Prior to CY 2005

Prior to CY 2005, **MonthlyUnearnedIncome** was computed as the sum of the following variables evenly allocated across all months of the year:

* SocialSecurityOrRrr
* GovernmentPensions
* PrivatePensions
* VeteransPayments
* OtherRegularContributions
* DetailedOtherIncome (excluding black lung benefits and state temporary disability)

Plus the following variables allocated by the factor “ByAlimonyAndChildSupport:[[1]](#footnote-1)”

* Alimony
* ChildSupport

**DetailedOtherIncome** was computed as the sum of the following variables evenly allocated across all months of the year:

* LastWorkersCompensation (if LastWorkersCompensationSource = “Own insurance”)
* LastPrimaryDisability (if LastPrimaryDisabilitySource = “Accident or disability insurance”)
* LastSecondaryDisability (if LastSecondaryDisabilitySource = “Accident or disability insurance”)
* LastTotalEducationalAssistance
* LastOtherIncome (if LastOtherSource = Disability payments or anything else

CY 2005 – CY 2017

Beginning with CY 2005, **MonthlyUnearnedIncome** is the sum of the following income variables allocated evenly across months of the year:

* SocialSecurityOrRrr
* GovernmentPensions
* PrivatePensions
* VeteransPayments
* OtherRegularContributions

Plus the following variables allocated by the factor “ByAlimonyAndChildSupport:1”

* Alimony
* ChildSupport

Plus the following income components of **DetailedOtherIncome** that are allocated by the factor “ByWeeksNotWorked:”

* LastOwnWorkersCompIns
* LastOwnDisabilityIns
* LastStateTempDisability

Plus the following components of **DetailedOtherIncome** that are allocated evenly across all months of the year:

* LastTotalEducationalAssistance
* LastBlackLungMinerBen
* LastAnyOtherIncome

**DetailedOtherIncome** is the sum of:

* LastOwnWorkersCompIns
* LastOwnDisabilityIns
* LastStateTempDisability
* LastTotalEducationalAssistance
* LastBlackLungMinerBen
* LastAnyOtherIncome

**DetailedOtherIncome Components:**

**LastOwnWorkersCompIns** = LastWorkers Compensation (if LastWorkersCompensationSource = “Own insurance”

**LastOwnDisabilityIns** is the sum of:

* LastPrimaryDisability (if LastPrimaryDisabilitySource = “Accident or disability insurance”)
* LastSecondaryDisability (if LastSecondaryDisabilitySource = “Accident or disability insurance”
* LastOtherIncome (if LastOtherSource = “Disability payments from own insurance”

**LastStateTempDisability** is the sum of:

* LastPrimaryDisability (if LastPrimaryDisabilitySource = “State temporary sickness”
* LastSecondaryDisability (if LastSecondaryDisabilitySource = “State temporary sickness”

**LastTotalEducationalAssistance** is read directly from the CPS ASEC data and is the ASEC variable ED-VAL

**LastBlackLungMinerBen** is the sum of:

* LastPrimarySurvivorIncome (if LastPrimarySurvivorSource = “Black Lung survivor pension”
* LastSecondarySurvivorIncome (if LastSecondarySurvivorSource = “Black Lung survivor pension”
* LastPrimaryDisability (if LastPrimaryDisabilitySource = “Black Lung miner's disability”
* LastSecondaryDisability (if LastSecondaryDisabilitySource = “Black Lung miner's disability”

**LastAnyOtherIncome =** LastOtherIncome (if LastOtherSource = “Anything else”)

Beginning with CY 2018

Beginning with CY 2018, **MonthlyUnearnedIncome** is the sum of the following income variables allocated evenly across months of the year:

* SocialSecurityOrRrr
* GovernmentPensions
* PrivatePensions
* VeteransPayments
* EmploymentDisabilityIncome
* EmploymentSurvivorIncome
* RetirementDistributions
* RetirementAnnuity
* OtherRegularContributions

Plus the following variable allocated by the factor “ByAlimonyAndChildSupport:1”

* Alimony

Plus the following income components of **DetailedOtherIncome** that are allocated by the factor “ByWeeksNotWorked:”

* LastOwnWorkersCompIns
* LastOwnDisabilityIns
* LastStateTempDisability

Plus the following components of **DetailedOtherIncome** that are allocated evenly across all months of the year:

* LastTotalEducationalAssistance
* LastBlackLungMinerBen
* LastAnyOtherIncome
* LastAnnuityOrLifeInsurance

**EmploymentDisabilityIncome** is the sum of:

* LastPrimaryDisability (if LastPrimaryDisabilitySource = “Company or union disability”, “Federal, state, or local government employee disability”, or “US military retirement disability”)
* LastSecondaryDisability (if LastSecondaryDisabilitySource = “Company or union disability”, “Federal, state, or local government employee disability”, or “US military retirement disability”)

**EmploymentSurvivorIncome** is the sum of:

* LastPrimarySurvivorIncome (if LastPrimarySurvivorSource = “Company or union survivor pension”, “Federal, state, or local government survivor pension”, or “US military retirement survivor pension”)
* LastSecondarySurvivorIncome (if LastSecondarySurvivorSource = “Company or union survivor pension”, “Federal, state, or local government survivor pension”, or “US military retirement survivor pension”)

**RetirementDistributions** is the sum of:

* LastRetirementDistribution1 (sum of ASEC variables DST\_VAL\_YNG1 + DST\_VAL1)
* LastRetirementDistribution2 (sum of ASEC variables DST\_VAL\_YNG2 + DST\_VAL2)

**RetirementDistributions** is read directly from the CPS ASEC data and is the ASEC variable ANN\_VAL

**DetailedOtherIncome Components:**

**LastOwnWorkersCompIns** = LastWorkers Compensation (if LastWorkersCompensationSource = “Own insurance”

**LastOwnDisabilityIns** is the sum of:

* LastPrimaryDisability (if LastPrimaryDisabilitySource = “Accident or disability insurance”)
* LastSecondaryDisability (if LastSecondaryDisabilitySource = “Accident or disability insurance”
* LastOtherIncome (if LastOtherSource = “Disability payments from own insurance”

**LastStateTempDisability** is the sum of:

* LastPrimaryDisability (if LastPrimaryDisabilitySource = “State temporary sickness”
* LastSecondaryDisability (if LastSecondaryDisabilitySource = “State temporary sickness”

**LastTotalEducationalAssistance** is read directly from the CPS ASEC data and is the ASEC variable ED-VAL

**LastBlackLungMinerBen** is the sum of:

* LastPrimarySurvivorIncome (if LastPrimarySurvivorSource = “Black Lung survivor pension”
* LastSecondarySurvivorIncome (if LastSecondarySurvivorSource = “Black Lung survivor pension”
* LastPrimaryDisability (if LastPrimaryDisabilitySource = “Black Lung miner's disability”
* LastSecondaryDisability (if LastSecondaryDisabilitySource = “Black Lung miner's disability”

**LastAnyOtherIncome** is the sum of:

* LastOtherIncome (if LastOtherSource = “Anything else”)
* LastPrimarySurvivorIncome (if LastPrimarySurvivorSource = “Don’t know”)
* LastSecondarySurvivorIncome (if LastSecondarySurvivorSource = “Don’t know”)
* LastPrimaryDisability (if LastPrimaryDisabilitySource = “Don’t know”)
* LastSecondaryDisability (if LastSecondaryDisabilitySource = “Don’t know”)

**LastAnnuityOrLifeInsurance** is the sum of:

* LastOtherIncome (if LastOtherSource = “Annuities or paid-up life insurance policies”)
* LastPrimarySurvivorIncome (if LastPrimarySurvivorSource = “Regular payments from annuities or paid-up life insurance policies”)
* LastSecondarySurvivorIncome (if LastSecondarySurvivorSource = “Regular payments from annuities or paid-up life insurance policies”)

**Changes in MonthlyAsset Components:**

**Interest** is the sum of:

* NonretirementInterest (ASEC variable TRDINT\_VAL)
* RetirementInterest
* LastOtherIncome (if LastOtherSource = “Interest”)

**RetirementInterest** is the sum of:

* LastRetirementInterest1 (ASEC variable RINT\_VAL1)
* LastRetirementInterest2 (ASEC variable RINT\_VAL2)

**Changes in MonthlyWorkersComp Components:**

**WorkersCompensation** is the sum of:

* LastWorkersCompensation (if LastWorkersCompensationSource = “State workmens compensation”, “Employer or employer’s insurance”, “Other”)
* LastPrimarySurvivorIncome (if LastPrimarySurvivorIncomeSource = “Workers compensation survivor”)
* LastSecondarySurvivorIncome (if LastSecondarySurvivorIncomeSource = “Workers compensation survivor”)
* LastPrimaryDisabilityIncome (if LastPrimaryDisabilityIncomeSource = “Workers compensation”)
* LastSecondaryDisabilityIncome (if LastSecondaryDisabilityIncomeSource = “Workers compensation”)
* LastOtherIncome (if LastOtherSource = “Workmens compensation”)

1. This factor is displayed in the TRIM3 interface as “by allocation.” [↑](#footnote-ref-1)