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# UMD/AEI Poverty Tabulator —User’s Guide—

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# Installation Instructions

The following instructions describe how to install the UMD/AEI Poverty Tabulator to your computer. For the Tabulator to run on your computer, you must have Java installed.

**Step 1.** Install Java by going to [www.java.com](http://www.java.com) and clicking the “Free JAVA download” button. This will take you to another web page that will begin to automatically download Java on your computer. After installing Java, you must restart your computer. If you already have the latest version of Java, the website will not perform the download.

**Step 2.** There are two ways to install the UMD/AEI Poverty Tabulator to your computer: (1) Download from the internet. Go to <http://www.aeimirror.org/poverty/> and enter the username and password that have been provided. Right click on the file “PovToolSetup.exe” and select “Save Target As...” This will open up a dialog box to download the program. Select the c:\ folder as the designated folder for downloading and select “Save”. The download will take between twenty and thirty minutes, depending on the speed of your computer, or (2) Copy the file “PovToolSetup.exe” to the c:\ drive of your computer. Please note that the Tabulator will require approximately 6.23 GB of storage space.

**Step 3.** If you are downloading the Tabulator, after the download is complete, another dialog box will appear with the options “Run” or “Open folders”. Selecting “Run” will open the Poverty Analysis Tool Setup Wizard. After the wizard opens, select “Next”, “I accept” and then “Next”. The wizard will then ask where you want to save the file. Click “Next and then “Install”. Please do not change the location of where to save the file as this will cause problems with the installation. The installation may take between ten and twenty minutes. Click “Finish” to exit out of the wizard after installation is complete.

If you copied the Tabulator from a CD, simply double click on the file “PovToolSetup.exe” and follow the instructions for the Poverty Analysis Tool Setup Wizard as described above.

**Step 4.** To start the software, double click on the shortcut that has been installed on your desktop entitled “Poverty\_Analysis\_Tool.exe”. (The shortcut will have an icon that looks like a graph).

You will see an entry page titled “Poverty Measurement in America.” After reading the background materials on the right side of the screen, click the button labeled “Enter” at the bottom of the screen. You will be transferred to *Step A. Base Parameters*, and you are now ready to begin using the UMD/AEI Poverty Tabulator, as described below.

# Introduction

This is a general purpose user's guide for the UMD/AEI Poverty Tabulator (hereafter referred to as the tabulator). The tabulator is an outgrowth of a project of the University of Maryland's School of Public Policy, conducted in association with the American Enterprise Institute for Public Policy Research (AEI), the U.S. Census Bureau, the U.S. Department of Commerce, and the U.S. Department of Health and Human Services. The tabulator is based on discussions held at seven seminars on "Reconsidering the Federal Poverty Measure" from July 2004 to May 2005. The data used in the tabulator were derived from public use data based on the Census Bureau's March Current Population Survey (CPS) Annual Social and Economic Supplement (ASEC), and its precursor, the March CPS, for the years 1968 to 2006. Included in this user's guide is a description of the data sets used, step-by-step instructions on how to use the tabulator, and its resulting data products. The software for the tabulator and all of the data sets it uses are currently included on a CD designed to run from a desktop computer, but will be made available for download at a later date.

An overview of the tabulator is useful before describing its specific components in detail. The tabulator is divided into six separate sections, or steps, that are used in the order listed to generate statistical tables:

- Step A. Base Parameters
- Step B. Income Definitions
- Step C. Create Table Inputs
- Step D. Design Table
- Step E. Select Table Inputs
- Step F. View Table

The sections are listed as tabs at the top of each display page in the tabulator. To generate a statistical table, you select from a variety of options in each section by marking a check box, pressing a radio button, or indicating a desired value.

*Step A. Base Parameters* – you select a price adjustment series, poverty threshold alternatives, type of unit, geographic price adjustment, and data set reference years to be used for generating tables.

*Step B. Income Definitions* – you have the option of using one of the four standard definitions of income used by the Census Bureau, an expanded income definition based on the four standard definitions, or a user-defined income measure that allows the inclusion of specific types of money income and noncash benefits, the exclusion of taxes and various expenses incurred in earning income, and the adjustment of selected survey data for underreporting.

*Step C. Create Table Inputs* – you create an input file of microdata that will be used to generate statistical tables in a later stage. The input file is uniquely identified based on the options that were selected in Steps A and B.

*Step D. Design Table* – you define the dimensions of a desired table, indicating the unit of analysis (households, families, persons, or persons in families); the demographic, social, and economic variables that will be shown in the table; whether the variables should be shown separately or nested within each other; and a variety of statistics to be displayed, with an option to use the official poverty thresholds or some multiple of them.

*Step E. Select Table Inputs* – you select a desired table input file from among all that have been created in current and past sessions, and process the data to produce the desired statistical table. Options are available to manage table input files, including deleting and refreshing selections.

*Step F. View Table* – you view the statistical table that has been created, with an option to download the table into an Excel spreadsheet for additional calculations.

Each of the six steps are discussed in detail, with a description of the various options in the order that they are presented.

(Go to Step A)

## Step A. Base Parameters

This section enables you to set several base parameters that will be needed to create the data sets used for deriving estimates of poverty based on alternative definitions of income. These parameters enable you to use a price series for adjusting the poverty thresholds, select the poverty thresholds among two alternatives, designate the type of unit for analysis, decide whether to adjust the poverty thresholds for geographic differences in the costs of living, and select the year (or years) for which data will be created to generate the statistical tables. Accordingly, the following operations in Section A enable you to perform these functions:

- Price Adjustment Series
- Poverty Threshold Alternatives
- Type of Unit
- Geographic Price Adjustment
- Data Sets Reference Years

**Step A1. Price Adjustment Series.** Adjust the poverty thresholds for inflation using *one* of five possible series:

- CPI-U
- CPI-U-RS/X1 (from 1968)
- CPI-U-RS (from 1978)
- Chained CPI
- PCE Deflator

The *CPI-U* is the price series used to adjust the official poverty thresholds. It is based on a fixed market basket of goods and services to measure price changes.

The *CPI-U-RS/X1 (from 1968)* is an alternative research price series from the Bureau of Labor Statistics (BLS) that corrects for the improper measurement of housing since 1978, as well as other improvements, and extends the corrections back to 1968 with additional data from the BLS experimental series. It is based on a fixed market basket of goods and services to measure price changes.

The *CPI-U-RS (from 1978)* is an alternative research price series from the BLS that corrects for the improper measurement of housing since 1978, as well as other improvements. It is based on a fixed market basket of goods and services to measure price changes.

The *Chained CPI* is an alternative price series from the BLS based on a variable market basket of goods and services, which reflects how people alter their consumption patterns to avoid the

burden of inflation. The series is available on the BLS website from 2000 to the present, but has been extended back to 1990 based on supplemental experimental data obtained from the BLS, and grafted on to the CPI-U-RS/X1 series for earlier years back to 1968.

The *PCE Deflator* is the implicit price deflator from the Bureau of Economic Analysis, and is based on a variable market basket of goods and services, which reflects how people alter their consumption patterns to avoid the burden of inflation.

The default option is the *CPI-U*.

**Step A2. Poverty Threshold Alternatives.** Select the poverty thresholds using *one* of two available options:

- Use Standard (Official) Poverty Threshold Matrix
- Use 3-Parameter Poverty Thresholds

*Use standard (official) poverty threshold matrix* is the series used by the Census Bureau to produce the official estimates of poverty each year, and was developed by Mollie Orshansky of the Social Security Administration. The official poverty thresholds are basically set at three times the cost of a nutritionally adequate food plan for families of different sizes, as determined in the 1960s, and are updated annually to adjust for inflation using the CPI-U.

*Use 3-parameter poverty thresholds* uses the poverty thresholds developed by David Betson of Notre Dame University, which includes parameters to adjust for the number and relationship of adults in the family, the number of children, and a scale factor to account for economies of scale. The three-parameter poverty thresholds are generally regarded as having a more accurate representation of economies of scale compared to the official poverty thresholds. Use of the three-parameter poverty thresholds has very little effect on measured poverty overall, but can make a significant difference for some population subgroups, such as the elderly.

The default option is *use standard (official) poverty threshold matrix*.

**Step A3. Type of Unit.** Specify whether poverty status will be determined using either family income or household income. You must select *one* of two available options:

- Compute Poverty Using Family Units (Official Definition)
- Compute Poverty Using Household Units

*Compute poverty using family units (official definition)* includes the income of all family members when determining poverty status. A family consists of people living in a housing unit who are related by blood, marriage, or adoption. Poverty status for unrelated individuals is determined by comparing their income against the poverty thresholds for one person, which vary

by whether the person is under 65 years old or 65 years old and over.

*Compute poverty using household units* determines poverty status based on the income of everyone living in the household. A household consists of all of the members in a housing unit, whether they are related or not. Therefore, household income includes the income of unrelated persons such as romantically engaged partners (cohabitators), roommates, and persons sharing rent (coresidents). Poverty status for unrelated individuals is determined by combining their income with the incomes of everyone else in the household in which they are living, regardless of relationship.

The default option is *compute poverty using family units (official definition)*.

**Step A4. Geographic Price Adjustment.** Select whether or not to use a geographical price adjustment to account for differences in the cost of living between states. You must select *one* of two available options:

- No Adjustment for Geographic Differences in Prices
- Apply Geographic Price Adjustments

*No adjustment for geographic differences in prices* uses the official poverty matrix, which does not vary by state. Accordingly, the same poverty threshold is used in California, Mississippi, or any other state, to determine poverty status.

*Apply geographic price adjustments* adjusts the poverty thresholds for differences in the cost of living across states, as developed from the variation in Fair Market Rents (FMRs) across states using data supplied by the Department of Housing and Urban Development (HUD). Use of geographic price adjustments results in higher poverty estimates for states that have a relatively high cost of living (such as California), and lower poverty estimates for states with a relatively low cost of living (such as Mississippi), but has very little effect on the overall estimate of poverty.

The default option is *no adjustment for geographic differences in prices*.

**Step A5. Data Sets Reference Years.** Select the year (or years) desired for analysis in the creation of statistical tables. The tabulator allows you to select either one year of data to be processed at a time, or as many years as desired. The data available consist of a time series from 1968 to 2006.

The default option is that no years are selected, so you must select at least one year in order to generate a statistical table.

**Note:** Users should be advised that although the tabulator includes the latest data for income year



2006 from the Census Bureau, these data are based on money income only and do not include the effect of accounting for taxes, noncash benefits, and other adjustments that the Bureau makes to the data. We will incorporate these additional data into the tabulator as soon as the Census Bureau makes them available, although we do not currently have a date for when this will happen. In the meantime, users should be advised that the data for 2006 will not be consistent with earlier years if options are selected for taxes and noncash benefits because no data on these subjects are currently available.

(After you finish with Step A, go to Step B)

## Step B. Income Definitions

This section gives you the option to select the definition of income to measure poverty status for *one* of three available options, which are designated in tabs:

- B1. Base Census Definitions
- B2. Expanded Census Definitions
- B3. User Defined Income Measure

Although these three options are referred to as steps, in effect you will be choosing only *one*, as described below.

**Step B1. Base Census Definitions.** You can select *one* of four available options for the standard definitions of income now being used by the Census Bureau, but you do not need to select any if you do not wish to use these definitions:

- Definition 1. Money Income (official Census income measure)
- Definition 2. Market Income
- Definition 3. Post Social Insurance Income
- Definition 4. Disposable Income

*Definition 1. Money income (official Census income measure)* includes all cash income received by persons fifteen years old and over, before deductions for taxes and other expenses. Money income does not include realized capital gains or lump sum payments disbursed from insurance companies, workers' compensation, or pension plans.

*Definition 2. Market income* includes money income less non-means-tested cash transfers (such as Social Security, unemployment compensation, workers' compensation, some veterans' payments, and survivor, pension, and disability benefits) and less means-tested cash transfers (such as Supplemental Security Income (SSI), public assistance including Temporary Assistance for Needy Families (TANF), and means-tested veterans' payments). Market income includes imputed net realized capital gains, imputed rental income (also called the return on home equity), less imputed work expenses other than child care.

*Definition 3. Post social insurance income* includes money income, imputed net realized capital gains, and imputed rental income, less imputed work expenses other than child care and less government means-tested cash transfers (such as Supplemental Security Income (SSI), public assistance including Temporary Assistance for Needy Families (TANF), and means-tested veterans' payments). Post social insurance income differs from market income in that it includes government non-means-tested benefits, most notably Social Security.

*Definition 4. Disposable income* includes money income, imputed net realized capital gains, imputed rental income, and noncash transfers (such as food stamps, public or subsidized housing, and free or reduced-priced school lunches), less imputed work expenses other than child care, federal and state income taxes, federal payroll taxes, and property taxes for owner-occupied homes.

Use of these definitions enables you to create an historical time series of data using a consistent definition of income.

The default is that no option is selected, so you must select *one*, and only one, definition if you wish to use these definitions. Note that by pressing the *Clear* button, you can clear your choices.

**Step B2. Expanded Census Definitions.** You can select *one* among thirteen possible definitions of income that are sub-components of the four major definitions of income described above, but you do not need to select any if you do not wish to use the definitions. Note that to use this category, there must be no box checked in section *Step B1. Base Census Definitions*, and only one among the following definitions may be selected:

- Definition 1. Money income excluding net realized capital gains (official Census definition)
- Definition 1a. Money income plus net realized capital gains
- Definition 1b. Definition 1a plus imputed net return on home equity
- Definition 1c. Definition 1b less work related expenses (exc child care)
- Definition 2. Definition 1c less all government cash transfers
- Definition 3. Definition 2 plus nonmeans-tested cash transfers
- Definition 3a. Definition 3 plus means-tested cash transfers
- Definition 3b. Definition 3a plus noncash, nonmedical government transfers that can be valued
- Definition 3c. Definition 3b plus Federal Earned Income Credit
- Definition 3d. Definition 3 less taxes after credits except Federal EIC
- Definition 3e. Definition 3d plus Federal EIC
- Definition 3f. Definition 3e plus means-tested cash transfers
- Definition 4. Definition 3f plus noncash, nonmedical government transfers that can be valued

These definitions are self-explanatory.

The default is that no option is selected, so you must select *one*, and only one, definition to be used. Note that by pressing the *Clear* button, you can clear your choices.

**Step B3. User Defined Income Measure.** You can create a custom-made definition of income that includes selected components of cash income and noncash benefits, and deducts selected

taxes and expenditures incurred at work. You can also correct the data for underreporting of selected income sources in the CPS. Separate tabs are shown for each of the operations.

**Step B3.1 Start Here – User Defined Income Definition.** Select *one* of the two options from *Income Definition Start Options*:

- Start with money income components
- Build income definition from scratch

*Start with money income components* will highlight the various components of cash income that are included in the definition of income used to measure official poverty, as shown in *Step B3.2 Cash Income Sources*. From this starting point, you can either include or exclude specific types of income.

*Build income definition from scratch* shows no income sources highlighted in the following sections, enabling you to select the various components desired.

Note that this tab also has a *Reset and Clear* function with two options:

- Reset to Money Income
- Clear Income Selections

*Reset to money income* erases prior selections and resets them to the components included in money income.

*Clear income selections* erases all prior income selections and returns them to the default option, which is that no specific types of income are highlighted.

**Step B3.2 Cash Income Sources.** Select various components of money income to be included in your definition from among the following major categories:

- Market Cash Income
- Nonmeans-tested Government Cash Benefits
- Means-tested Government Cash Benefits
- Contributions from Outside the Household
- Other Income
- Educational Assistance

*Market cash income* includes total earnings, wages and salary, self-employment income, property income (interest, dividends, rent, estates, trusts, royalties, etc.), retirement pensions and annuities, survivor pensions and annuities, disability pensions and annuities and self-directed disability benefits, and net realized capital gains (losses). As many of these components as

desired can be selected in the definition of income used to measure poverty. (Note: Because total earnings includes wages and salary and self-employment income, if total earnings is selected both of its components are automatically included, and you cannot also select wages and salary and self-employment income. However, if you remove the check mark from total earnings, you can select either wages and salary or self-employment income, or both.)

*Nonmeans-tested government cash benefits* includes Social Security and Railroad Retirement, unemployment compensation, workers' compensation, and veterans' payments other than pensions. As many of these components as desired can be selected in the definition of income used to measure poverty.

*Means-tested government cash benefits* includes TANF/AFDC/ADC only, other cash public assistance only, both TANF/AFDC/ADC and other cash public assistance, Supplemental Security Income, veterans' pensions, and Federal Earned Income Credit. As many of these components as desired can be selected in the definition of income used to measure poverty.

*Contributions from outside the household* includes child support, alimony, and contributions from persons outside the household. As many of these components as desired can be selected in the definition of income used to measure poverty.

*Other income* includes other cash income not elsewhere classified, and eventually will include child care benefits (not currently operational).

*Educational assistance* includes educational assistance from government sources only and grants, scholarships, etc., from the school only. As many of these components as desired can be selected in the definition of income used to measure poverty.

The default is that none of these income sources is highlighted, unless you have selected *start with money income components*.

**Step B3.3 Noncash Benefits.** Select various components of noncash benefits to be included in your definition from among the following major categories:

- Market Noncash Income
- Means-tested Government Noncash Benefits
- Medicare and Medicaid Medical Benefits

*Market noncash income* includes employer contributions for health insurance and net imputed rent for owner-occupied housing. As many of these components as desired can be selected in the definition of income used to measure poverty. Employer contributions for pension plans will eventually be included (not currently operational).

*Means-tested government noncash benefits* includes food stamps, school lunches, low-income energy assistance and public housing subsidy. As many of these components as desired can be selected in the definition of income used to measure poverty. School breakfasts and WIC (Women, Infants, and Children Benefits) will eventually be included (not currently operational.)

*Medicare and Medicaid medical benefits* includes the fungible value of Medicare, the market value of Medicare, the fungible value of Medicaid, and the market value of Medicaid. The market value represents the full insurance value of the medical benefit for different risk classes, whereas the fungible value is limited to the amount of the medical benefit implied by the official poverty thresholds. (Note: both Medicare and Medicare may be selected, but you must choose between selecting either the fungible value or market value for each; both the fungible value and the market value cannot be included.)

The default is that none of these types of noncash benefits is highlighted.

**Step B3.4 Taxes.** Select the various types of taxes to be deducted from income in your definition. (You may select any or all.)

- Federal individual income taxes
- State individual income taxes
- Mandatory payroll taxes (FICA, etc.)
- Property taxes (homeowners)

These four types of taxes are self-explanatory.

The default is that none of these types of taxes is highlighted.

**Step B3.5 Expenditures Deducted from Income.** Select the various types of expenditures to be deducted from income in your definition. (You may select any or all.)

- Medical out-of-pocket expenses (MOOP)
- Work-related child care expenses
- Work-related transportation and other expenses

*Medical out-of-pocket expenses (MOOP)* includes any expenses made in obtaining medical care, such as the payment of insurance premiums, purchase of prescriptions, or payment of other medical costs.

*Work-related child care expenses* includes any payments made for child care, beyond any subsidies received, for the purpose of going to work (not currently operational). These expenses are not included in Census Bureau tabulations of work-related expenses for determining poverty status, and, as such, they are not currently shown on public use data sets issued by the Census

Bureau.

*Work-related transportation and other expenses* includes all costs except child care for going to work, such as the cost of transportation or commuting, payment of union dues, purchase of uniforms for work, and so forth. These expenses are included in Census Bureau tabulations of work-related expenses for determining poverty status, and, as such, they are shown on public use data sets issued by the Census Bureau.

The default is that none of these types of expenditures deducted from income is highlighted.

**Step B3.6 Adjustments for Underreporting.** Select adjustments for underreporting of means-tested benefits collected in the CPS. You can make four different adjustments to means-tested benefits, based on data from the TRIM model at the Urban Institute:

- TRIM modeled TANF/AFDC/ADC
- TRIM modeled Supplemental Security Income
- TRIM modeled food stamps
- TRIM modeled public housing subsidy

Additional details about the methodology used for making adjustments in the TRIM model can be obtained from the Urban Institute.

Note that if you elect to use the TRIM modeled values for these benefits, the values originally selected will be deducted so program benefits will not be duplicated.

Adjustments for underreporting using the TRIM modeled data are currently available only for 1997 through 2004. Therefore, you should not check the TRIM modeled data option for any years outside of this range. If you do, the tabulator as currently configured will deduct the originally reported values and you will not have a TRIM modeled value to replace it, thus resulting in an understatement of income to determine poverty status. We plan to modify the tabulator to make it impossible to select a TRIM modeled adjustment outside this range of years, but, in the meantime, users must take care not to make this mistake.

There is an additional complication for the TRIM modeled data for 2004. As of this writing, the Urban Institute has only provided 2004 TRIM modeled data only for the two means-tested cash benefits: TANF/AFDC/ADC and Supplemental Security Income. It has not provided 2004 TRIM modeled data for the two means-tested noncash benefits: food stamps and public housing subsidies. Therefore, users who wish to use TRIM modeled data for 2004 should only check the two means-tested cash benefits and not the two means-tested noncash benefits; otherwise, there will be a shortfall in income for the reason discussed above. As soon as we obtain the TRIM modeled data for the two means-tested noncash benefits from the Urban Institute, we will include them in the tabulator, and there will no longer be a complication with the 2004 data.

(After you finish with Step B, go to Step C)



## Step C. Create Table Inputs

This section creates a microdata file from the CPS data that will be used in subsequent sections to generate statistical tables. The tabulator is designed to run one year of data at a time, or several years concurrently, if desired.

Now that all of the options for creating the table input file have been selected, only a few additional steps are needed.

First note that the long white box in the section titled *Current Input File Specifications* shows the options that have been selected for the price adjustment, poverty matrix, poverty unit, and geographic adjustment

To create an input file, highlight the year in the box labeled *Selected Data Sets*, and press the *Add>>* button to move the year over to the box labeled *Queued for Processing*. The year can easily be removed by pressing the *<<Remove* button.

Now press the button labeled *Create Table Input(s)* in the middle of the page.

Depending upon the speed of your computer, it may take some time to pass the microdata file to create the input file. A window will appear labeled *Processing, please wait . . .* When the window disappears, the input file has been created, and you are now ready to move to the next section.

(After you finish with Step C, go to Step D)

## Step D. Design Table

In this section, you design the structure of the table that will contain the data that have been created in the table input file. The tasks in this section include specifying the variables in the table, selecting the unit of analysis, designating specific statistics to be shown, and deciding whether to show the data by the 100 percent of the poverty line or a specified multiple.

Accordingly, the following operations are contained in Section D:

- Variables Layout
- Analysis Unit
- Operations
- Variable Selection
- Statistics
- Multiples of Poverty

**Step D1. Variables Layout.** Select *one* of two options that determine how variables will be displayed in the table:

- Tabulate Separately
- Nest Variable Choices

*Tabulate separately* causes the variables to be shown sequentially in the stub of the table, without cross-classification between them. Using this option, you can tabulate up to twenty-five variables at a time.

*Nest variable choices* causes the variables to be shown sequentially in the stub of the table, but with cross-classification (nesting) between them. Using this option, you can tabulate up to three variables at a time.

**Step D2. Analysis Unit.** Select the unit of analysis for producing the table, by selecting *one* of four options:

- Persons by Family
- Families
- Persons by Household
- Households

*Persons by family* produces the table for the universe of persons, and their poverty status will be determined based on their family income, as in the official definition of poverty.

*Families* produces the table for the universe of families, and their poverty status will be determined based on their family income, as in the official definition of poverty.

*Persons by household* produces the table for the universe of persons, and their poverty status will be determined based on their household income, whether or not the members of the household are related.

*Households* produces the table for the universe of households, and their poverty status will be determined based on their household income, whether or not the members of the household are related.

*Addendum:* It is possible to produce a table for *persons in families* by clicking the command *options* at the top left of the display page for the tabulator, and marking the check box that reads *Add Unit Variables to the Person List*. In order to activate the variables list for this option, you must first click *Families* and then *Persons by Family*. (Note: It is important to uncheck this box when additional tables are being produced for groups other than persons in families.)

**Step D3. Operations.** Press the button labeled *View Variable Details* to see all of the variables that are used in the tabulator, as well as the specific subcategories for each variable. Once the button is pressed, a screen will appear that reads *Variables Names and Labels*. You must then specify a given year within the box that reads *Select Year*. This is necessary because the available variables vary by year, depending upon what data the Census Bureau has collected for that year. Once the year has been specified, all of the available variables are displayed for all of the universes. You can use the scroll key on the right to see the full list of variables and their subcategories. When finished, you should press the button labeled *Close Window*.

**Step D4. Variable Selection.** Select up to twenty-five variables that will be displayed in the stub of the table if you selected *Tabulate separately* in *Step D1. Variables Layout* (discussed above), or up to three variables if you selected *Nest variable choices*. It should be noted that the variables displayed depend upon whether the universe of persons, families, or households has been selected in the *Step D2. Analysis Unit* (discussed above). In addition, as mentioned above, the available variables vary by year.

The variables that are available for a table of *Persons by Family* or *Persons by Household* include:

- Age of Person (1) [summary age categories]
- Age of Person (2) [detailed age categories]
- Child Single Years of Age
- Division of Residence
- Gender of Person
- Hispanic Origin of Person

- Marital Status of Person
- Birth and Citizenship of Person
- Educational Attainment of Person
- Family Relationship of Person
- Household Relationship of Person
- Work Experience of Person
- Race and Hispanic Origin of Person
- Race of Person
- Region of Residence
- State of Residence

The variables that are available for a table of *Families* include:

- Age of Family Reference Person (1) [summary age categories]
- Age of Family Reference Person (2) [detailed age categories]
- Birth and Citizenship of Family Reference Person
- Division of Residence
- Educational Attainment of Family Reference Person
- Gender of Family Reference Person
- Hispanic Origin of Family Reference Person
- Marital Status of Family Reference Person
- Number of Children Under 18 in Family
- Number of Earners in Family
- Race and Hispanic Origin of Family Reference Person
- Race of Family Reference Person
- Region of Residence
- Size of Family
- State of Residence
- Type of Family
- Work Experience of Family Reference Person

The variables that are available for a table of *Households* include:

- Age of Householder (1) [summary age categories]
- Age of Householder (2) [detailed age categories]
- Division of Residence
- Gender of Householder
- Hispanic Origin of Householder
- Birth and Citizenship of Householder
- Educational Attainment of Householder
- Marital Status of Householder
- Number of Earners in Household

- Number of Related Children Under 18 in Household
- Race and Hispanic Origin of Householder
- Race of Householder
- Region of Residence
- Size of Household
- State of Residence
- Type of Household
- Work Experience of Householder

To select up to twenty-five variables to be displayed, highlight the variable of interest and press the *Add>>* button to move the variable into the box labeled *Your Choices*. You can easily remove a variable by pressing the *<<Remove* button. As noted above, the variables will be displayed in the table in the order in which they have been selected.

**Step D5. Statistics.** Select from a variety of statistics that will be displayed in the boxhead of the table. The available choices include:

- Total Population Count
- Number in Poverty
- Poverty Rate
- Mean Poverty Gap
- Aggregate Poverty Gap
- Average Weighted Threshold
- Mean Unit Size

*Total population count* is the total number of persons, families, or households in the universe from which poverty status is determined. For persons, unrelated individuals under 15 years old are excluded from the poverty universe. For families, unrelated subfamilies are excluded from the poverty universe.

*Number in poverty* is the number of persons, families, or households that are designated in poverty based upon the various criteria that have selected.

*Poverty rate* is the percentage of persons, families, or households that are designated as in poverty, derived by dividing the number in poverty by the total population count.

*Mean poverty gap* is the average amount of money that would be required to raise every person, family, or household designated as in poverty up to the poverty line.

*Aggregate poverty gap* is the total amount of money that would be required to raise every family or household designated as in poverty up to the poverty line. (The statistic is not available for persons.)

*Average weighted threshold* is the average poverty threshold for units in the various categories (variables) that have been selected for display in the table.

*Mean unit size* is the average family or household size for units in the various categories (variables) that have been selected for display in the table. (The statistic is not available for persons.)

Note that if you have selected *Families* or *Households*, you can display all of the statistics listed above. However, if you have selected *Persons by Family* or *Persons by Household*, you will not be able to display statistics on *Aggregate poverty gap* and *Mean unit size*.

The statistics will be displayed in the boxhead of the table in the order listed above.

**Step D6. Multiples of Poverty.** Select the multiple of poverty by which the data will be tabulated by clicking the appropriate category:

- 50 Percent
- 100 Percent
- 125 Percent
- 130 Percent
- 150 Percent
- 185 Percent
- 200 Percent

Note that there is a white rectangular box at the bottom right of the display that allows you to enter a multiple of poverty other than one of the pre-selected categories (e.g., 140 for 140 Percent). Enter the desired multiple without the word *Percent*.

(After you finish with Step D, go to Step E)

## Step E. Select Table Inputs

This section enables you to load selected input files and create a table that has been specified in the previous section. This section is divided into three categories:

- Operations
- Table Inputs Selection
- Table Input File Details

These categories are referred to as steps, although there are options available within each category, as described below.

**Step E1. Operations.** This category enables you to perform four different operations:

- Load Table Inputs
- Process Table Request
- Delete Table Input Files
- Refresh Selections

*Load table inputs* loads any of the table input files that have been created either in the current session or in past sessions. (Note: When the button is pressed, the tabulator will load only the universes (persons, families, or households) that agree with the universe selected in section *Step D. Design Table*. To load other table input files, the universe in section D should be changed accordingly.) Once the button is pressed, a list of all available table input files will appear in *Step E2. Table Inputs Selection*, denoted by a unique identifier in the form of a lengthy number.

*Process table request* (red button) generates a table that has been specified for a designated table input file. This button should not be pressed until a table input file has been selected in *Step E2. Table Inputs Selection* described below.

*Delete table input files* deletes table input files that have been created either in the current or previous sessions. When this button is pressed, a separate window labeled *Delete File* will appear, from which you can highlight the files to be deleted. The selected files will be deleted by pressing the button labeled *Delete File*, or the operation can be canceled by pressing the button labeled *Cancel*.

*Refresh selections* re-lists the current inventory of table input files after the operation of *delete table input files* has been performed.

**Step E2. Table Inputs Selection.** Select a given table input file from which to generate a table.

To select a specific table input file, highlight the file from the list of *Existing Table Input Files*. By pressing the button labeled *Add>>*, the selected file will be moved over into the box labeled *Queued for Inclusion in Next Table*. The file can be removed by pressing the button labeled *<<Remove*.

**Step E3. Table Input File Details.** This category enables you to see the details about the various table input files. When these files are listed under *Existing Table Input Files*, they have a unique identifier in the form of a lengthy number that makes it difficult to know the contents of the file. By double-clicking a highlighted table input file in *Existing Table Input Files*, all of the various criteria used in creating the table input file will be displayed in *Step E3. Table Input File Details*. This important information enables you to ensure that the appropriate table input file has been selected for creating a table.

**To Create a Table:** Once the appropriate table input file has been added, you can create the table by pressing the red button labeled *Process Table Request*. When the button is pressed, a window labeled *Processing Table Request* will appear with a progress bar. When the progress bar is fully extended, the table is ready to be viewed. If no variables were selected, or no statistics were specified, in *Step D. Design Table*, a window will appear with an error message denoting the problem. You can then return to *Step D*, correct the problem, and then return to *Step E* to continue processing the table.

As noted above in *Step E1. Operations*, you can delete table input files by pressing the button *Delete table input files* and see that the operation has been performed by pressing the button *Refresh selections*.

(After you finish with Step E, go to Step F)



## Step F. View Table

This section enables you to display the table that has been created, and export the table to an Excel spreadsheet for additional calculations. By pressing button labeled *Show New Table* in the *Actions* category at the bottom of the screen, the newly created table is displayed in the top panel of this section. Note that if you do not press the button labeled *Show New Table*, then the table previously generated will still be displayed.

**Step F1. Table Legend.** The middle panel of this section, labeled *Table Legend (included in Excel insert)*, shows all of the specifications used in creating the table, for current and future reference.

**Step F2. Actions.** In the *Actions* category, there is also a button labeled *Insert into Excel*, which enables you to insert the table into an Excel spreadsheet for additional data manipulations. When this button is pressed, a window appears with the title *Excel Output Properties*. This window contains four operations:

- Select Directory
- Specify Excel Output File Name (existing files overwritten)
- Specify Sheet Name
- Specify Excel Output Template (optional)
- Notes on Transferring Data to Excel

*Select directory* provides a default directory to save the table as an Excel spreadsheet, and contains the option to change the directory using a *Browse* button.

*Specify Excel output file name (existing files overwritten)* provides a default output file name for the Excel spreadsheet, and contains an option to change the file name using a *Browse* button, with the warning that existing files will be overwritten.

*Specify sheet name* enables you to select unique names for the sheets in the Excel spreadsheet.

*Specify Excel output template (optional)* enables you to create an optional template for the Excel spreadsheet.

After completing these categories, you presses the button labeled *OK* to accept them, or *Cancel* to terminate the operation.

If you press the button labeled *OK*, your new Excel file will be created, and you will be able to find it by going into the folder `c:\UMSPPPovTool`, clicking the folder *runtime*, and clicking the

folder *excel*.

*Notes on transferring data to Excel* contains the following message for users:

The Excel output file must not be open when the transfer is made. Default Excel file name is the system assigned table name based on request parameters.

(End)