a family's total debts: the first set considers all sources of debts; the second set excludes the value of mortgages on the primary home, if owned by the family; and the third set excludes the value of mortgages on the primary home and all other real estate debts.

Like with net worth, there are four variants of the family's total debts: with and without inflation adjustments; and with and without family-size adjustments. (See the "total net worth" subsection, on p. 43, for an expanded discussion of

these procedures.) Total debts (nominal U.S. dollars) refers to the total sum of a family's debts at the time of survey (WLTH_TOT_DEB_ND, WLTH_TOT_DEB_XH_ND, WLTH_TOT_DEB_XHR_ND). Total debts (real U.S. dollars 2024) refers to the total sum of a family's debts at the time of survey, inflation adjusted to 2024 dollars (WLTH_TOT_DEB_RD, WLTH_TOT_DEB_XH_RD, WLTH_TOT_DEB_XHR_RD). Each of the aforementioned measures also have a version that was adjusted for family size (WLTH_TOT_DEB_NDF, WLTH_TOT_DEB_XH_NDF, WLTH_TOT_DEB_XHR_NDF, WLTH_TOT_DEB_RDF, WLTH_TOT_DEB_XH_RDF, WLTH_TOT_DEB_XHR_RDF).

5.7.4 Components of wealth

PSID-SHELF provides harmonized measures of eight wealth components that are available in each survey year that wealth characteristics were collected. There are two variants of each wealth component: with and without inflation adjustments. Like with net worth, there are four variants of the family's total debts: with and without inflation adjustments; and with and without family-size adjustments. (See the "total net worth" subsection, on p. 43, for an expanded discussion of these procedures.)

There is considerable variation in how the PSID collects the components of wealth, over time. For example, prior to 2013, a single variable captured the net value of a family's real estate; beginning in 2013, two variables separately captured a family's real estate assets and debts. Therefore, PSID-SHELF includes both the disaggregated versions of these variables—which are collected in some years but not in others—and the aggregated (or net) versions of the eight wealth components—which provides harmonized measures for the eight wealth components that are reasonably consistent over time.

Primary home

The first component of wealth captures the family's home equity for their primary home, in nominal U.S. dollars and real U.S. dollars in 2024 (WLTH_HOME_TOT_ND, WLTH_HOME_TOT_RD, WLTH_HOME_TOT_NDF, WLTH_HOME_TOT_RDF: where the ND and RD postscripts refer to nominal-dollar values and real-dollar values that are inflation adjusted to 2024 dollars, respectively; and the NDF and RDF postscripts indicate that these values were also adjusted for family size). In every year that the measure is available, the component can also be disaggregated into assets owned, which is represented by total home value (WLTH_HOME_ASS_ND, WLTH_HOME_ASS_RD, WLTH_HOME_ASS_NDF, WLTH_HOME_ASS_RDF), and debts held, which is represented by total mortgage value (WLTH_HOME_DEB_ND, WLTH_HOME_DEB_RD, WLTH_HOME_DEB_NDF, WLTH_HOME_DEB_RDF).

Real estate other than the primary home

The second component of wealth captures the family's real estate holdings other than the primary home, in nominal U.S. dollars and real U.S. dollars in 2024 (WLTH_REAL_TOT_ND, WLTH_REAL_TOT_RD, WLTH_REAL_TOT_NDF, WLTH_REAL_TOT_RDF). Beginning in 2013, the component can also be disaggregated into assets owned (WLTH_REAL_ASS_ND, WLTH_REAL_ASS_RD, WLTH_REAL_ASS_NDF, WLTH_REAL_ASS_RDF) and debts held (WLTH_REAL_DEB_ND, WLTH_REAL_DEB_RD, WLTH_REAL_DEB_NDF, WLTH_REAL_DEB_RDF).

Farm and business holdings

The third component of wealth captures the family's farm and business holdings, in nominal U.S. dollars and real U.S. dollars in 2024 (WLTH_FBUS_TOT_ND, WLTH_FBUS_TOT_RD, WLTH_FBUS_TOT_NDF, WLTH_FBUS_TOT_RDF). Beginning in 2013, the component can also be disaggregated into assets owned (WLTH_FBUS_ASS_ND, WLTH_FBUS_ASS_RD, WLTH_FBUS_ASS_NDF, WLTH_FBUS_ASS_RDF) and debts held (WLTH_FBUS_DEB_ND, WLTH_FBUS_DEB_RD, WLTH_FBUS_DEB_NDF, WLTH_FBUS_DEB_RDF).

Savings

The fourth component of wealth captures the family's savings, in nominal U.S. dollars and real U.S. dollars in 2024 (WLTH_SAVI_TOT_ND, WLTH_SAVI_TOT_RD, WLTH_SAVI_TOT_NDF, WLTH_SAVI_TOT_RDF). Beginning in 2019, the component can also be disaggregated into cash and checking (WLTH_SAVI_CSH_ND, WLTH_SAVI_CSH_RD, WLTH_SAVI_CSH_NDF, WLTH_SAVI_CSH_RDF) and bonds and CDs (WLTH_SAVI_BND_ND, WLTH_SAVI_BND_RD, WLTH_SAVI_BND_NDF, WLTH_SAVI_BND_RDF).

Investment funds

The fifth component of wealth captures the family's investment funds, in nominal U.S. dollars and real U.S. dollars in 2024 (WLTH_INVE_TOT_ND, WLTH_INVE_TOT_RD, WLTH_INVE_TOT_NDF, WLTH_INVE_TOT_RDF). Beginning in 1999, the component can also be disaggregated into stocks (WLTH_INVE_STK_ND, WLTH_INVE_STK_RD, WLTH_INVE_STK_NDF, WLTH_INVE_STK_RDF) and IRAs and annuities (WLTH_INVE_IRA_ND, WLTH_INVE_IRA_RD, WLTH_INVE_IRA_NDF, WLTH_INVE_IRA_RDF).

Vehicle holdings

The sixth component of wealth captures the family's vehicle holdings, in nominal U.S. dollars and real U.S. dollars in 2024 (WLTH_VEHI_TOT_ND, WLTH_VEHI_TOT_RD, WLTH_VEHI_TOT_NDF, WLTH_VEHI_TOT_RDF). The component was never disaggregated into vehicle assets or debts; in every year that the measure is available, the variable represents the net value of all vehicles owned.

Other assets

The seventh component of wealth captures the family's other assets, in nominal U.S. dollars and real U.S. dollars in 2024 (WLTH_OASS_TOT_ND, WLTH_OASS_TOT_RD, WLTH_OASS_TOT_NDF, WLTH_OASS_TOT_RDF). The component was never disaggregated into any more granular components; in every year that the measure is available, the variable represents all other assets that are not captured by other questions in the wealth survey instrument.

Other debts

The eighth component of wealth captures the family's other debts, in nominal U.S. dollars and real U.S. dollars in 2024 (WLTH_ODEB_TOT_ND, WLTH_ODEB_TOT_RD, WLTH_ODEB_TOT_NDF, WLTH_ODEB_TOT_RDF).

Beginning in 2011, the component can also be disaggregated into credit cards (WLTH_ODEB_CRE_ND, WLTH_ODEB_CRE_RD, WLTH_ODEB_CRE_NDF, WLTH_ODEB_CRE_RDF), student loans (WLTH_ODEB_STU_ND, WLTH_ODEB_STU_RD, WLTH_ODEB_STU_NDF, WLTH_ODEB_STU_RDF), medical bills (WLTH_ODEB_MED_ND, WLTH_ODEB_MED_RD, WLTH_ODEB_MED_NDF, WLTH_ODEB_MED_RDF), legal bills (WLTH_ODEB_LEG_ND, WLTH_ODEB_LEG_RD, WLTH_ODEB_LEG_NDF, WLTH_ODEB_LEG_RDF), family loans (WLTH_ODEB_FAM_ND, WLTH_ODEB_FAM_RD, WLTH_ODEB_FAM_NDF, WLTH_ODEB_FAM_RDF), and the remaining value of all other debts that are not captured by other questions in the wealth survey instrument (WLTH_ODEB_REM_ND, WLTH_ODEB_REM_RD, WLTH_ODEB_REM_NDF, WLTH_ODEB_REM_RDF). Please note that, in 2011, when family's other debts were initially separated into multiple variables, there was not a sixth disaggregated component for remaining value of all other debts. Therefore, in 2011, there are five variables that capture a family's other debts; and, from 2013 to present, there are six variables that capture a family's other debts.

6 Relationship Identifiers

6.1 Parent records

PSID-SHELF provides the unique ID for every birth parent and adoptive parent that an individual ever reports in the survey. The total number of parent records is a count of how many parent IDs are attributed to an individual (`REL_PAR_TOT`). The variable ranges between 0 and 4, inclusive of both birth and adoptive parents.

Each individual has a total of six parental identifiers: (1) the unique ID for a birth father (`REL_PAR_BF_ID`); (2) the unique ID for a birth mother (`REL_PAR_BM_ID`); (3–4) the unique ID for up to two adoptive fathers (`REL_PAR_AF1_ID, REL_PAR_AF2_ID`); and (5–6) the unique ID for up to two adoptive mothers (`REL_PAR_AM1_ID, REL_PAR_AM2_ID`). Individuals are assigned missing values when they do not have a particular parent record. At present, no individual has more than four parent records on file.

Using these parent records, an individual can be linked directly to their parent(s), if they were ever observed in a PSID family unit. Parent identifiers are also generated for any parent who is ever mentioned by a respondent, during the survey interview, even if the parent was never directly observed in a PSID family unit. When a never-observed parent is mentioned in the survey interview, they are assigned a person number of 800 or higher. The assignment of a unique ID to never-observed family members allows the PSID to keep track of an individual's family members, in case they are mentioned in a subsequent interview.

6.2 Child records

PSID-SHELF provides the unique IDs for every child that an individual ever reports in the survey. The total number of child records is a count of how many child IDs are attributed to an individual (`REL_CHI_TOT`). There is a separate indicator for the reported number of children, with or without records (`REL_CHI_REP`). In most cases, these two measures provide equal values. However, there are a number of cases in which an individual reports having a child for whom there is not a corresponding child record with an assigned unique ID.

Each individual can have up to 20 child records. For each child, PSID-SHELF includes three child-specific identifiers: (1) the unique ID for each child (`REL_CHI1_ID`,

The complete list of Relationship Identifier Variables can be found on p. 63.

REL_CHI2_ID, REL_CHI3_ID, [...] REL_CHI20_ID); (2) the type of record for each child (REL_CHI1_TYPE, [...] REL_CHI20_TYPE); and (3) the reported birth year for each child (REL_CHI1_BYEAR, [...] REL_CHI20_BYEAR). For the type-of-record variables, there are two potential values (biological child; adopted child). Individuals are assigned missing values when they do not have a particular child record.

Using these child records, an individual can be linked directly to their child(ren), if they were ever observed in a PSID family unit. Child identifiers are also generated for any child who is ever mentioned by a respondent, during the survey interview, even if the child was never directly observed in a PSID family unit. When a never-observed child is mentioned in the survey interview, they are assigned a person number of 800 or higher. The assignment of a unique ID to never-observed family members allows the PSID to keep track of an individual's family members, in case they are mentioned in a subsequent interview.

Additionally, there are a number of individuals who have missing values for the variable that identifies the reported number of children (i.e., REL_CHI_REP), because questions about an individual's child and adoption history were not added to the PSID survey interview until 1985. However, every individual in the survey has a nonmissing value on the variable for the total number of child records (i.e., REL_CHI_TOT), since it provides a count of the total number of child records that can be attributed to an individual.

6.3 Marriage records

The PSID also tracks every legal marriage that an individual has entered into, which includes the unique ID of the spouse and the years of union formation, separation, and dissolution. The total number of marriage records is a count of how many spouse IDs are attributed to an individual (REL_MAR_TOT). There is a separate indicator for the reported number of marriages, with or without records (REL_MAR_REP). In most cases, these two measures provide equal values. However, there are a number of cases in which an individual reports more marriages than the number of spousal records that the PSID has on file for an individual.

Each individual can have up to eight marriage records. For each marriage, PSID-SHELF includes four marriage-specific identifiers: (1) the unique ID that is assigned to the spouse in each marriage (REL_MAR1_ID, REL_MAR2_ID, REL_MAR3_ID, [...] REL_MAR8_ID); (2) the year of union formation for each marriage (REL_MAR1_MYEAR, [...] REL_MAR8_MYEAR); (3) the year of union separation for each marriage (REL_MAR1_SYEAR, [...] REL_MAR8_SYEAR); and (4) the year of union dissolution for each marriage (REL_MAR1_DYEAR, [...] REL_MAR8_DYEAR). Individuals are assigned missing values when they do not have a particular marriage record.

Using these marriage records, an individual can be linked directly to any spouse who the individual was legally married to, if they were ever observed in a PSID family unit. This includes marriages that occur prior to the first year in which an individual enters the survey. When a never-observed spouse is mentioned in the survey interview, they are assigned a person number of 800 or higher. The assignment of a unique ID to

never-observed family members allows the PSID to keep track of an individual's family members, in case they are mentioned in a subsequent interview.

Although the PSID makes every effort to assign a unique ID to never-observed family members, the PSID does not always have sufficient information about a specific and identifiable spouse, in order to create a distinct marriage record.

7 Data Identifiers

There are three administrative variables that provide data records for the PSID-SHELF.

In each data file, there is (1) a retrieval date of the PSID Main Study that was used to generate the current PSID-SHELF data (`PSID_RETRIEVE`); and (2) a compile date of PSID-SHELF (`PSIDSHELF_COMPILE`). The retrieval date provides a record of when the PSID source files were downloaded from the PSID website (i.e., all 42 waves of family files, 1968–2021, and the cross-year individual file, 1968–2021, release number 3). The compile date provides a record of when the PSID-SHELF was last generated (and compressed into a zipped folder).

Finally, there is (3) a release number that denotes the version of PSID-SHELF that the user has downloaded (`PSIDSHELF_RELEASE`). Every release number specifies the year in which the data were published and the number of updates that have been made to the data file during the calendar year. For example, the current document describes PSID-SHELF with a data version number of "2025-01".

The complete list of Data Identifier Variables can be found on p. 65.

8 Variable List

8.1 Basic Terminology in PSID-SHELF

Family roles

FU	Family unit
HHD	Household dwelling (the physical lodging in which one or more FUs are living)
Resp	Respondent (refers to the individual who completed the FU's survey interview)
Ind	Individual (refers to any member of the FU)
RP	Reference person (refers to the person with the most financial responsibility for the FU; when there is a male-female reference couple, the male partner is typically designated the reference person, unless they are incapacitated or unwilling to fulfill the functions of RP)
SP	Spouse/partner (refers to the RP's legal spouse or cohabiting partner)
RC	Reference couple (refers to the RP and SP—or just the RP, if there is no SP present)

A list of common variable naming conventions

--1M	A variable that provides the first of multiple possible reports ("mention 1")
--2M	A variable that provides the second of multiple possible reports ("mention 2")
--3M	A variable that provides the third of multiple possible reports ("mention 3")
--4M	A variable that provides the fourth of multiple possible reports ("mention 4")
--MM	A variable that is generated based on all possible reports ("from multi mention")
--MAJ	A variable that denotes Ind's majority response across all waves ("maj ever")
--MAX	A variable that denotes Ind's highest-ever reported value ("max ever response")
--EXT	A variable that supplements a primary measure with an expanded number of values ("extended")
--COL	A variable that supplements a primary measure with a reduced number of values ("collapsed")
--ND	A variable in U.S. dollars at the time of survey ("nominal USD")
--NDF	A variable in U.S. dollars at the time of survey, adjusted for family size ("nominal USD, fam size adj")
--RD	A variable in inflation-adjusted U.S. dollars ("real USD 2023")
--RDF	A variable in inflation-adjusted U.S. dollars, adjusted for family size ("real USD 2023, fam size adj")
--RP	A variable that denotes the RP's response, assigned to every member of the FU
--SP	A variable that denotes the SP's response, assigned to every member of the FU

8.2 Survey Identifier Variables

(A substantive overview of the Survey Identifiers can be found on p. 4.)

8.2.1 Survey identifiers

ID	Unique ID
YEAR	Survey year
LINEAGE	Lineage, 1968 family unit ID
PNUM	Person number
FUID	Family unit ID, wave-specific
HHDID	Household dwelling ID, wave-specific
RESPONDENT	Respondent who completed FU's interview

RESPONDENT_EXT	Respondent who completed FU's interview, extended
RINDIV	Ind is the current respondent who completed FU's interview?
REL	Ind's relationship to FU's reference person
REL_EXT	Ind's relationship to FU's reference person, extended
REFCOUPLE	Ind is a current member of FU's reference couple? (RP or SP)
SAMPLE	Sample membership
SAMPSTAT	Sample person status
SAMPSTAT_EXT	Sample person status, extended

8.2.2 Panel status

SEQNUM	Ind's sequence number in FU's interview
RESPONSE	Ind's response/reason for nonresponse
RESPONSE_EXT	Ind's response/reason for nonresponse, extended
PANEL_CURRENT	Ind's panel status, assoc with PSID FU, current member of FU?
PANEL_INST	Ind's panel status, assoc with PSID FU, lives in institution?
PANEL_MOVE	Ind's panel status, assoc with PSID FU, moved out since last wave?
PANEL_DROP_STAT	FU's panel status, SEO sample drop, status
PANEL_DROP_REIN	FU's panel status, SEO sample drop, FU was reinstated after 1997?
PANEL_REIN_ELIG	FU's panel status, SEO reinstatement, FU has Ind from 1997 CDS-elig FU?

8.2.3 Sample weights and complex survey design

FW	FU's family weight, longitudinal
FW_CROSS	FU's family weight, cross-sectional
FW_LATIN_MAIN	FU's family weight, longitudinal, Latino and main samples
FW_LATIN_ONLY	FU's family weight, longitudinal, Latino sample only
IW	Ind's individual weight, longitudinal
IW_CROSS	Ind's individual weight, cross-sectional
IW_LATIN_MAIN	Ind's individual weight, longitudinal, Latino and main samples
IW_LATIN_ONLY	Ind's individual weight, longitudinal, Latino sample only
STRATUM	Sample stratum (for calculating sampling variance/errors)
CLUSTER	Sample cluster (for calculating samplng variance/errors)

8.3 Social Characteristic Variables

(A substantive overview of the Social Characteristics can be found on p. 15.)

8.3.1 Demographics

DEMO_SEX	Ind's demographics, sex
DEMO_BIRTH_YEAR	Ind's demographics, birth year
DEMO_BIRTH_MONTH	Ind's demographics, birth month
DEMO_DEATH_REP	Ind's demographics, death ever reported?
DEMO_DEATH_YEAR	Ind's demographics, death year
DEMO_AGE_GEN	Ind's demographics, age, generated from birth year
DEMO_AGE_REP	Ind's demographics, age, reported by respondent at time of interview

8.3.2 Education

EDU_YEAR	Ind's education, total years of schooling
EDU_YEAR_RP	RP's education, total years of schooling
EDU_YEAR_SP	SP's education, total years of schooling
EDU_YEAR_MAX	Ind's education, total years of schooling, max ever
EDU_YEAR_MAX_RP	RP's education, total years of schooling, max ever
EDU_YEAR_MAX_SP	SP's education, total years of schooling, max ever
EDU_LEVEL	Ind's education, highest level of education
EDU_LEVEL_RP	RP's education, highest level of education
EDU_LEVEL_SP	SP's education, highest level of education
EDU_LEVEL_MAX	Ind's education, highest level of education, max ever
EDU_LEVEL_MAX_RP	RP's education, highest level of education, max ever
EDU_LEVEL_MAX_SP	SP's education, highest level of education, max ever
EDU_GRDE	Ind's education, highest grade completed
EDU_HSCH	Ind's education, high school graduation status
EDU_COLL_ATT	Ind's education, college, ever attended?
EDU_COLL_DEG	Ind's education, college, highest degree type
EDU_COLL_GRA	Ind's education, college, received degree?
EDU_COLL_NUM	Ind's education, college, number of years completed
EDU_ICOL_ATT	Ind's education, international college, ever attended?
EDU_ICOL_DEG	Ind's education, international college, highest degree type

8.3.3 Family type

FAM_SIZE	FU's family type, total number of people living in FU
FAM_SIZE_CHI	FU's family type, number of children under 18 living in FU
FAM_PARTNERED	FU's family type, RP has a spouse or partner who lives in FU?
FAM_PARSTAT	FU's family type, partnership status of RP
FAM_PARTYPE	FU's family type, RP's current partner type
FAM_MARRIED	FU's family type, RP is legally married to spouse who lives in FU?
FAM_MARSTAT	FU's family type, legal marital status of RP

8.3.4 Geography

GEO_REGION	FU's geography, current region
GEO_STATE	FU's geography, current state
GEO_METRO	FU's geography, currently live in metro area?
CGEO_REGION	Ind's childhood geography, region where grew up
CGEO_STATE	Ind's childhood geography, state where grew up

8.3.5 Race and ethnicity

RACE_ETH_MAJ	Ind's race/ethnicity, from first mention, maj ever
RACE_ETH_MAJ_COL	Ind's race/ethnicity, from first mention, maj ever, collapsed
RACE_ETH_MM_MAJ	Ind's race/ethnicity, from multi mention, maj ever
RACE_ETH_MM_MAJ_COL	Ind's race/ethnicity, from multi mention, maj ever, collapsed
RACE_ETH_MAJ_RP	RP's race/ethnicity, from first mention, maj ever
RACE_ETH_MAJ_SP	SP's race/ethnicity, from first mention, maj ever
RACE_ETH_MAJ_COL_RP	RP's race/ethnicity, from first mention, maj ever, collapsed
RACE_ETH_MAJ_COL_SP	SP's race/ethnicity, from first mention, maj ever, collapsed
RACE_ETH_MM_MAJ_RP	RP's race/ethnicity, from multi mention, maj ever
RACE_ETH_MM_MAJ_SP	SP's race/ethnicity, from multi mention, maj ever
RACE_ETH_MM_MAJ_COL_RP	RP's race/ethnicity, from multi mention, maj ever, collapsed

RACE_ETH_MM_MAJ_COL_SP	SP's race/ethnicity, from multi mention, maj ever, collapsed
ETH_ONLY_SPAN	Ind's ethnic origin only, Spanish descent
RACE_ONLY_1M	Ind's race only, mention 1
RACE_ONLY_2M	Ind's race only, mention 2
RACE_ONLY_3M	Ind's race only, mention 3
RACE_ONLY_4M	Ind's race only, mention 4

8.3.6 Time use

TIME_ACAR	Ind's time use, care for adult, hours in typical week
TIME_CCAR	Ind's time use, care for child, hours in typical week
TIME_EDUC	Ind's time use, educational activities, hours in typical week
TIME_HOUS	Ind's time use, housework, hours in typical week
TIME_LEIS	Ind's time use, leisure activities, hours in typical week
TIME_PERS	Ind's time use, personal care, hours in typical week
TIME_SHOP	Ind's time use, shopping, hours in typical week
TIME_VOLU	Ind's time use, volunteering, hours in typical week
TIME_WORK	Ind's time use, paid work, hours in typical week

8.4 Health Characteristic Variables

(A substantive overview of the Health Characteristics can be found on p. 25.)

8.4.1 Chronic conditions

CCON_ARTH_DIAG_ANY	Ind's chron cond, arthritis, diagnosis, any ever?
CCON_ARTH_DIAG_AGE	Ind's chron cond, arthritis, diagnosis, age of first
CCON_ARTH_DEGR	Ind's chron cond, arthritis, degree of limitation
CCON_ARTH_CARE	Ind's chron cond, arthritis, gets care, meds/treat?
CCON_ASTH_DIAG_ANY	Ind's chron cond, asthma, diagnosis, any ever?
CCON_ASTH_DIAG_AGE	Ind's chron cond, asthma, diagnosis, age of first
CCON_ASTH_DEGR	Ind's chron cond, asthma, degree of limitation
CCON_ASTH_CARE	Ind's chron cond, asthma, gets care, meds?
CCON_CANC_DIAG_ANY	Ind's chron cond, cancer, diagnosis, any ever?
CCON_CANC_DIAG_AGE	Ind's chron cond, cancer, diagnosis, age of first
CCON_CANC_DEGR	Ind's chron cond, cancer, degree of limitation
CCON_CANC_STAT	Ind's chron cond, cancer, treatment status
CCON_CANC_TYPE_1M	Ind's chron cond, cancer, type, mention 1
CCON_CANC_TYPE_2M	Ind's chron cond, cancer, type, mention 2
CCON_DIAB_DIAG_ANY	Ind's chron cond, diabetes, diagnosis, any ever?
CCON_DIAB_DIAG_AGE	Ind's chron cond, diabetes, diagnosis, age of first
CCON_DIAB_DEGR	Ind's chron cond, diabetes, degree of limitation
CCON_DIAB_CARE	Ind's chron cond, diabetes, gets care, meds/equip?
CCON_EMOP_DIAG_ANY	Ind's chron cond, emo/psych prob, diagnosis, any ever?
CCON_EMOP_DIAG_AGE	Ind's chron cond, emo/psych prob, diagnosis, age of first
CCON_EMOP_DEGR	Ind's chron cond, emo/psych prob, degree of limitation
CCON_EMOP_CARE	Ind's chron cond, emo/psych prob, gets care, meds?
CCON_EMOP_TYPE_1M	Ind's chron cond, emo/psych prob, type, mention 1
CCON_EMOP_TYPE_2M	Ind's chron cond, emo/psych prob, type, mention 2
CCON_EMOP_TYPE_3M	Ind's chron cond, emo/psych prob, type, mention 3
CCON_HATT_DIAG_ANY	Ind's chron cond, heart attack, diagnosis, any ever?
CCON_HATT_DIAG_AGE	Ind's chron cond, heart attack, diagnosis, age of first
CCON_HATT_DIAG_2ND	Ind's chron cond, heart attack, diagnosis, second ever?

CCON_HATT_DEGR	Ind's chron cond, heart attack, degree of limitation
CCON_HATT_CARE	Ind's chron cond, heart attack, gets care, meds?
CCON_HDIS_DIAG_ANY	Ind's chron cond, heart disease, diagnosis, any ever?
CCON_HDIS_DIAG_AGE	Ind's chron cond, heart disease, diagnosis, age of first
CCON_HDIS_DEGR	Ind's chron cond, heart disease, degree of limitation
CCON_HDIS_CARE	Ind's chron cond, heart disease, gets care, meds?
CCON_HIBP_DIAG_ANY	Ind's chron cond, high blood pres, diagnosis, any ever?
CCON_HIBP_DIAG_AGE	Ind's chron cond, high blood pres, diagnosis, age of first
CCON_HIBP_DEGR	Ind's chron cond, high blood pres, degree of limitation
CCON_HIBP_CARE	Ind's chron cond, high blood pres, gets care, meds?
CCON_LDIS_DIAG_ANY	Ind's chron cond, learning disord, diagnosis, any ever?
CCON_LDIS_DIAG_AGE	Ind's chron cond, learning disord, diagnosis, age of first
CCON_LDIS_DEGR	Ind's chron cond, learning disord, degree of limitation
CCON_LDIS_CARE	Ind's chron cond, learning disorder, gets care, meds/treat?
CCON_LMEM_DIAG_ANY	Ind's chron cond, loss mem/ment abil, diagnosis, any ever?
CCON_LMEM_DIAG_AGE	Ind's chron cond, loss mem/ment abil, diagnosis, age of first
CCON_LMEM_DEGR	Ind's chron cond, loss mem/ment abil, degree of limitation
CCON_LMEM_CARE	Ind's chron cond, loss mem/ment abil, gets care, meds?
CCON_LUNG_DIAG_ANY	Ind's chron cond, lung disease, diagnosis, any ever?
CCON_LUNG_DIAG_AGE	Ind's chron cond, lung disease, diagnosis, age of first
CCON_LUNG_DEGR	Ind's chron cond, lung disease, degree of limitation
CCON_LUNG_CARE	Ind's chron cond, lung disease, gets care, meds/treat?
CCON_STRO_DIAG_ANY	Ind's chron cond, stroke, diagnosis, any ever?
CCON_STRO_DIAG_AGE	Ind's chron cond, stroke, diagnosis, age of first
CCON_STRO_DIAG_2ND	Ind's chron cond, stroke, diagnosis, second ever?
CCON_STRO_DEGR	Ind's chron cond, stroke, degree of limitation
CCON_STRO_CARE	Ind's chron cond, stroke, gets care, meds?
CCON_OCON_DIAG_ANY	Ind's chron cond, other cond, diagnosis, any ever?
CCON_OCON_DIAG_AGE	Ind's chron cond, other cond, diagnosis, age of first
CCON_OCON_DEGR	Ind's chron cond, other cond, degree of limitation
CCON_OCON_CARE	Ind's chron cond, other cond, gets care, meds?
CCON_OCON_TYPE	Ind's chron cond, other cond, type

8.4.2 COVID-19

COVID_VACC	Ind's COVID-19, vaccine, ever received?
COVID_POSI	Ind's COVID-19, positive (diag or presumed), ever had?
COVID_MEDI	Ind's COVID-19, medical pro, ever talked to about COVID-19?
COVID_TEST	Ind's COVID-19, test, ever taken?
COVID_DIAG	Ind's COVID-19, confirmed diag (by medical pro, test), any ever?
COVID_SYMP	Ind's COVID-19, symptoms, any ever?
COVID_HOSP_ANY	Ind's COVID-19, hospital admission, any ever?
COVID_HOSP_NUM	Ind's COVID-19, hospital admission, number of nights
COVID_HOSP_TREAT_ICU	Ind's COVID-19, hospital admission, treatment, ICU?
COVID_HOSP_TREAT_OXY	Ind's COVID-19, hospital admission, treatment, oxygen?
COVID_HOSP_TREAT_VEN	Ind's COVID-19, hospital admission, treatment, ventilator?
COVID_HOSP_TREAT_OTH	Ind's COVID-19, hospital admission, treatment, other?
COVID_LING_ANY	Ind's COVID-19, lingering effects, any ever?
COVID_LING_TYPE	Ind's COVID-19, lingering effects, type
COVID_LING_SEV	Ind's COVID-19, lingering effects, severity

8.4.3 Dementia

DMNT_SCORE_TOT	Ind's dementia, AD8 dementia screener, tot score
DMNT_SCORE_CUT	Ind's dementia, AD8 dementia screener, 2+ score?
DMNT_ELIG	Ind's dementia, eligible for screener? (age 65 or older)
DMNT_Q1_ANY	Ind's dementia, screener Q1, make decisions, any change?
DMNT_Q2_ANY	Ind's dementia, screener Q2, interest activities, any change?
DMNT_Q3_ANY	Ind's dementia, screener Q3, repeat stories, any change?
DMNT_Q4_ANY	Ind's dementia, screener Q4, learn to use devices, any change?
DMNT_Q5_ANY	Ind's dementia, screener Q5, forget the date, any change?
DMNT_Q6_ANY	Ind's dementia, screener Q6, handle bills/money, any change?
DMNT_Q7_ANY	Ind's dementia, screener Q7, remember appointment, any change?
DMNT_Q8_ANY	Ind's dementia, screener Q8, daily thinking/mem, any change?

8.4.4 Depression

DEP_SCORE_TOT	Ind's depression, K6 psych distress screener, tot score
DEP_SCORE_CUT	Ind's depression, K6 psych distress screener, 13+ score?
DEP_DEGR	Ind's depression, degree of interference with life/activities
DEP_Q1_FREQ	Ind's depression, screener Q1, sadness, freq 30 days
DEP_Q2_FREQ	Ind's depression, screener Q2, nervousness, freq 30 days
DEP_Q3_FREQ	Ind's depression, screener Q3, restlessness, freq 30 days
DEP_Q4_FREQ	Ind's depression, screener Q4, hopelessness, freq 30 days
DEP_Q5_FREQ	Ind's depression, screener Q5, everything effort, freq 30 days
DEP_Q6_FREQ	Ind's depression, screener Q6, worthlessness, freq 30 days

8.4.5 Disability

ADL_SUM_TOT	Ind's disability, summary of ADL instrument, tot count
ADL_SUM_ANY	Ind's disability, summary of ADL instrument, 1+ difficulties?
ADL_Q1_ANY	Ind's disability, ADL Q1, bath/shower self, any difficulty?
ADL_Q1_HLP	Ind's disability, ADL Q1, bath/shower self, receives help?
ADL_Q2_ANY	Ind's disability, ADL Q2, dress self, any difficulty?
ADL_Q2_HLP	Ind's disability, ADL Q2, dress self, receives help?
ADL_Q3_ANY	Ind's disability, ADL Q3, feed self, any difficulty?
ADL_Q3_HLP	Ind's disability, ADL Q3, feed self, receives help?
ADL_Q4_ANY	Ind's disability, ADL Q4, move from bed/chair, any difficulty?
ADL_Q4_HLP	Ind's disability, ADL Q4, move from bed/chair, receives help?
ADL_Q5_ANY	Ind's disability, ADL Q5, walk without assist, any difficulty?
ADL_Q5_HLP	Ind's disability, ADL Q5, walk without assist, receives help?
ADL_Q6_ANY	Ind's disability, ADL Q6, get outside, any difficulty?
ADL_Q6_HLP	Ind's disability, ADL Q6, get outside, receives help?
ADL_Q7_ANY	Ind's disability, ADL Q7, use/get to toilet, any difficulty?
ADL_Q7_HLP	Ind's disability, ADL Q7, use/get to toilet, receives help?
IADL_SUM_TOT	Ind's disability, summary of IADL instrument, tot count
IADL_SUM_ANY	Ind's disability, summary of IADL instrument, 1+ difficulties?
IADL_Q1_ANY	Ind's disability, IADL Q1, prepare own meals, any difficulty?
IADL_Q1_HEA	Ind's disability, IADL Q1, prepare own meals, health reason?
IADL_Q2_ANY	Ind's disability, IADL Q2, shop toilet/meds, any difficulty?
IADL_Q2_HEA	Ind's disability, IADL Q2, shop toilet/meds, health reason?
IADL_Q3_ANY	Ind's disability, IADL Q3, manage bills/money, any difficulty?
IADL_Q3_HEA	Ind's disability, IADL Q3, manage bills/money, health reason?
IADL_Q4_ANY	Ind's disability, IADL Q4, use phone, any difficulty?

IADL_Q4_HEA	Ind's disability, IADL Q4, use phone, health reason?
IADL_Q5_ANY	Ind's disability, IADL Q5, do heavy housework, any difficulty?
IADL_Q5_HEA	Ind's disability, IADL Q5, do heavy housework, health reason?
IADL_Q6_ANY	Ind's disability, IADL Q6, do light housework, any difficulty?
IADL_Q6_HEA	Ind's disability, IADL Q6, do light housework, health reason?

8.4.6 General wellbeing

NHLTH_BIRTH_WGHT	Ind's neonatal health, birth weight, total, ounces
GHLTH_STAT	Ind's general health, current status
GHLTH_POOR	Ind's general health, currently in poor health?
GHLTH_CHNG	Ind's general health, change from two years ago?
HOSP_ANY	Ind's hospitalization, any admissions? (prev year)
HOSP_NUM	Ind's hospitalization, number of nights (prev year)
BODY_HGHT_IN	Ind's body, current height, total, inches
BODY_HGHT_CM	Ind's body, current height, total, centimeters
BODY_WGHT_LB	Ind's body, current weight, total, pounds
BODY_WGHT_KG	Ind's body, current weight, total, kilograms
LIFE_STAT	Ind's general life satisfaction, current status

8.5 Economic Characteristic Variables

(A substantive overview of the Economic Characteristics can be found on p. 38.)

8.5.1 Earnings

EARN_TOT_ND	Ind's earnings, tot labor inc (nominal USD), tax yr
EARN_TOT_NDF	Ind's earnings, tot labor inc (nominal USD, fam size adj), tax yr
EARN_TOT_RD	Ind's earnings, tot labor inc (real USD 2023), tax yr
EARN_TOT_RDF	Ind's earnings, tot labor inc (real USD 2023, fam size adj), tax yr
EARN_TOT_ND_RP	RP's earnings, tot labor inc (nominal USD), tax yr
EARN_TOT_ND_SP	SP's earnings, tot labor inc (nominal USD), tax yr
EARN_TOT_NDF_RP	RP's earnings, tot labor inc (nominal USD, fam size adj), tax yr
EARN_TOT_NDF_SP	SP's earnings, tot labor inc (nominal USD, fam size adj), tax yr
EARN_TOT_RD_RP	RP's earnings, tot labor inc (real USD 2023), tax yr
EARN_TOT_RD_SP	SP's earnings, tot labor inc (real USD 2023), tax yr
EARN_TOT_RDF_RP	RP's earnings, tot labor inc (real USD 2023, fam size adj), tax yr
EARN_TOT_RDF_SP	SP's earnings, tot labor inc (real USD 2023, fam size adj), tax yr

8.5.2 Employment

EMP_STAT_1M	Ind's employment, current status, mention 1
EMP_STAT_2M	Ind's employment, current status, mention 2
EMP_STAT_3M	Ind's employment, current status, mention 3
EMP_STAT_1M_RP	RP's employment, current status, mention 1
EMP_STAT_2M_RP	RP's employment, current status, mention 2
EMP_STAT_3M_RP	RP's employment, current status, mention 3
EMP_STAT_1M_SP	SP's employment, current status, mention 1
EMP_STAT_2M_SP	SP's employment, current status, mention 2
EMP_STAT_3M_SP	SP's employment, current status, mention 3
EMP_WORK	Ind's employment, working now? from first mention
EMP_WORK_RP	RP's employment, working now? from first mention
EMP_WORK_SP	SP's employment, working now? from first mention

EMP_WORK_MM	Ind's employment, working now? from multi mention
EMP_WORK_MM_RP	RP's employment, working now? from multi mention
EMP_WORK_MM_SP	SP's employment, working now? from multi mention

8.5.3 Expenditures

EXPN_TOT_ND	FU's expend, tot spending (nominal USD), tax yr
EXPN_TOT_NDF	FU's expend, tot spending (nominal USD, fam size adj), tax yr
EXPN_TOT_RD	FU's expend, tot spending (real USD 2023), tax yr
EXPN_TOT_RDF	FU's expend, tot spending (real USD 2023, fam size adj), tax yr
EXPN_TOT_IRV_ND	FU's expend, tot, incl rent val (nominal USD), tax yr
EXPN_TOT_IRV_NDF	FU's expend, tot, incl rent val (nominal USD, fam size adj), tax yr
EXPN_TOT_IRV_RD	FU's expend, tot, incl rent val (real USD 2023), tax yr
EXPN_TOT_IRV_RDF	FU's expend, tot, incl rent val (real USD 2023, fam size adj), tax yr
EXPN_CCAR_TOT_ND	FU's expend, comp, childcare, tot val (nominal USD), tax yr
EXPN_CCAR_TOT_NDF	FU's expend, comp, childcare, tot val (nominal USD, fam size adj), tax yr
EXPN_CCAR_TOT_RD	FU's expend, comp, childcare, tot val (real USD 2023), tax yr
EXPN_CCAR_TOT_RDF	FU's expend, comp, childcare, tot val (real USD 2023, fam size adj), tax yr
EXPN_CLOT_TOT_ND	FU's expend, comp, clothing, tot val (nominal USD), tax yr
EXPN_CLOT_TOT_NDF	FU's expend, comp, clothing, tot val (nominal USD, fam size adj), tax yr
EXPN_CLOT_TOT_RD	FU's expend, comp, clothing, tot val (real USD 2023), tax yr
EXPN_CLOT_TOT_RDF	FU's expend, comp, clothing, tot val (real USD 2023, fam size adj), tax yr
EXPN_COMP_TOT_ND	FU's expend, comp, computing, tot val (nominal USD), tax yr
EXPN_COMP_TOT_NDF	FU's expend, comp, computing, tot val (nominal USD, fam size adj), tax yr
EXPN_COMP_TOT_RD	FU's expend, comp, computing, tot val (real USD 2023), tax yr
EXPN_COMP_TOT_RDF	FU's expend, comp, computing, tot val (real USD 2023, fam size adj), tax yr
EXPN_EDUC_TOT_ND	FU's expend, comp, education, tot val (nominal USD), tax yr
EXPN_EDUC_TOT_NDF	FU's expend, comp, education, tot val (nominal USD, fam size adj), tax yr
EXPN_EDUC_TOT_RD	FU's expend, comp, education, tot val (real USD 2023), tax yr
EXPN_EDUC_TOT_RDF	FU's expend, comp, education, tot val (real USD 2023, fam size adj), tax yr
EXPN_FOOD_TOT_ND	FU's expend, comp, food, tot val (nominal USD), tax yr
EXPN_FOOD_TOT_NDF	FU's expend, comp, food, tot val (nominal USD, fam size adj), tax yr
EXPN_FOOD_TOT_RD	FU's expend, comp, food, tot val (real USD 2023), tax yr
EXPN_FOOD_TOT_RDF	FU's expend, comp, food, tot val (real USD 2023, fam size adj), tax yr
EXPN_HLTH_TOT_ND	FU's expend, comp, health, tot val (nominal USD), tax yr
EXPN_HLTH_TOT_NDF	FU's expend, comp, health, tot val (nominal USD, fam size adj), tax yr
EXPN_HLTH_TOT_RD	FU's expend, comp, health, tot val (real USD 2023), tax yr
EXPN_HLTH_TOT_RDF	FU's expend, comp, health, tot val (real USD 2023, fam size adj), tax yr
EXPN_HLTH_DOC_ND	FU's expend, comp, health, doctors (nominal USD), tax yr
EXPN_HLTH_DOC_NDF	FU's expend, comp, health, doctors (nominal USD, fam size adj), tax yr
EXPN_HLTH_DOC_RD	FU's expend, comp, health, doctors (real USD 2023), tax yr
EXPN_HLTH_DOC_RDF	FU's expend, comp, health, doctors (real USD 2023, fam size adj), tax yr
EXPN_HLTH_HOS_ND	FU's expend, comp, health, hospitals (nominal USD), tax yr
EXPN_HLTH_HOS_NDF	FU's expend, comp, health, hospitals (nominal USD, fam size adj), tax yr
EXPN_HLTH_HOS_RD	FU's expend, comp, health, hospitals (real USD 2023), tax yr
EXPN_HLTH_HOS_RDF	FU's expend, comp, health, hospitals (real USD 2023, fam size adj), tax yr
EXPN_HLTH_INS_ND	FU's expend, comp, health, insurance (nominal USD), tax yr
EXPN_HLTH_INS_NDF	FU's expend, comp, health, insurance (nominal USD, fam size adj), tax yr
EXPN_HLTH_INS_RD	FU's expend, comp, health, insurance (real USD 2023), tax yr
EXPN_HLTH_INS_RDF	FU's expend, comp, health, insurance (real USD 2023, fam size adj), tax yr
EXPN_HLTH_PRE_ND	FU's expend, comp, health, prescrip (nominal USD), tax yr
EXPN_HLTH_PRE_NDF	FU's expend, comp, health, prescrip (nominal USD, fam size adj), tax yr
EXPN_HLTH_PRE_RD	FU's expend, comp, health, prescrip (real USD 2023), tax yr

EXPN_HLTH_PRE_RDF	FU's expend, comp, health, prescrip (real USD 2023, fam size adj), tax yr
EXPN_HOUS_TOT_ND	FU's expend, comp, housing, tot val (nominal USD), tax yr
EXPN_HOUS_TOT_NDF	FU's expend, comp, housing, tot val (nominal USD, fam size adj), tax yr
EXPN_HOUS_TOT_RD	FU's expend, comp, housing, tot val (real USD 2023), tax yr
EXPN_HOUS_TOT_RDF	FU's expend, comp, housing, tot val (real USD 2023, fam size adj), tax yr
EXPN_OREC_TOT_ND	FU's expend, comp, other rec, tot val (nominal USD), tax yr
EXPN_OREC_TOT_NDF	FU's expend, comp, other rec, tot val (nominal USD, fam size adj), tax yr
EXPN_OREC_TOT_RD	FU's expend, comp, other rec, tot val (real USD 2023), tax yr
EXPN_OREC_TOT_RDF	FU's expend, comp, other rec, tot val (real USD 2023, fam size adj), tax yr
EXPN_TRAN_TOT_ND	FU's expend, comp, transport, tot val (nominal USD), tax yr
EXPN_TRAN_TOT_NDF	FU's expend, comp, transport, tot val (nominal USD, fam size adj), tax yr
EXPN_TRAN_TOT_RD	FU's expend, comp, transport, tot val (real USD 2023), tax yr
EXPN_TRAN_TOT_RDF	FU's expend, comp, transport, tot val (real USD 2023, fam size adj), tax yr
EXPN_TRIP_TOT_ND	FU's expend, comp, trips, tot val (nominal USD), tax yr
EXPN_TRIP_TOT_NDF	FU's expend, comp, trips, tot val (nominal USD, fam size adj), tax yr
EXPN_TRIP_TOT_RD	FU's expend, comp, trips, tot val (real USD 2023), tax yr
EXPN_TRIP_TOT_RDF	FU's expend, comp, trips, tot val (real USD 2023, fam size adj), tax yr

8.5.4 Family income

FINC_TOT_ND	FU's family income, total (nominal USD), tax yr
FINC_TOT_NDF	FU's family income, total (nominal USD, fam size adj), tax yr
FINC_TOT_RD	FU's family income, total (real USD 2023), tax yr
FINC_TOT_RDF	FU's family income, total (real USD 2023, fam size adj), tax yr

8.5.5 Occupations

OCC_1970C	Ind's occupation, 1970 code (COC1970)
OCC_2000C_1M	Ind's occupation, 2000 code (COC2000), mention 1
OCC_2000C_2M	Ind's occupation, 2000 code (COC2000), mention 2
OCC_2000C_3M	Ind's occupation, 2000 code (COC2000), mention 3
OCC_2000C_4M	Ind's occupation, 2000 code (COC2000), mention 4
OCC_2010C_1M	Ind's occupation, 2010 code (COC2010), mention 1
OCC_2010C_2M	Ind's occupation, 2010 code (COC2010), mention 2
OCC_2010C_3M	Ind's occupation, 2010 code (COC2010), mention 3
OCC_2010C_4M	Ind's occupation, 2010 code (COC2010), mention 4

8.5.6 Primary home

HOME_STAT	FU's primary home, current status, owner or pays rent
HOME_OWN_VAL_ND	FU's primary home, owner, house val (nominal USD)
HOME_OWN_VAL_NDF	FU's primary home, owner, house val (nominal USD, fam size adj)
HOME_OWN_VAL_RD	FU's primary home, owner, house val (real USD 2023)
HOME_OWN_VAL_RDF	FU's primary home, owner, house val (real USD 2023, fam size adj)
HOME_OWN_MOR_ANY_1M	FU's primary home, owner, has 1st mortgage?
HOME_OWN_MOR_ANY_2M	FU's primary home, owner, has 2nd mortgage?
HOME_OWN_MOR_ANY_3M	FU's primary home, owner, has 3rd mortgage?
HOME_OWN_MOR_VAL_1M_ND	FU's primary home, owner, 1st mortgage val (nominal USD)
HOME_OWN_MOR_VAL_1M_NDF	FU's primary home, owner, 1st mortgage val (nominal USD, fam size adj)
HOME_OWN_MOR_VAL_1M_RD	FU's primary home, owner, 1st mortgage val (real USD 2023)
HOME_OWN_MOR_VAL_1M_RDF	FU's primary home, owner, 1st mortgage val (real USD 2023, fam size adj)
HOME_OWN_MOR_VAL_2M_ND	FU's primary home, owner, 2nd mortgage val (nominal USD)
HOME_OWN_MOR_VAL_2M_NDF	FU's primary home, owner, 2nd mortgage val (nominal USD, fam size adj)

HOME_OWN_MOR_VAL_2M_RD	FU's primary home, owner, 2nd mortgage val (real USD 2023)
HOME_OWN_MOR_VAL_2M_RDF	FU's primary home, owner, 2nd mortgage val (real USD 2023, fam size adj)

8.5.7 Wealth

WLTH_TOT_NET_ND	FU's wealth, tot net worth (nominal USD)
WLTH_TOT_NET_NDF	FU's wealth, tot net worth (nominal USD, fam size adj)
WLTH_TOT_NET_RD	FU's wealth, tot net worth (real USD 2023)
WLTH_TOT_NET_RDF	FU's wealth, tot net worth (real USD 2023, fam size adj)
WLTH_TOT_NET_XH_ND	FU's wealth, tot net worth, excl home (nominal USD)
WLTH_TOT_NET_XH_NDF	FU's wealth, tot net worth, excl home (nominal USD, fam size adj)
WLTH_TOT_NET_XH_RD	FU's wealth, tot net worth, excl home (real USD 2023)
WLTH_TOT_NET_XH_RDF	FU's wealth, tot net worth, excl home (real USD 2023, fam size adj)
WLTH_TOT_NET_XHR_ND	FU's wealth, tot net wth, excl home/real est (nominal USD)
WLTH_TOT_NET_XHR_NDF	FU's wealth, tot net wth, excl home/real est (nominal USD, fam size adj)
WLTH_TOT_NET_XHR_RD	FU's wealth, tot net wth, excl home/real est (real USD 2023)
WLTH_TOT_NET_XHR_RDF	FU's wealth, tot net wth, excl home/real est (real USD 2023, fam size adj)
WLTH_TOT_ASS_ND	FU's wealth, tot assets (nominal USD)
WLTH_TOT_ASS_NDF	FU's wealth, tot assets (nominal USD, fam size adj)
WLTH_TOT_ASS_RD	FU's wealth, tot assets (real USD 2023)
WLTH_TOT_ASS_RDF	FU's wealth, tot assets (real USD 2023, fam size adj)
WLTH_TOT_ASS_XH_ND	FU's wealth, tot assets, excl home (nominal USD)
WLTH_TOT_ASS_XH_NDF	FU's wealth, tot assets, excl home (nominal USD, fam size adj)
WLTH_TOT_ASS_XH_RD	FU's wealth, tot assets, excl home (real USD 2023)
WLTH_TOT_ASS_XH_RDF	FU's wealth, tot assets, excl home (real USD 2023, fam size adj)
WLTH_TOT_ASS_XHR_ND	FU's wealth, tot assets, excl home/real est (nominal USD)
WLTH_TOT_ASS_XHR_NDF	FU's wealth, tot assets, excl home/real est (nominal USD, fam size adj)
WLTH_TOT_ASS_XHR_RD	FU's wealth, tot assets, excl home/real est (real USD 2023)
WLTH_TOT_ASS_XHR_RDF	FU's wealth, tot assets, excl home/real est (real USD 2023, fam size adj)
WLTH_TOT_DEB_ND	FU's wealth, tot debts, tot (nominal USD)
WLTH_TOT_DEB_NDF	FU's wealth, tot debts, tot (nominal USD, fam size adj)
WLTH_TOT_DEB_RD	FU's wealth, tot debts, tot (real USD 2023)
WLTH_TOT_DEB_RDF	FU's wealth, tot debts, tot (real USD 2023, fam size adj)
WLTH_TOT_DEB_XH_ND	FU's wealth, tot debts, excl home (nominal USD)
WLTH_TOT_DEB_XH_NDF	FU's wealth, tot debts, excl home (nominal USD, fam size adj)
WLTH_TOT_DEB_XH_RD	FU's wealth, tot debts, excl home (real USD 2023)
WLTH_TOT_DEB_XH_RDF	FU's wealth, tot debts, excl home (real USD 2023, fam size adj)
WLTH_TOT_DEB_XHR_ND	FU's wealth, tot debts, excl home/real est (nominal USD)
WLTH_TOT_DEB_XHR_NDF	FU's wealth, tot debts, excl home/real est (nominal USD, fam size adj)
WLTH_TOT_DEB_XHR_RD	FU's wealth, tot debts, excl home/real est (real USD 2023)
WLTH_TOT_DEB_XHR_RDF	FU's wealth, tot debts, excl home/real est (real USD 2023, fam size adj)
WLTH_HOME_NET_ND	FU's wealth, comp, primary home, net val (nominal USD)
WLTH_HOME_NET_NDF	FU's wealth, comp, primary home, net val (nominal USD, fam size adj)
WLTH_HOME_NET_RD	FU's wealth, comp, primary home, net val (real USD 2023)
WLTH_HOME_NET_RDF	FU's wealth, comp, primary home, net val (real USD 2023, fam size adj)
WLTH_HOME_ASS_ND	FU's wealth, comp, primary home, assets (nominal USD)
WLTH_HOME_ASS_NDF	FU's wealth, comp, primary home, assets (nominal USD, fam size adj)
WLTH_HOME_ASS_RD	FU's wealth, comp, primary home, assets (real USD 2023)
WLTH_HOME_ASS_RDF	FU's wealth, comp, primary home, assets (real USD 2023, fam size adj)
WLTH_HOME_DEB_ND	FU's wealth, comp, primary home, debts (nominal USD)
WLTH_HOME_DEB_NDF	FU's wealth, comp, primary home, debts (nominal USD, fam size adj)
WLTH_HOME_DEB_RD	FU's wealth, comp, primary home, debts (real USD 2023)
WLTH_HOME_DEB_RDF	FU's wealth, comp, primary home, debts (real USD 2023, fam size adj)

WLTH_REAL_NET_ND	FU's wealth, comp, real estate, net val (nominal USD)
WLTH_REAL_NET_NDF	FU's wealth, comp, real estate, net val (nominal USD, fam size adj)
WLTH_REAL_NET_RD	FU's wealth, comp, real estate, net val (real USD 2023)
WLTH_REAL_NET_RDF	FU's wealth, comp, real estate, net val (real USD 2023, fam size adj)
WLTH_REAL_ASS_ND	FU's wealth, comp, real estate, assets (nominal USD)
WLTH_REAL_ASS_NDF	FU's wealth, comp, real estate, assets (nominal USD, fam size adj)
WLTH_REAL_ASS_RD	FU's wealth, comp, real estate, assets (real USD 2023)
WLTH_REAL_ASS_RDF	FU's wealth, comp, real estate, assets (real USD 2023, fam size adj)
WLTH_REAL_DEB_ND	FU's wealth, comp, real estate, debts (nominal USD)
WLTH_REAL_DEB_NDF	FU's wealth, comp, real estate, debts (nominal USD, fam size adj)
WLTH_REAL_DEB_RD	FU's wealth, comp, real estate, debts (real USD 2023)
WLTH_REAL_DEB_RDF	FU's wealth, comp, real estate, debts (real USD 2023, fam size adj)
WLTH_FBUS_NET_ND	FU's wealth, comp, farm/business, net val (nominal USD)
WLTH_FBUS_NET_NDF	FU's wealth, comp, farm/business, net val (nominal USD, fam size adj)
WLTH_FBUS_NET_RD	FU's wealth, comp, farm/business, net val (real USD 2023)
WLTH_FBUS_NET_RDF	FU's wealth, comp, farm/business, net val (real USD 2023, fam size adj)
WLTH_FBUS_ASS_ND	FU's wealth, comp, farm/business, assets (nominal USD)
WLTH_FBUS_ASS_NDF	FU's wealth, comp, farm/business, assets (nominal USD, fam size adj)
WLTH_FBUS_ASS_RD	FU's wealth, comp, farm/business, assets (real USD 2023)
WLTH_FBUS_ASS_RDF	FU's wealth, comp, farm/business, assets (real USD 2023, fam size adj)
WLTH_FBUS_DEB_ND	FU's wealth, comp, farm/business, debts (nominal USD)
WLTH_FBUS_DEB_NDF	FU's wealth, comp, farm/business, debts (nominal USD, fam size adj)
WLTH_FBUS_DEB_RD	FU's wealth, comp, farm/business, debts (real USD 2023)
WLTH_FBUS_DEB_RDF	FU's wealth, comp, farm/business, debts (real USD 2023, fam size adj)
WLTH_SAVI_NET_ND	FU's wealth, comp, savings, net val (nominal USD)
WLTH_SAVI_NET_NDF	FU's wealth, comp, savings, net val (nominal USD, fam size adj)
WLTH_SAVI_NET_RD	FU's wealth, comp, savings, net val (real USD 2023)
WLTH_SAVI_NET_RDF	FU's wealth, comp, savings, net val (real USD 2023, fam size adj)
WLTH_SAVI_BNK_ND	FU's wealth, comp, savings, cash/checking (nominal USD)
WLTH_SAVI_BNK_NDF	FU's wealth, comp, savings, cash/checking (nominal USD, fam size adj)
WLTH_SAVI_BNK_RD	FU's wealth, comp, savings, cash/checking (real USD 2023)
WLTH_SAVI_BNK_RDF	FU's wealth, comp, savings, cash/checking (real USD 2023, fam size adj)
WLTH_SAVI_BND_ND	FU's wealth, comp, savings, bonds/CDs (nominal USD)
WLTH_SAVI_BND_NDF	FU's wealth, comp, savings, bonds/CDs (nominal USD, fam size adj)
WLTH_SAVI_BND_RD	FU's wealth, comp, savings, bonds/CDs (real USD 2023)
WLTH_SAVI_BND_RDF	FU's wealth, comp, savings, bonds/CDs (real USD 2023, fam size adj)
WLTH_INVE_NET_ND	FU's wealth, comp, investments, net val (nominal USD)
WLTH_INVE_NET_NDF	FU's wealth, comp, investments, net val (nominal USD, fam size adj)
WLTH_INVE_NET_RD	FU's wealth, comp, investments, net val (real USD 2023)
WLTH_INVE_NET_RDF	FU's wealth, comp, investments, net val (real USD 2023, fam size adj)
WLTH_INVE_IRA_ND	FU's wealth, comp, investments, IRA/annuity (nominal USD)
WLTH_INVE_IRA_NDF	FU's wealth, comp, investments, IRA/annuity (nominal USD, fam size adj)
WLTH_INVE_IRA_RD	FU's wealth, comp, investments, IRA/annuity (real USD 2023)
WLTH_INVE_IRA_RDF	FU's wealth, comp, investments, IRA/annuity (real USD 2023, fam size adj)
WLTH_INVE_STK_ND	FU's wealth, comp, investments, stocks (nominal USD)
WLTH_INVE_STK_NDF	FU's wealth, comp, investments, stocks (nominal USD, fam size adj)
WLTH_INVE_STK_RD	FU's wealth, comp, investments, stocks (real USD 2023)
WLTH_INVE_STK_RDF	FU's wealth, comp, investments, stocks (real USD 2023, fam size adj)
WLTH_VEHI_NET_ND	FU's wealth, comp, vehicles, net val (nominal USD)
WLTH_VEHI_NET_NDF	FU's wealth, comp, vehicles, net val (nominal USD, fam size adj)
WLTH_VEHI_NET_RD	FU's wealth, comp, vehicles, net val (real USD 2023)
WLTH_VEHI_NET_RDF	FU's wealth, comp, vehicles, net val (real USD 2023, fam size adj)
WLTH_OASS_NET_ND	FU's wealth, comp, other assets, net val (nominal USD)

WLTH_OASS_NET_NDF	FU's wealth, comp, other assets, net val (nominal USD, fam size adj)
WLTH_OASS_NET_RD	FU's wealth, comp, other assets, net val (real USD 2023)
WLTH_OASS_NET_RDF	FU's wealth, comp, other assets, net val (real USD 2023, fam size adj)
WLTH_ODEB_NET_ND	FU's wealth, comp, other debts, net val (nominal USD)
WLTH_ODEB_NET_NDF	FU's wealth, comp, other debts, net val (nominal USD, fam size adj)
WLTH_ODEB_NET_RD	FU's wealth, comp, other debts, net val (real USD 2023)
WLTH_ODEB_NET_RDF	FU's wealth, comp, other debts, net val (real USD 2023, fam size adj)
WLTH_ODEB_CRE_ND	FU's wealth, comp, other debts, cred cards (nominal USD)
WLTH_ODEB_CRE_NDF	FU's wealth, comp, other debts, cred cards (nominal USD, fam size adj)
WLTH_ODEB_CRE_RD	FU's wealth, comp, other debts, cred cards (real USD 2023)
WLTH_ODEB_CRE_RDF	FU's wealth, comp, other debts, cred cards (real USD 2023, fam size adj)
WLTH_ODEB_FAM_ND	FU's wealth, comp, other debts, fam loans (nominal USD)
WLTH_ODEB_FAM_NDF	FU's wealth, comp, other debts, fam loans (nominal USD, fam size adj)
WLTH_ODEB_FAM_RD	FU's wealth, comp, other debts, fam loans (real USD 2023)
WLTH_ODEB_FAM_RDF	FU's wealth, comp, other debts, fam loans (real USD 2023, fam size adj)
WLTH_ODEB_LEG_ND	FU's wealth, comp, other debts, legal bills (nominal USD)
WLTH_ODEB_LEG_NDF	FU's wealth, comp, other debts, legal bills (nominal USD, fam size adj)
WLTH_ODEB_LEG_RD	FU's wealth, comp, other debts, legal bills (real USD 2023)
WLTH_ODEB_LEG_RDF	FU's wealth, comp, other debts, legal bills (real USD 2023, fam size adj)
WLTH_ODEB_MED_ND	FU's wealth, comp, other debts, med bills (nominal USD)
WLTH_ODEB_MED_NDF	FU's wealth, comp, other debts, med bills (nominal USD, fam size adj)
WLTH_ODEB_MED_RD	FU's wealth, comp, other debts, med bills (real USD 2023)
WLTH_ODEB_MED_RDF	FU's wealth, comp, other debts, med bills (real USD 2023, fam size adj)
WLTH_ODEB_STU_ND	FU's wealth, comp, other debts, educ loans (nominal USD)
WLTH_ODEB_STU_NDF	FU's wealth, comp, other debts, educ loans (nominal USD, fam size adj)
WLTH_ODEB_STU_RD	FU's wealth, comp, other debts, educ loans (real USD 2023)
WLTH_ODEB_STU_RDF	FU's wealth, comp, other debts, educ loans (real USD 2023, fam size adj)
WLTH_ODEB_REM_ND	FU's wealth, comp, other debts, remain val (nominal USD)
WLTH_ODEB_REM_NDF	FU's wealth, comp, other debts, remain val (nominal USD, fam size adj)
WLTH_ODEB_REM_RD	FU's wealth, comp, other debts, remain val (real USD 2023)
WLTH_ODEB_REM_RDF	FU's wealth, comp, other debts, remain val (real USD 2023, fam size adj)

8.6 Relationship Identifier Variables

(A substantive overview of the Relationship Identifiers can be found on p. 48.)

8.6.1 Parent records

REL_PAR_TOT	Ind's total number of parent records
REL_PAR_BF_ID	Ind's parent, birth father, unique ID
REL_PAR_BM_ID	Ind's parent, birth mother, unique ID
REL_PAR_AF1_ID	Ind's parent, adoptive father 1, unique ID
REL_PAR_AF2_ID	Ind's parent, adoptive father 2, unique ID
REL_PAR_AM1_ID	Ind's parent, adoptive mother 1, unique ID
REL_PAR_AM2_ID	Ind's parent, adoptive mother 2, unique ID

8.6.2 Child records

REL_CHI_TOT	Ind's total number of child records
REL_CHI_REP	Ind's reported number of children, with or without records
REL_CHI1_ID	Ind's child 1, unique ID
REL_CHI1_TYPE	Ind's child 1, type of record
REL_CHI1_BYEAR	Ind's child 1, birth year

REL_CHI2_ID	Ind's child 2, unique ID
REL_CHI2_TYPE	Ind's child 2, type of record
REL_CHI2_BYEAR	Ind's child 2, birth year
REL_CHI3_ID	Ind's child 3, unique ID
REL_CHI3_TYPE	Ind's child 3, type of record
REL_CHI3_BYEAR	Ind's child 3, birth year
REL_CHI4_ID	Ind's child 4, unique ID
REL_CHI4_TYPE	Ind's child 4, type of record
REL_CHI4_BYEAR	Ind's child 4, birth year
REL_CHI5_ID	Ind's child 5, unique ID
REL_CHI5_TYPE	Ind's child 5, type of record
REL_CHI5_BYEAR	Ind's child 5, birth year
REL_CHI6_ID	Ind's child 6, unique ID
REL_CHI6_TYPE	Ind's child 6, type of record
REL_CHI6_BYEAR	Ind's child 6, birth year
REL_CHI7_ID	Ind's child 7, unique ID
REL_CHI7_TYPE	Ind's child 7, type of record
REL_CHI7_BYEAR	Ind's child 7, birth year
REL_CHI8_ID	Ind's child 8, unique ID
REL_CHI8_TYPE	Ind's child 8, type of record
REL_CHI8_BYEAR	Ind's child 8, birth year
REL_CHI9_ID	Ind's child 9, unique ID
REL_CHI9_TYPE	Ind's child 9, type of record
REL_CHI9_BYEAR	Ind's child 9, birth year
REL_CHI10_ID	Ind's child 10, unique ID
REL_CHI10_TYPE	Ind's child 10, type of record
REL_CHI10_BYEAR	Ind's child 10, birth year
REL_CHI11_ID	Ind's child 11, unique ID
REL_CHI11_TYPE	Ind's child 11, type of record
REL_CHI11_BYEAR	Ind's child 11, birth year
REL_CHI12_ID	Ind's child 12, unique ID
REL_CHI12_TYPE	Ind's child 12, type of record
REL_CHI12_BYEAR	Ind's child 12, birth year
REL_CHI13_ID	Ind's child 13, unique ID
REL_CHI13_TYPE	Ind's child 13, type of record
REL_CHI13_BYEAR	Ind's child 13, birth year
REL_CHI14_ID	Ind's child 14, unique ID
REL_CHI14_TYPE	Ind's child 14, type of record
REL_CHI14_BYEAR	Ind's child 14, birth year
REL_CHI15_ID	Ind's child 15, unique ID
REL_CHI15_TYPE	Ind's child 15, type of record
REL_CHI15_BYEAR	Ind's child 15, birth year
REL_CHI16_ID	Ind's child 16, unique ID
REL_CHI16_TYPE	Ind's child 16, type of record
REL_CHI16_BYEAR	Ind's child 16, birth year
REL_CHI17_ID	Ind's child 17, unique ID
REL_CHI17_TYPE	Ind's child 17, type of record
REL_CHI17_BYEAR	Ind's child 17, birth year
REL_CHI18_ID	Ind's child 18, unique ID
REL_CHI18_TYPE	Ind's child 18, type of record
REL_CHI18_BYEAR	Ind's child 18, birth year
REL_CHI19_ID	Ind's child 19, unique ID
REL_CHI19_TYPE	Ind's child 19, type of record

REL_CHI19_BYEAR	Ind's child 19, birth year
REL_CHI20_ID	Ind's child 20, unique ID
REL_CHI20_TYPE	Ind's child 20, type of record
REL_CHI20_BYEAR	Ind's child 20, birth year

8.6.3 Marriage records

REL_MAR_TOT	Ind's total number of marriage records
REL_MAR_REP	Ind's reported number of marriages, with or without records
REL_MAR1_ID	Ind's marriage 1, unique ID
REL_MAR1_MYEAR	Ind's marriage 1, marriage year
REL_MAR1_SYEAR	Ind's marriage 1, separation year
REL_MAR1_DYEAR	Ind's marriage 1, dissolution year
REL_MAR2_ID	Ind's marriage 2, unique ID
REL_MAR2_MYEAR	Ind's marriage 2, marriage year
REL_MAR2_SYEAR	Ind's marriage 2, separation year
REL_MAR2_DYEAR	Ind's marriage 2, dissolution year
REL_MAR3_ID	Ind's marriage 3, unique ID
REL_MAR3_MYEAR	Ind's marriage 3, marriage year
REL_MAR3_SYEAR	Ind's marriage 3, separation year
REL_MAR3_DYEAR	Ind's marriage 3, dissolution year
REL_MAR4_ID	Ind's marriage 4, unique ID
REL_MAR4_MYEAR	Ind's marriage 4, marriage year
REL_MAR4_SYEAR	Ind's marriage 4, separation year
REL_MAR4_DYEAR	Ind's marriage 4, dissolution year
REL_MAR5_ID	Ind's marriage 5, unique ID
REL_MAR5_MYEAR	Ind's marriage 5, marriage year
REL_MAR5_SYEAR	Ind's marriage 5, separation year
REL_MAR5_DYEAR	Ind's marriage 5, dissolution year
REL_MAR6_ID	Ind's marriage 6, unique ID
REL_MAR6_MYEAR	Ind's marriage 6, marriage year
REL_MAR6_SYEAR	Ind's marriage 6, separation year
REL_MAR6_DYEAR	Ind's marriage 6, dissolution year
REL_MAR7_ID	Ind's marriage 7, unique ID
REL_MAR7_MYEAR	Ind's marriage 7, marriage year
REL_MAR7_SYEAR	Ind's marriage 7, separation year
REL_MAR7_DYEAR	Ind's marriage 7, dissolution year
REL_MAR8_ID	Ind's marriage 8, unique ID
REL_MAR8_MYEAR	Ind's marriage 8, marriage year
REL_MAR8_SYEAR	Ind's marriage 8, separation year
REL_MAR8_DYEAR	Ind's marriage 8, dissolution year

8.7 Data Identifier Variables

(A substantive overview of the Data Identifiers can be found on p. 51.)

8.7.1 PSID-SHELF

PSID_RETRIEVE	Retrieval date of PSID Main Study, for generating PSID-SHELF
PSIDSHELF_COMPILE	Compile date of PSID-SHELF, current data file
PSIDSHELF_RELEASE	Release number of PSID-SHELF, current data file

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Generating the Data

PSID-SHELF was generated from more than 80,000 lines of code, across 93 files, using Stata-17/MP.

- The resulting data file contains 84,121 observations and 7,525 variables (when the data are in wide format: one row per person) or 3,533,082 observations and 593 variables (when the data are in long format: one row per person-year).

PSID-SHELF has two data files that are available for download. Each data file was uploaded as a compressed (zipped) folder (`.ZIP`), which can be extracted (unzipped) to yield a complete Stata dataset (`.DTA`).

- The compressed data files are 204 MB (wide format) and 307 MB (long format).
- The extracted data files are 2.36 GB (wide format) and 7.84 GB (long format).

The construction files that were used to generate PSID-SHELF are provided alongside the data files and the documentation. All files are available on Open ICPSR.

How to Contact Us

Please contact us if you have any comments or questions about PSID-SHELF.

Despite multiple code reviews, it is possible that the files used to produce PSID-SHELF contain errors. As such, we encourage users to review the code carefully. If identified, please report any mistakes or errors to us (psidshelf.help@umich.edu). The authors wish to underscore that PSID-SHELF is currently being shared as a data product, in beta, and users are responsible for any errors arising from the provided code and files.

For all other questions about the PSID Main Study (i.e., unrelated to PSID-SHELF), please contact the PSID help desk (psidhelp@umich.edu) or consult the PSID Main Study's official documentation.

Please Cite PSID-SHELF

Please cite PSID-SHELF in any product that makes use of the data or documentation.

Anyone who uses PSID-SHELF should cite the data or the *PSID-SHELF User Guide and Codebook*—and, as required by the PSID user agreement, the PSID Main Study.

Our recommended citations are listed below.

PSID-SHELF Data

Pfeffer, Fabian T., Davis Daumler, and Esther Friedman. *PSID-SHELF, 1968–2021: The PSID's Social, Health, and Economic Longitudinal File (PSID-SHELF), Beta Release.* Ann Arbor, MI: Inter-university Consortium for Political and Social Research [distributor], **<date last modified>**. DOI:10.3886/E194322.

PSID-SHELF User Guide and Codebook

Daumler, Davis, Esther Friedman, and Fabian T. Pfeffer. 2025. *PSID-SHELF User Guide and Codebook, 1968–2021, Beta Release.* PSID-SHELF Data Documentation 2025-01. Ann Arbor, MI: Survey Research Center, Institute for Social Research, University of Michigan. DOI:10.7302/25205.

The PSID Main Study Data

Panel Study of Income Dynamics, public-use dataset **<or "restricted-use data," if appropriate>**. Produced and distributed by the Survey Research Center, Institute for Social Research, University of Michigan, Ann Arbor, MI: **<year of data retrieval>**.