



## Data Collection Worksheet

**Please Note:** The Data Collection Worksheet (DCW) is a tool to aid integration of a PhenX protocol into a study. The PhenX DCW is not designed to be a data collection instrument. Investigators will need to decide the best way to collect data for the PhenX protocol in their study. Variables captured in the DCW, along with variable names and unique PhenX variable identifiers, are included in the PhenX Data Dictionary (DD) files.

To ask these questions, the interviewer needs to know the current poverty levels. Poverty levels are updated each year by the U.S. Census Bureau. The current poverty levels are used in the follow-up questions to determine the threshold levels to ask participants with low income, if the bracketing questions are asked.

The next questions are about your total family income in [last calendar year in 4-digit format] BEFORE TAXES. Income is important in analyzing the health information we collect. For example, with this information, we can learn whether persons in one income group use certain types of medical services more or less often than those in another group. Please be assured that, like all other information you have provided, these answers will be kept strictly confidential.

When answering these questions, please remember that by "combined family income," I mean your income PLUS the income of all family members living in this household (including cohabitating partners, and armed forces members living at home).

[All families]

1. When answering this next question, please remember to include your income PLUS the income of all family members living in this household.

What is your best estimate of the total income of all family members from all sources, before taxes, in the last calendar year?

Enter '999995' if the reported income is \$999,995 or greater.

000000-[  ] 999995 \_\_\_\_\_

999997 [  ] Refused

999998 [  ] Not Ascertained

999999 [  ] Don't Know

If income is 0-999 (unusually low) or 250001-999995 (unusually high), make corrections if necessary. Do not read to respondent.

If income = 1000-250000, end survey.

If income = Refused or Don't know, go to 2.

2. Was your total family income from all sources less than [250% of poverty threshold] or [250% of poverty threshold] or more?

1  Less than 250% of poverty threshold

2  250% of poverty threshold or more

7  Refused

9  Don't Know

If 2 = Less than 250% of poverty threshold or Refused or Don't Know, go to 2.a.

If 2 = 250% of poverty threshold or more and # household members = 1 or 2, go to 3.

If 2 = 250% of poverty threshold or more and # household members = 4 or greater than or equal to 7, go to 5.

If 2 = 250% of poverty threshold or more and # household members = 3, 5 or 6, go to 4.

If 2 = Refused or Don't Know, end survey.

2.a. Was your total family income from all sources less than 138% of poverty threshold or 138% of poverty threshold or more?

1 Less than 138% of poverty threshold

2 138% of poverty threshold or more

7 Refused

9 Don't Know

If 2.a. = Refused or Don't Know, end survey.

If 2.a. = Less than 138% of poverty threshold, go to 2.a.1.

If 2.a. = 138% of poverty threshold or more, go to 2.a.2.

2.a.1. [If 9.a. = Less than 138% of poverty threshold] Was your total family

income from all sources less than 100% of poverty threshold or 100% of poverty threshold or more?

1 Less than 100% of poverty threshold

2 100% of poverty threshold or more

7 Refused

9 Don't Know

End Survey after answering 2.1.a.

2.a.2. [If 9.a. = 138% of poverty threshold or more] Was your total family income from all sources less than 200% of poverty threshold or 200% of poverty threshold or more?

1 Less than 200% of poverty threshold

2 200% of poverty threshold or more

7 Refused

9 Don't Know

End Survey after answering 2.2.a.

3. Was your total family income from all sources less than \$75,000 or \$75,000 or more?

1  Less than \$75,000

2  \$75,000 or more

7  Refused

9  Don't Know

If 3 = Less than \$75,000, go to 5.

If 3 = \$75,000 or more, go to 4.

If 3 = Refused or Don't Know, end survey.

4. Was your total family income from all sources less than \$100,000 or \$100,000 or more?

1  Less than \$100,000

2  \$100,000 or more

7 [ ] Refused

9 [ ] Don't Know

If 4 = Less than \$100,000 and # household members = 1 or 2 or 5 or 6, end survey.

If 4 = Less than \$100,000 and # household members = 3, go to 5.

If 4 = \$100,000 or more and # household members = 1 or 2 or 3, go to 6.

If 4 = \$100,000 or more and # household members = 5 or 6, go to 5.

If 4 = Refused or Don't Know, end survey.

5. Was your total family income from all sources less than [400% of poverty threshold] or [400% of poverty threshold] or more?

1 [ ] Less than 400% of poverty threshold

2 [ ] 400% of poverty threshold or more

7 [ ] Refused

9 [ ] Don't Know

If 5 = Less than 400% of poverty threshold and # household members is greater than or equal to 8, go to 6.

If 5 = Less than 400% of poverty threshold and # household members is less than 8, end survey.

If 5 = 400% of poverty threshold or more and # household members = 1 or 2 or 3 or greater than or equal to 6, end survey.

If 5 = 400% of poverty threshold or more and # household members = 4 or 5, go to 6.

If 5 = Refused or Don't Know, end survey.

6. Was your total family income from all sources less than \$150,000 or \$150,000 or more?

1 [ ] Less than \$150,000

2 [ ] \$150,000 or more

7 [ ] Refused

9 [ ] Don't Know

Protocol source: <https://www.phenxtoolkit.org/protocols/view/11102>