Catalogue No. 94-12

1994 SLID INCOME INTERVIEW: OBSERVATION AND DEBRIEFING REPORT

September 1994

Élaine Fournier, Household Surveys Division

Helen Smith, Survey Operations Division

The SLID Research Paper Series is intended to document detailed studies and important decisions for the Survey of Labour and Income Dynamics. These research papers are available in English and French. To obtain a summary description of available documents or to obtain a copy of any, please contact Philip Giles, Manager, SLID Research Paper Series, by mail at 11-D8 Jean Talon Building, Statistics Canada, Ottawa, Ontario, CANADA K1A 0T6, by INTERNET (GILES@STATCAN.CA), by telephone (613) 951-2891, or by fax (613) 951-3253.

EXECUTIVE SUMMARY

The first annual SLID income interview was conducted in May 1994. This report is a composite of two documents, presented as Parts A and B.

- Part A contains general observations of the collection operation as reported by members of the SLID head office project team who observed the data collection;
- Part B contains a summary of responses by a subset of interviewers who were asked to complete a debriefing questionnaire after completing SLID collection.

An in-depth knowledge of the survey is required to a good understanding of this document.

TABLE OF CONTENTS

INTRODUCTION

In May 1994, SLID gathered data on income. The information was gathered using the computer-assisted interviewing method. Most interviews were conducted by telephone. The questions asked during this data collection process concerned income sources. The persons included in the sample had been provided in advance with the list of questions that they would be asked. The respondents could thus consult the necessary documents in order to prepare in advance for the income interview. The questions and collection procedures for the May 1994 interview are described in detail in **Questionnaire and Collection Procedures for SLID Income Data Collection - May 1994**, publication No 94-08 of the SLID Research Paper Series.

This report, which is a composite of various documents, is divided into two separate parts:

- Part A contains the general observations of members of the SLID and SCF head office team who observed the data collection and/or tracing.

- Part B contains a summary of the responses of interviewers who were asked to complete a debriefing questionnaire after the survey.

PART A: OBSERVATIONS OF HEAD OFFICE

1. INTRODUCTION

In this document we have combined the contents of several reports describing interviews conducted in the framework of the "income" part of SLID. Members of the SLID and SCF team observed interviews at the Montreal, Toronto, Halifax and Edmonton regional offices and in the Ottawa region. Some observers observed tracers.

The observers appreciated the opportunity that they had to see how the interviews and tracing were carried out. Some of the comments that follow were made by several observers, while others were made by only one.

2. GENERAL OBSERVATIONS

In general, the interviewers appear to be comfortable using the computer. They like computer-assisted interviews, since once the interview is completed, they do not have to revise and correct the information on the questionnaires. One observer mentioned that even though there were waiting times, the interview went well.

Relations with head office are good; the employees of the Toronto Regional Office and head office are continually in contact. By contrast, there appear to be communication problems between the Montreal Regional Office and Ottawa. Among other things, it is important for someone working at the help desk at head office to be able to speak French. More emphasis should be placed on the communication and problem-solving process, and tools should be developed to assist regional office personnel to respond more effectively to problems that arise.

Because of the number of supplementary surveys, some observers mentioned that the interviewers seemed tired. Some interviewers mentioned that they would prefer to conduct the SLID interview in June, since in May they had just finished the SCF and were less motivated. Because of their lack of motivation, some interviewers did not take the time to complete a practice case before the start of the interviews, and this caused delays in the interviews, since these persons did not realize that they had problems with the transmission of the application until the collection period had started.

One comment was made by interviewers and tracers alike: it is necessary to have more spaces in which to enter more notes, whether in case management or in the tracing unit.

2.1 CASE MANAGEMENT

- Some interviewers complained of the waiting time between the contact part and the income part, while others considered it satisfactory. When respondents are slow to respond or the household is a large one, interviewers often complete the interviews on paper and then enter the information. The waiting time between each of the members of the household for completing the income interview is also relatively long. One observer mentioned that these waiting times could be reduced by treating income as a single questionnaire for the household. The time between selecting a case and reaching the first question is relatively long, especially if no one answers the telephone. Some interviewers believed that the waiting times were longer in May than in the February interview.

- Since waiting times are relatively long, the record of calls is not really reliable, since interviewers do not always select the cases before telephoning. If someone answers the telephone, they select the case and while waiting to reach the first question, they make small talk. Tracers sometimes select cases to familiarize themselves with them and do not actually make calls.

APPLICATION

- The interviewers appreciate being able to make temporary notes and appointments and put the cases in order, and they make frequent use of the F1 option to look at the codes.
- Would it be possible to directly transfer the cases from PMs' computers to RO-UNIX without having to assign final status codes?
- The application should be changed to accept dates of birth prior to 1900. It should also be changed to allow for an appointment to be made directly by choosing the Appointment code (077). Some interviewers mentioned that it is hard to see the information on the demographic screen because of the highlighting.
- The F9 function can only be used to transfer cases between telephone folders and personal folders.

CODES

- The interviewers would like to have a code for answering machines. Some interviewers said that they would use this code to indicate that it was possible for them to leave a message on the answering machine, while for others, this would mean that they had actually left a message on the machine. Some would like a code for ill or deceased. One observer believes that there should be space to make a comment when the "non-interview due to unusual circumstances" code is selected.

SUGGESTIONS

- A number of interviewers would like the telephone number to be available at all times and easily updatable (possibly by using F11). They would also like to have the names of household members on the COMP1 screen. The introduction to the survey should also be available at all times, so that in the case of a partially completed interview, the interviewer knows how to explain the survey.
- One interviewer would like to have the name of the last contact. Another mentioned that he would like to be able to update the best time to call. Some interviewers would like to have demographic information on all members of the household on the same screen. One interviewer suggested that the Appointment column be moved so that the telephone number could be seen without having to use the arrow keys on the CMSLID1 screen.

2.2 THE CONTACT PART

- Some interviewers would like to have the names of household members on the CON_Q2 screen and on the appointment list, they would like to have the name of the respondent.
- Interviewers have trouble understanding question CON_Q4 and some do not read question CON_Q11. Question CON_Q17 seems to be pointless.
- The interviewers would like to have the list of household members in the contact part.
- In the case of a longitudinal person who moves in with a new, non-longitudinal household, some questions should be changed so as to be able to take account of the fact that it is not the cohabitants who are moving in with the longitudinal person, but the reverse.
- Interviewers and tracers would like to be able to enter a new address. In May, some respondents knew that they would be moving in July and

wanted to give their new address. It was hard for the interviewers to make a note of it. Specific instructions should be given for when this happens.

2.3 THE INCOME INTERVIEW

- Some respondents are very reluctant. They have already answered the Labour Force Survey and feel that they have done their part. Some interviewers believe that if the sample were changed, this would result in respondents being more co-operative. In Nova Scotia, refusals were more frequent than expected, with respondents expressing reluctance about things coming from the government.
- Interviewers often use paper to make notes, write down a telephone number and calculate. Since the application is not very fast, interviewers use paper to write down the responses of persons who are slow to answer, and they enter the data in the computer afterward.

REFUSALS

- For income, there will always be people who will refuse to complete the interview. Senior interviewers mentioned that a number of elderly persons are unwilling to give out information on their income because family members have told them not to answer. Other respondents have a problem with giving out information on someone else's income. These considerations should be taken into account for SLID, which year after year asks the same respondents to do the income interview.

- In fact, persons who categorically refused to do the February interview should be removed from the sample, since they have a bad image of the survey. For this purpose, interviewers should always make notes specifying whether or not the refusal is a hard one. One observer commented that SLID refusals were harder to overcome than for the other surveys.
- Senior interviewers and PMs should be able to access interviewers' refusal notes, so as to help them convert refusals. Some refusals are "hidden," in the sense that the interviewer managed to obtain the income sources but not the amounts, with the result that the interview is coded as having been completed, whereas the information obtained is not complete.
- Some interviewers reported that they were less convincing for SLID than for the SCF because for that survey, they would lose only the answers to a few months of the LFS, whereas for SLID they would lose a lot of information.

APPLICATION

- The interviewers really like the income application, especially since it is easy to go from one question to another without changing screens too often. They also like the error messages that remind respondents that during the labour interview they indicated that they had worked or received transfer payments. Most interviewers pay attention to the messages, try to resolve them and manage to do so. However, one interviewer felt that there were too many messages.

- Some interviewers told observers that they would like to be able to alter a respondent's questionnaire after the interview was completed. Since the interview is relatively short, it sometimes happens that respondents provide the information for the wrong person or else remember an income source when the interview for that person is over. Interviewers find it frustrating that they know that they have made errors but that it is impossible for them to correct them. They enter information in temporary notes.
- One observer believes that the interviewers should be informed of the problems associated with the application. For example, they should have known that in some cases, they had to press F12 twice in order to get out of the income application or press Enter twice.

TOTAL INCOME

- The interviewers would like to have total income calculated on the screen without having to bring up a message that gives total income. In fact, some interviewers keyed in a fictitious amount in order to make that message appear. They then checked with the respondent to make sure that the total income figure was correct.
- Interviewers had difficulty with persons who had received no income. Some interviewers typed $1 so that they could get out of the income screen. Others suggest that there should be a "no income" category so as not to have to enter $0 for total income.

OPTIONS

- The options (F3) were not used very much, because interviewers found that they did not have enough information about how to use them. On the other hand, when interviewers knew how to use the calculator, they found it very useful, especially for calculating old age security, social assistance and the GST credit. More exercises focussing on the calculator feature should be prepared for the next collection.
- The "calculation of weeks" option was appreciated.
- The help function (F1) was not used very much by some, but the interviewers like to know that it is available on the screen. Since the interviewers finished the SCF a few weeks earlier, they were already relatively familiar with the concepts of the survey. They frequently referred to the SLID and SCF manuals to find out where to enter the figures collected.
- One interviewer mentioned that he would like to have the option of typing a line number in order to move on the two screens of the questionnaire. During the 3B test, several errors crept in because of this option. It should not be available.
- The interviewers should have more information in the manuals telling them how to use the functions. One observer indicated that the interviewer could not access the list of members once he had got out of the case management demographic information. This option is available in the income questionnaire.
- The interviewers would like to have all the comments together or else have a summary page for making notes.

CONCEPTS

- Observers mentioned that some concepts, such as investment income, were not well understood, and that there was confusion between the Quebec Pension Plan and old age security.
- For some items, such as old age security and the guaranteed income supplement, interviewers know the amounts and ask respondents if they are actually receiving this amount. The interviewers thus enter a specific amount even if the respondent does not know that amount. The amount refers to the amount received as of the date of the interview and not really the amount received the previous year. The specific figures collected for these questions should not be relied on for the purpose of determining whether the respondent completed the questionnaire.
- The concept of income tax paid during the reference year is poorly understood by respondents. It appears, however, that interviewers have a good understanding of it.
- One interviewer had difficulty explaining the concept of net farm self-employment income to the respondent. The respondent had a negative net income and did not know where to look on his tax return.

QUESTIONNAIRE

- Some respondents believed that the interviewer was telephoning from Revenue Canada itself with a coloured questionnaire. Few respondents had completed the questionnaire before the interview. One interviewer mentioned that 25% of respondents had completed it, another said that one-third of respondents had completed it, and two observers stated that few respondents had taken the time to complete the questionnaire. Some interviewers specified that they had the impression that questionnaires were more often filled out by SCF respondents because the interviewers asked them, in the month preceding the SCF, to fill out the questionnaire. At the Edmonton Regional Office, interviewers asked respondents to fill out their questionnaire if they had not already done so, and when they called back, the questionnaires were filled out.

- Respondents were often willing to check their tax return to assist them in completing the interview. Interviewers did not really read the items from the screen but took the questionnaire and asked questions in blocks. One observer mentioned that the sources most often asked were wages and salaries, self-employment, interest, dividends, family allowances, old age security, Canada/Quebec Pension Plan, unemployment insurance, GST credit, provincial tax credit, RRSP, total income and income tax. He added that the interviewers observed had not mentioned capital gains, veteran's pensions, alimony, money received from persons living outside the household and other monetary income.
- Some respondents were quite willing to complete the interview and consulted their tax return which had been prepared by H&R Block or someone else and had considerable difficulty finding the corresponding amounts. Income figures reported are very often approximate.

QUESTIONNAIRES RETURNED BY MAIL

- Some respondents preferred to mail back their completed questionnaire, either because they did not have a private telephone line or because they did not want the interviewer to see the information. The questionnaire was then given to the interviewer who had that case and he or she entered the information. In this way, the interviewer nevertheless had access to the information. Procedures should be established so that regional offices will know what to do in these situations.
- The regional offices should have more information on what to do with questionnaires that are returned by the post office. In some cases, the information on the envelope may be useful for the survey (deceased, moved, wrong address, wrong postal code). Thought should be given as to the procedure to adopt.

QUESTIONS REGARDING THE INCOME QUESTIONNAIRE

- Some interviewers stated that they would like to be able to add the name of a person to the question, "Interviewer: Select person you are talking to" (INC_Q1) as in the LFS.
- Some interviewers always answered YES to the question asking whether the questionnaire was available and complete (INC_Q2) because they thought that they could not complete the interview if they answered NO. This question requires more explanation.
- Some interviewers did not read the following question (INC_Q3): "Please go through the questionnaire and read the line number and the amounts entered."
- To question INC_Q5, which asked for permission to obtain the data directly from Revenue Canada, interviewers often needed to give more explanations. One observer stated that respondents wanted to answer this question only for themselves. He added that interviewers would probably be very persuasive in order to avoid completing the income interview in May.
- Some interviewers would like to be able to recopy the information from the contact person rather than ask for this same information from each household member. In some cases (unrelated persons), it is useful to have the name of a different contact person for each member of the household, but in other cases (economic family with adolescents), it is not necessary to have different names. In any event, in most cases the respondent names the same contact person.
- One interviewer had trouble getting out of the END_INC_Q3 screen. He entered a comment and was then able to get out by pressing "Enter".

2.4 TRACING

- In general, tracing went well. However, in some provinces, it was harder to trace respondents because some residents had no telephone. Those who had not been traced in February were not traced in May either.
- It appears that the manual contained enough information on tracing. However, some interviewers were unfamiliar with some of the features of the program. Some tracers also mentioned that the interviewers did not have enough training. Interviewers are in the best position to do tracing in their region. In several cases the interviewers had not tried the basics before sending the case to tracing. In other cases, interviewers referred cases of refusal to tracing with codes "no one home after many calls" (034) and "unable to trace" (035). When the tracers contacted the respondents, the latter were very hostile.
- The notes provided by interviewers are often incomplete, and it is hard for the tracers to determine what the interviewer did to try to trace the respondents. It was suggested that a half-day of training be allocated to tracing. This could be a planned exercise during which interviewers would do tracing exercises and could telephone the senior interviewer to ask questions.
- Most tracers feel that any information gathered during the preceding cycle should be transferred. It often happened that "dead end" entries in February helped to find respondents in May. Tracers would like interviewers to indicate why the source was a dead end. They also mentioned that they should have the option of deleting unnecessary information gathered in earlier cycles or adding information on a source. Only one tracer who was observed mentioned that he would like to have only relevant information.

- It was proposed that the term "dead end" be changed and that tracers be allowed to enter another result after having entered that one. Very often, tracers go back over the interviewers' steps and are able to trace the respondent. They would like to be able to update the tracing notes.
- One interviewer mentioned that the original LFS interviewers should follow the SLID respondents because they are more familiar with the situation than the new interviewer. It was also proposed that interviewers be present at the regional office to interview the respondents traced. This way the tracers could focus exclusively on tracing.
- Some tracers believe that the time allowed for tracing is sufficient, while others feel that more time should be allocated to this activity. One observer mentioned that tracers should have non-collection time in which they could check out other sources (city hall, social services, etc). At the same time, there should not be two contacts with respondents.
- Tracers should have a task, but it should be reduced. However, the task should be sufficiently large that tracers have enough work before cases are transferred to them. In this way, the tracers can familiarize themselves with the application and can do tracing at times that are less suitable for interviews. However, one interviewer said that tracers should have only one task (including regular cases), because otherwise, whom would he send his "unable to trace" cases to (himself, or the senior interviewer)?
- Technical personnel in the regional offices should have a better understanding of the income application. The tracers try to explain their problems, and technical staff do not know how to solve them.

- After their cut-off date, interviewers should send their "no one home after many calls" (035) cases to tracers so that they can try to communicate with these persons. Tracers believe that this would be more productive than continuing with the cases which they already have, and which are usually coded "dead end" by that point.

SOURCES AND RESULTS

- There should be more details in the manual on the OTHER result. The manual should state that this result should be used when more information is desired on a source already entered, and an arrow should be added to indicate that there are more sources available. Some tracers also suggested that ANSWERING MACHINE be a separate result. It would be easier for the tracer to know who is calling back when a message has been left on an answering machine. Another result could be added, namely NO SERVICE AT THIS NUMBER.
- On the list of sources, the previous household should be added and the city hall should be deleted. An arrow should also be added to indicate that there are more sources available. Statistics Canada should obtain permission to obtain new addresses for members of the Armed Forces who are transferred. However, one observer mentioned that unofficial contacts, such as post office employees in small municipalities, often give out information, even though this is against the policies of Canada Post.

- Tracers would very much like to have a summary of all the steps that have been taken, so as to have a full picture and assist them in continuing the tracing. This complete summary could appear at the bottom of the View and Select Cases screen (CMSLID1) in the trace folder. Tracers would like to have more information on the person to be traced, such as the original telephone number and the most recent telephone number, the complete former address and the names of the members of the original household.
- One tracer took many notes on paper in order to remind himself of what he had done. He even kept notes from January to assist him in his searches in May. The manuals should perhaps mention that because of confidentiality requirements, notes should be made on the computer only.
- To prevent the use of paper when the tracer communicates with directory assistance, it should be possible to choose Add Information (F2) only once and enter a series of telephone numbers. This would also prevent the selection of useless information, since instead of entering all the telephone numbers, tracers would eliminate those that are not useful.
- The Toronto Regional Office uses INFODIRECT, a tool that can be used to search a telephone number, address or postal code for Ontario or Quebec. This is very useful for tracing and should be used in the other regional offices, especially the one in Montreal.
- Tracers mentioned several problems. In some cases in the trace folder, there is no indication of either the city or the telephone numbers. This makes it hard for the tracer. It is also hard to trace a respondent when there the name is misspelled or the surname and the given name are reversed.

- The information provided in the trace folder is not necessarily relevant. For example, the listing address is not useful, whereas for some institutions, if the tracers had the respondent's name and date of birth, they could tell whether the person was still institutionalized.
- The contact questions should also be changed when a person has been traced.

INSTITUTIONALIZED PERSONS

- Some tracers believe that cases of institutionalized persons or persons living outside Canada should be put directly into the trace folder with a special code to identify them and instructions in the manual to remind the tracer to tell the contact person at the institution about SLID. Other tracers believe that these cases should be added to the interviewer's assignment with a special code to identify them. Other tracers feel that these persons should continue to be connected with the original household rather than putting them in a separate household. They add that the best tracing source is still the original household and not the contact person.
- It was suggested that no attempt be made to trace persons when it has just been learned that they are in an institution. On the other hand, it should be possible to identify persons who are less likely to be de-instutitionalized (elderly persons or prison inmates).
- Some tracers believe that respondents will not say that a member of their household is institutionalized. They will merely say that he or she is still a member of the household but is not available to be interviewed. Thus it is hard to identify institutionalized persons.

APPLICATION

- One tracer complained about the amount of time that it took when a person was traced and it was necessary to conduct the income interview.
- Tracers would like to know which cases have been transferred to them and who sent them the case to be traced. This would be useful if they have questions for the interviewer. They would also like to have the name and telephone number of the employer.
- The name of the contact person is not linked to the household member to whom it refers. There should be a flag to indicate which household member is associated with the contact person.
- Deceased persons should not be sent for tracing. The application should be corrected to take account of this.
- The options available to the interviewer are not necessarily available to the senior interviewer. For example, a traced person wanted to be interviewed in French, and the documentation was not available.
- On the CMINTRCE1 screen, tracers would like to have the name of the city or town and not just the street address.
- When a case was sent to tracing, the cursor moved several cases back, and the interviewer had to find the next case manually. The cursor should go to the next case.
- As a result of the transmission problems in February, some information on tracing was lost, and interviewers had to ask once again for information that they had already asked for in February. Respondents were annoyed about receiving income questionnaires for persons who had left the household prior to the labour interview.
- One observer mentioned that he was not sure that the "Tra Ent" column (for cases transferred to a tracer) on the "View Interviewers' Workload" screen was working properly. This should be checked.

- One observer suggested that the last telephone number (or the last address) be put as the first source in tracing, so that the interviewer can indicate whether he or she tried that source.
- One interviewer had trouble transferring a case from the trace folder to the telephone folder because the manual says "Enter Trace", whereas at the bottom of the screen, "Start Trace" was indicated. The same terms should be used.
- On the "Tracing Function for Interviewer" screen (CMINTTRCE1), when the list of result codes appears, it covers up the age and sex of the persons to be traced. This may be a problem for tracers, who do not know whom to address since they cannot distinguish between an adult and a child.

SPECIFIC POINTS

- Since the Halifax Regional Office is responsible for tracing for the province of Newfoundland, it might be useful to have three tracers for Halifax.
- In Prince Edward Island, a number of respondents have two residences. It was suggested that there be specific instructions during training to tell interviewers to keep the second address in the END CONTACT part rather than asking the name of a contact person. It was also suggested that the two addresses be noted along with the months during which the respondents reside at each, so as to know where to contact them in writing or by telephone. To economize, the residents of Prince Edward Island cut off telephone service at the farm, and in order to obtain the new telephone number it is easier to call directory assistance.
- In Edmonton, tracers take note of everything that they need to search in telephone directories. A single tracer then goes to the Regional Office and does research for the other tracers.

2.5 MANUALS AND TRAINING

- The manuals should have more instructions on how to enter a refusal code for the household. The manuals are not sufficiently clear on the difference between the refusal codes for the person and for the household, or on the distinction between a complete interview and a partial one.
- The manuals should also stress the fact that interviewers must press Enter after entering an amount in the income part in order not to make errors.
- Some interviewers mentioned that a copy of the tax return form should be supplied with the manuals.
- The workbook should be sent further in advance to enable interviewers to finish it before the collection period.
- Interviewers liked the idea of having modules for the manuals. This would enable new interviewers to obtain general information on the survey, while the other interviewers could concentrate on the new survey questions and the new features of the application.
- The manuals should stress the importance of entering a contact person even if the respondent maintains that he or she has no intention of moving. This would greatly improve tracing. It should also be stressed that it is important to indicate the regional code. Sometimes respondents have moved to another province and it is hard to find the code.
- In questions and answers, it should be clearly explained why cohabitants must also complete SLID. Interviewers have trouble explaining this to respondents.

- In the demographic part, interviewers did not have a good understanding of the purpose of the √'s and did not know that they were to gather information only for new cohabitants and those whose information had not been confirmed in January.
- One observer suggested that next year a group session be arranged for SLID and SCF interviewers to motivate them. Such sessions are necessary, not so much for training purposes, but rather for interviewers' morale.
- New interviewers for SLID have trouble completing interviews, and they have lower response rates. Since the manuals and workbooks were sent out late, these new interviewers had less time to familiarize themselves with the survey and the application.

2.6 OTHER OBSERVATIONS AND SUGGESTIONS

- Some interviewers prefer to work out of the regional office. During waiting times, they can discuss their problems. At home, it is hard to stay motivated, since there is considerable dead time between screens.
- Regional office personnel spend a lot of time solving transmission problems. During transmission, some senior interviewers must spend time next to the computers because they sometimes have to press Enter. These problems reduce the amount of time spent interviewing.
- Language problems are a source of difficulty for interviewers, who often have to enter information in notes because respondents misunderstand the questions and give answers at the wrong time.

- The kit sent to households should be addressed to the last contact. In some cases, the envelope was sent to a child, and this annoyed the respondents. In Newfoundland, the kits were clearly sent out late, since some respondents had just received theirs and had not had the time to fill out the questionnaire. Additional kits should be sent to tracers, so that they can send them to respondents who have not received theirs. This would improve relations with respondents.
- In Montreal, some directory assistance (411) operators charge for giving out a telephone number. Are there other ways of getting the information?
- Care should be taken to ensure that the contract person's surname and given name are given to the interviewer.
- A senior interviewer mentioned that he would like to have the following columns in the senior interviewer's report: total number of households and new households, "refusals", "household temporarily away", "no one home after many calls", name and telephone number of interviewer, and number of hours spent on transmission, interviews and problems.
- Because of the problems associated with SLID in February, some interviewers did not believe that the survey would begin on time and did not really take the dates seriously. In addition, Mother's Day fell on the weekend of May 7, and both interviewers and respondents had family obligations.
- When the respondent refused to complete the interview, the interviewers could not ask whether the respondent would give permission to obtain the data from Revenue Canada; some asked the question anyway and put the answers in the notes. Should the question be sent by mail so that the respondent can think it over?
- Interviewers would like to have a reference card that would explain how to use some functions such as changing a name, or how to use the calculator in the income part.

- One interviewer would like to have more blank diskettes.
- Some interviewers use the *67 function to cancel display, or they prefer to work at the regional office in order not to receive telephone calls in the middle of the night. Other interviewers stated that traced respondents who have call display do not call them back if they recognize the telephone number.
- The interview time is relatively short. For three respondents who had completed the income questionnaire, the communication took 16 minutes. For another household, the interview took 8 minutes (one respondent had an income of $0 and the other had completed his questionnaire).
- Several ghost cases were encountered in May 1994. Interviewers did not know how to solve this problem and they put everything in notes. This situation should be corrected.
- The interviewer would like to be able to see on the screen the name of the person with whom he or she is speaking and the names of household members at all times.

PART B: RESULTS OF THE INTERVIEWER DEBRIEFING

PART 1: THE INCOME PACKAGE (Introductory letter, 1993 Income Questionnaire and Guide)

1.1 What percentage of respondent's completed their 1993 Income Questionnaire before you contacted them? (Give your best estimate)

None	3	=	4%
1% - 25%	44	=	67%
26% - 50%	15	=	23%
51% - 100%	4	=	6%

1.2 Did respondents like the appearance of the 1993 Income Questionnaire?

Yes	5	=	8%
No	8	=	12%
No Comments	53	=	80%

1.3 What percentage of respondents used the Guide? (Give your best estimate.)

None	4	=	6%
1% - 25%	47	=	71%
26% - 50%	10	=	15%
51% - 100%	2	=	3%
No Comments	3	=	5%

1.4 Did respondents like the appearance of the Guide?

Yes	5	=	8%
No	2	=	3%
No Comments	59	=	89%

1.5 List the <u>most frequent</u> negative and/or positive comments about the Guide:

2	Easy to fill out - straightforward
2	Those respondents who filled out the forms appreciated having them & the guide.
1	Guide more approachable - open format
4	Seemed complicated
2	No time to read guide.
3	Was not referred to by respondent.
1	Didn't receive comments about the guide, only about survey period, lots of refusals.
1	Question 27 - income total payable - beside this should be "Look up Line 420" net federal tax plus line 428 provincial tax. Because H & R Block does income you don't know what line name.
1	Most forgot to record income amounts such as G.S.T.
1	Preferred to go directly to Revenue Canada.
1	Preferred to call interviewer.
1	Older ones thought writing was too small.
1	Didn't receive mailed package.
1	Some said they had already sent the government enough information regarding income.
1	Use shaded boxes next time.
2	Too personal - didn't like it.

1 "Voluntary" - some objected to trying to persuade.

1 Do we have to do this for six years?

PART 2: MANUALS AND TRAINING

2.1 Did the Interviewer's Manual provide all the information you needed?

Yes	50	=	75%
No	16	=	25%

If No, what information was missing?

1 Trace cases not clear.
1 What does one do if respondent lived in an institution since last interview.
1 What is a "duplicate"?
1 Pour suspendre le depistage les instructions ne sont pas completes (à CMTRCSTAT2 on doit appuyer sur "Enter" deux fois).
1 Lors d'un refus l'écran CMSTNTT2 ne disparaît part pas si on fait "selectionner" on doit utiliser "F12".
1 Plus de détails sur la marche à suivre.
1 Il y avait rien sur le questionnaire sur le revenu de l'EFC.
1 Thought you were not supposed to collect income information for someone who was not traceable in January and did not participate in the January Labour Questionnaire.

2	Would have liked to see more information in manuals on income application (e.g. How to record loss).
5	Didn't come soon enough.
2	Needed workbook.
1	Too much on tracing, not enough on actual interviews.
1	Pages 61-65 in workbook should have been in manual.
1	Current OAS should be included. Many elderly people use direct deposit & do not know amounts of cheques.
1	Could have a sample of H & R Block form which they issue to customers. Then we could help them with what line to look up.
1	Basic rate charts for such things as GST, old age security, etc. Also for native canadians do not pay income tax and don't know how much subsidized income they receive. Charts with base amounts with provide some sort of estimate.
1	Very little comments on how to close off the assignment.
1	Seemed to be much more work and more time consuming than it really was.
1	Both manual & training workbook were not clear on how to add-up income when the respondent did not do it themselves.
1	No project code was given in manual and I received no covering letter.

2.2 Did the Training Workbook have sufficient practice cases and information to allow you to become comfortable with the income interview?

Yes	53	=	80%
No	13	=	20%

If No, what suggestions do you have to improve the Training Workbook?

10	Too late receiving manual.
5	Not enough time.
4	More practical cases & better follow-up.
1	Examples must be included to use the calculator & weeks of unemployment functions.
1	Page 69 examples should appear as a practice component of the training.
1	Need one case interrupted and show actual screens where it starts in various stages.
1	Should have 1 case where household develops into 3 or 4 additional calls.
1	A classroom setting would be much more helpful.
1	Have interviewer make more effort to look into tracing folder to research contents.
1	Make practice cases difficult to be ready for unforeseen problems.
1	Nothing on losses.

2.3 Did the four hour home-study give you enough time to read the Interviewer's Manual and to complete the Training Workbook?

Yes	36	=	55%
No	30	=	45%

If No, specify, in hours, how much more time you needed.

11	1 hour more
3	1\2 hour more
1	4 hours study
1	1-2 hours for exercises
1	2-3 hours more
1	5-6 hours more
1	8 hours more
1	entire afternoon
5	Didn't get training book - very difficult to comprehend without proper training material
2	Never did the complete package
2	Needed class training
1	Time on practice cases was not accounted for (i.e. 2-3 hours)
1	Because of delay in getting practice cases after workbook, many things had to be reviewed again when work finally arrived.
1	If Ottawa gets it to us in lots of time.
1	Don't know, didn't keep track of time.

2.4 After completing the home-study, were you clear about the difference between someone who had no income to report (<F12> function key to continue the interview) and someone who refused to answer the income interview (<F10> function key to end the interview for the person and assign a final case status code)?

Yes	53	=	80%
No	13	=	20%

PART 3: THE APPLICATION (PROGRAM)

3.1 Did you update the demographic information (for example, the marital status) for any household members due to a change in the composition of the household, a blank or incorrect information?

Yes	53	=	80%
No	12	=	18%
No Comments	1	=	2%

3.2 If Yes, did you have any problems?

Yes	18	=	27%
No	35	=	53%
No Comments	13	=	20%

If Yes, list the problems.

1	Went into practice case to become familiar with changing demographic info.
1	Dans la "Liste du ménage" au moment ou elle a ajouté un membre du ménage le programme a fait un "CRASH".
2	Respondent forgot to mention 2 children & could not go back to demographic info.
1	Computer asked for "Mise à jour" when all info. was already on screen.
1	Long period between demo & income report.

3	Couldn't change a girls maiden name to her new married name.
2	One case, I couldn't get in to change any demographic.
1	Names disappeared at time & often just jumped past screen.
1	Several times I got into the actual finances before someone noted: i.e. son had moved back or out in spite of reading the demographics. We need to be able to get back in.
1	Had trouble correcting the spelling of a name.
1	Name changed - pressed enter instead of F12 - too late to return.
1	Name change indicated after section where name could be changed.
1	Unable to access until after receiving workbook & finding out the F3 function at this screen.
1	Trying too quickly to remember & read on the screen what to do.
1	Couldn't change the age.
1	Computer sometimes didn't allow to make changes to info. entered in Jan.
1	Yes, if it there - names often not there, had to write names on paper.
1	Sometimes cursor would not move if I was trying to go back & collect on total income.

3.3 If No, was it because you did not know how to update the demographic information at the ROSTER?

Yes	7	=	10%
No	33	=	51%
No Comments	26	=	39%

3.4 What percentage of respondents gave "cents" when they reported income amounts? (Give your best estimate)

None	1	=	2%
1% - 25%	30	=	46%
26% - 50%	23	=	34%
51% - 100%	12	=	18%

3.5 Did you have a problem correcting an income amount when you made a keying error?

Yes	8	=	12%
No	58	=	88%

If Yes, describe the problem.

1	Cursor sometimes did not go where it should.
1	Computer should be able to compute "Total". Most people didn't record G.S.T.
1	Didn't have exercise book.
2	Difficult to get back into questions.
1	Couldn't figure out at first that all you had to do is re-enter correct amount.

3.6 Did you use paper and pencil during the Income interviews?

Yes	50	=	76%
No	16	=	24%

If Yes, what did you use it for?

1	Respondent angry about doing financial survey.

3	To speed-up telephone time if respondent was in a hurry.
2	Just to get it correct: respondents often read off their figures too quickly. Also because screen divided in 2 windows and you couldn't see the 1st part while in the 2nd.
1	When respondent called back to give info, but was in the middle of another file.
5	To add up total Income.
1	Subtract, addition or multiply.
5	To add up specific income or total for the year from monthly amounts.
2	Easier to add when respondent didn't have total income in item 26.
11	Names, phone # if call back required, dollar amounts if respondent didn't complete questionnaire.
1	Respondent hesitated or changed item.
7	Computer slower.
1	Computer difficulty.
1	To list the result of the phone call and any message pertaining to that household.
1	To jot down info until respondent was sure it was the correct amount from the needed line in income tax return.
2	Confused respondents who gave total amounts that required break-down. (e.g. CPP, OAS .... easier to put on paper then data enter, and when you had to look for correct spot to enter and amount).

3.7 Did you have any problems using the Trace application to find respondents?

Yes	20	=	31%
No	44	=	66%
No Comments	2	=	3%

If Yes, describe the problem.

2	Lack of knowledge of procedure - 1 manual not helpful and 1 manual great help.
1	Lack of practice.
1	A file on when a typing error was made.
2	Tracer: interviewers didn't know how to use tracing.
1	Result of last time's search did not seem to be there. Felt time was wasted doing the same thing that already was done.
1	Newly moved people - trace was very well set up for that.
1	"Lockerhann" error message - couldn't access
3	Too complicated and slow.
1	Some contacts refuse to give information.
1	Many respondents refuse to give contact person.
1	The "trace"is confusing and time consuming - a couple of times.
1	For entire survey (and french 02\94 Labour Component) - unable to enter tracer folder. I received "If error persists contact R.O. - unable at end of survey to assign a final status code....
1	We need to be able to see all notes at once. Contacts often out-of-date. Municipalities need to be listed with address.
1	Hard to record trace info that is not concrete but later may prove useful. (i.e. has a brother "Joe" but don't know where he lives).
1	Went better than in January.
3	found trace very cumbersome especially when moving a case back to telephone after getting some info from trace.

1 Trace function would not work. Not able to access the file.

3.8 If you were unable to Trace a respondent/household, what was the main reason?

1 Info not up to date.
7 Respondent moved and no address.
1 Lack of understanding of program.
1 Being able to access screen.
29 Contact person had no information or couldn't obtain new phone number.
1 Lack of information from family.
1 Tracer: even if interviewer chose "Dead End" if was possible to trace people.
5 No phone number.
1 Unlisted phone number.
1 Split families (e.g. woman living with another person and will not give number without permission)
1 "Lockerhann" error message.
1 Didn't have enough time to do it.
1 Inability to access employment.
2 Common names. (i.e. Smith, Wong - difficult)
1 Unable to make contact after a number of attempts.
1 Because Ottawa lost all of the trace information. I had spent a long time getting in January.
1 Had January already - still untraceable now.
1 A native family that have moved back to reserve and had no telephone.
1 Were not home or were not answering their answering machines.

1	Moved somewhere and didn't have a phone.
1	Inadequate trace information - wrong phone number, no phone number.
1	No leads.
1	Mainly because they had moved out of province - area had a lot of military respondents.

3.9 Do you have any suggestions to improve the Trace procedures?

1	Once in trace folder should be less complicated to get back out. Hard to get back to main server.
1	simple step or separate screens rater than split.
1	address where person moved should have gone to Personal Folder.
1	House description maps may be helpful.
1	Que le B.R. fasse mention de tout dépistage qui a été fait au bureau après la semaine d'enquête régulière.
1	Easier to do at work than at home.
1	second time had to start from scratch.
1	interviewers should have more details.
1	Put more emphasis in interviewer's manual on tracing and cases or exercise book.
1	Go in person to their last residence and obtain some information.
1	Last time's results.
1	Make it easier to get out of the first screen.
1	If answer is "No", would help if it went to Trace at once.
2	Need to have an "F" key that brings you right to contact's name. Right now is too long and time consuming.
1	Need more space to list name, phone number, and town of contacts.

1 Have interviewer trace on her own (do not transfer to trace) and if unable to find respondent then transfer to trace. When tracing on her own, she could make a temp note of methods used to trace and then, if case has to be put in Trace file - tracers will know what has been done - this would be faster and less confusing.

1 Let the trace unit before the survey starts and send "found" cases back to the field. Stop dumping valid numbers in the trace folder.

1 Need a "Note area" (separate screen) - where helpful info can be written.

PART 4: EDIT MESSAGES

4.1 Did the edit messages appear too often?

Yes	8	=	12%
No	57	=	86%
No Comments	1	=	2%

If Yes, what was the one that appeared most often?

5 Grand total not same as reported by respondent.

1 Grand total not in number 26.

1 Respondent forgot to mention source of revenue.

1 Uncommon amount.

1 Problems with computer.

1 Once all income was tabulated (i.e. Q. 26 and Q. 27), why after pressing ENTER was the last Q. 27 repeated?

1 Can't recall.

4.2 Did you know how to handle the edit messages that appeared?

Yes	62	=	94%
No	4	=	6%

If No, what edit was the most problematic and how did you solve the problem?

1 For total income - did not know how to return to correct errors.

1 Errors during transmission and not with respondents.

1 By trying "Enter" - the next step was self explanatory.

1 It would be helpful to know respondents answers to employment questions for 1993 that they gave in February.

4.3 Were the edit messages easy to understand?

Yes	64	=	97%
No	1	=	1.5%
No Comments	1	=	1.5%

4.4 Did the edit messages help you to detect typing (keying) errors?

Yes	43	=	65%
No	21	=	32%
No Comments	2	=	3%

4.5 Did the respondents become upset or annoyed when, as a result of an edit message, you questioned the income sources or amounts they reported?

Yes	8	=	12%
No	56	=	85%
No Comments	2	=	3%

If Yes, what did they say?

1	Told them something was wrong or incorrect amount.
1	Respondent not wanting to report social service income or UIC.
1	Insisted response was correct and computer wrong.
1	Said that figure was best they could give - take it or leave it.
3	No, but it depends on interviewers phrasing when questioning.
1	If someone said they didn't collect UIC and the edit window challenged them - they became defensive and usually said they couldn't remember.
1	No - apologetic for having missed something (usually UIC benefits).
	Yes - just repeated original figures - sounded annoyed - not actual gripe.
1	No, as long as only re-checked entry figure and did not challenge them.
1	Wondered how they know they should or did have UI or supplement income.
1	Most times they forgot about things like UIC or workers compensation.

1 Questioned why the program would not let you indicate "0" for income after it had asked you to confirm.

1 If asked of they got UIC they were upset.

PART 5: FEATURES AND FUNCTIONS OF THE INCOME

5.1 Did you use the <F1 = Help> function key?

Yes	56	=	85%
No	10	=	15%

If No, give the main reason why you did not use it?

3 Help key gave no help.

5 Didn't need it.

1 For codes.

1 Occasion did not arise.

1 Every time I did, a window came up saying "No help available on question asked".

1 Not too often.

1 Did not want to loose place during survey. Used calculator they had beside laptop. Felt more comfortable that way.

1 They called S.I. instead and I used the F-1 key.

5.2 Did you use the "Calculator" feature (F3 =Opt)?

Yes	28	=	42%
No	37	=	56%
No Comments	1	=	2%

If No, give the main reason why you did not use it.

7	Lack of knowledge.
3	Slower to use "calculator" feature.
4	More comfortable with calculator.
6	Didn't need it.
3	Didn't think to use it.
2	Problem using it.
2	No time to fully study the manual - (used my own calculator).
2	I used my own calculator - because there was so much computer trouble being experienced by other interviewers, I was fearful of any extra usage of functions for fear my computer went down - so I stuck to the basics.
6	Used my calculator.
2	No time to get comfortable with it before the survey (classroom training would have helped)
1	Yes, very limited.
4	Didn't realize it was there.
1	Once.
2	Did not received workbook till 4 cases left. Would have been BIG help if received sooner.
1	More practice on this feature in workbook would be helpful.
1	One interviewer used this feature and felt it was excellent.

5.3 Did you use the "View - Full Form" feature (F3 = Opt)?

Yes	33	=	50%
No	28	=	42%
No Comments	5	=	8%

If No, give the <u>main reason</u> why you did not use it.

16 Didn't need it.
5 Didn't remember to use it.
1 Got exercise book too late.
3 Didn't know about it.
1 Didn't have time to play around.
1 Had copies of the full form on hand.

5.4 Did you use the "View - Current Item" feature (F3 = Opt)?

Yes	35	=	53%
No	28	=	42%
No Comments	3	=	5%

If No, give the <u>main reason</u> why you did not use it.

2 Can't remember what it was for.
15 Didn't need it.
2 Got exercise book too late.
2 Didn't know about it.
1 Not comfortable with it.
1 Would not work on my machine.
1 Might have been natural to use if had time to use it before actual survey.

1 Forgot about it.

5.5 Did you use the "Weeks Calculation" feature (F3 = Opt)?

Yes	19	=	29%
No	46	=	70%
No Comments	1	=	1%

If No, give the <u>main reason</u> why you did not use it.

21 Didn't need it.
2 Got exercise book too late.
1 Didn't know about it.
1 Worried would get stuck and not be able to continue interview.
1 Used to paper and pencil and doing bookwork so easily calculated.
6 Used my own calculator.
1 Respondents would give an estimated amount as many did not have the SLID forms completed.
1 Too much to remember and get the data as well!
1 Lack of knowledge.
1 Forgot about it.

5.6 Did you use the "Household Demographics" feature (F3 = Opt)?

Yes	47	=	71%
No	15	=	23%
No Comments	4	=	6%

If No, give the <u>main reason</u> why you did not use it.

1	Didn't remember seeing it in manual.
7	Didn't need it.
3	Got exercise book too late.
1	Before making contact.
1	Yes, only source of list - no contact person on program.
1	Too much to remember and get the data as well!

5.7 Did the function keys and the application features work properly?

Yes	64	=	97%
No	1	=	1.5%
No Comments	1	=	1.5%

If No, name the function key or feature that did not work properly and explain the problem briefly.

2	Ignorance of computer.
2	Had some trouble viewing names through bar on roster screen.
1	Instructions to show a "loss" were incorrect.
1	Only used the F-3 on a regular basis.
1	Could not slide back.

5.8 Is there a function or feature that you would like to have available that was not part of the income application?

Yes	19	=	29%
No	39	=	59%
No Comments	8	=	12%

If Yes, specify what it is.

2	Liked to have name of person at top of income application at all times.
1	Computer should do "Total" on form automatically. (GST had to be added so respondent answers wrong).
4	Need to keep the telephone number.
3	Calculator able to add all items.
3	I would like a running total of income so that you could say - "So, your total income was... - Is that correct?"
1	I would like access to place of employment.
1	The ability to amend an error (i.e. when June 27 was entered with $71.00) inadvertently pressed F12 instead of enter F12, F12 amount lost - I added a permanent note to the New and Select Screen for the case.
1	One 84 yr old widow forgot to report a pension amount - I could not enter the case again to make the correction.
1	An indication of the 1st and last screen where name changes can be made.
1	Automatic add income feature.
1	To be able to bring up employment info given on February interview.
1	Not enough space.

5.9 Did you try to use the <F8> function key while in the INCOME part of the interview?

Yes	15	=	23%
No	46	=	70%

No Comments	5	=	7%

If Yes, did it confuse you?

Yes	6	=	9%
No	10	=	15%
No Comments	50	=	76%

PART 6: GENERAL INFORMATION

6.1 Did the respondents react positively to the possible use of income tax forms in future years of SLID?

Yes	31	=	47%
No	26	=	39%
No Comments	2	=	3%
Yes\No	7	=	11%

If No, what was the main reason they gave for the negative response?

16	Regard it personal information.
4	People preferred to be called personally.
2	Preferred to give info to interviewer than to Revenue Canada.
1	Too complicated, too long.
1	Didn't want to look for info or didn't have it.
1	Revenue Canada shouldn't have to give info to Stats Canada.
2	They feel it would avoid duplication of collection.

1	Mostly.
5	Yes.
5	No.
2	Want to provide their own information.
7	Said gov't has access to too much info already.
2	The few who agreed thought it would be beneficial - "I won't have to do this next year".
2	Not very definite - wanted to know why info was given.
2	Want to know when stats want any info about them.
1	Several respondents mentioned that if they said yes it would put us out of job.

6.2 Did you have to call back respondents to give them time to complete the 1993 Income Questionnaire?

Yes	61	=	92%
No	4	=	6%
No Comments	1	=	2%

6.3 If "Yes" in Question 6.2, was the 1993 Income Questionnaire completed when you called back?

Yes	26	=	39%
No	32	=	49%
No Comments	8	=	12%

PART 7: OTHER COMMENTS

6 Should be able to go back (i.e. if errors are made or to add things)

e.g. Should be able to get back into any question because sometimes respondents give answers and later give info to contradict previously given info and you can't go back to correct it.

8 Growing opposition to income questions

i.e. Many respondents said "Don't call me again". They completed financial, but don't want to be bothered again.

4 Gov't knows too much about personal file.

1 Provide tax line numbers for each line of the finance form.

2 Why did they have to give revenue twice?

1 H&R block did their returns - unable to give breakdowns. H&R does not return a copy of income tax form to clients. This did present some problems getting accurate, or any info.

3 Some forms still at "tax preparers".

No procedure for what to do if income tax not done or returned yet from Acct.

5 Some could only give estimates.

Many gave estimates because they couldn't be bothered (or didn't have time) to find their income Tax Form. Some who had done it electronically did not have a print-out.

1 A bother to fill out income questionnaire when paid someone to complete tax returns.

1 Q. - O.K. to get information from Revenue Canada?

Many said "yes" for themselves - could not answer for others - should have specified in manual "non-proxy"

Most respondents would have preferred to mail questionnaire back to R.O.

1 #15 - "Prov. Tax Credits"

People in Ottawa haven't a clue as to what is happening with "Prov. Tax Creds" in Sask. There is no line #479 on the T.G. Sask. Form. One has to get this info from TIC Sask. form, from line #588

1 Most would not reveal any lottery/gambling winnings even if they had any.

1 Most wondered if they had to give "written permission" for Stats Can. to get info. from Revenue Canada

1 Some respondent worried about losing working hours if Revenue Canada contacted directly.

2 Some respondent would rather give info to interviewer.

4 Interview too long

1 Does R.O. ever consider how much time & effort they are asking of respondents?

5 Time lag between components is great

3 Printed demographic information useful - too cumbersome & time consuming to return to View & Select cases.

i.e. phone A - no answer - exit case.

- phone information for B - got a refusal
- phone rings
- household A on phone - saw number on their telephone display.
- don't know if I've called them - takes <u>3 minutes</u> to bring back information
- they had called long distance.

1 Order of people listed on F3 demographics screen & case management component screen got mixed - resulted in wrong person being pulled up by error.

(i.e. N - 3rd person on component screen - one assumes it is the 1st person)

1 What helpful information if household moves to U.S.A.? Jan. - Canadian, May - U.S.A.. -Program error message arises when one indicates ’no income’ in May - Respondent has worked 52 weeks. (Source of income not Canadian).

1 Program was sloppy & not well organized - Data lost or incomplete - Transmission was a disaster - should have waited till some of the glitches were ironed out. Refusals may have been converted but a waste of time on longitudinal as they just give the run around on the next interview.

1 We are expected to act as professionals, yet the equipment we are given is not professional. Transmission was very bad. Delay in starting survey was not good for moral of interviewers. As a senior interviewer, I spent a great deal of time trying to boost moral of interviewers. One interviewer was tempted to quit Stats. - here now <u>only</u> for financial benefits. If computer problems are not resolved we may end up with interviewers working for a pay cheque only - thus less than accurate surveys and a high non-response and refusal rate. (Nancy O’Rourke)

1 Having to continually set up and not receive assignments as well as having to continue to set up for transmission when their assignments were completed was a waste of time and aggravating to the staff.

1 Transmission is not reliable

4 Many question the 6 year program (too long)
(Some no longer want to be on survey)

1 SLID easier to "sell" than anticipated.
Did not like having to re-contact respondents from 02/94, but most were alright about it - none changed their minds.
Several people surprised (& not too thrilled) when I said I would speak to them in 02/95 - expect refusals may escalate.

2 Respondents are tired of the surveys.

11 Need supplies/manual/questionnaire earlier, if not possible extension of time - too stressful.
Would have helped to received workbook with training manuals. Also to have had debriefing manual at the beginning of survey.
Would be helpful to have debriefing questionnaire during survey time period and home study.

4 Q. - Did you complete questionnaire? Many said they did not receive it.
i.e. Should have read "Did you receive it? Many "said" did not receive it and we did not have any back forms to mail to them.

3 People busy, had no time to fill out questionnaire ahead of time.

5 Lack of name for "contact person" made finding individual docket difficult - interviewers do not remember docket #, phone #, & address - quickest method - name.
i.e. upset that the contact persons's **name** from Jan. did not appear on the view screen. If they didn't remember the family, they had to write the respondent's name on paper.

1 Tel number unlisted - shouldn't be done in tracing but a personal interview.

2 Name of person was not with first income questionnaire.

1 Respondents name and phone number should be displayed at all times.

3 Components Screen - add phone number for call backs.
i.e. When had to call later for income info - did not have telephone number.

1 Tracing and notes very weak at times

2 If I am a "tracer", why am I spending so much time interviewing that I can't get the tracing done.

Why is tracing a dumping ground

If someone can't reach the respondent, but can verify the telephone number why send it to a tracer.

If tracing done sooner - solved cases could go back to interviewer for completion - & packet could be mailed to new address.

1 "Mushroom effect" difficult, e.g. single girl - part of survey last year - gone back home - her parents & siblings have never heard of LFS or this survey.

2 Member moved out. Couldn't be traced and questions came up for the following survey for the member that moved out.

1 Including completely unrelated people in a new household <u>not</u> well received. e.g. son moves from parental home (original listing) - shares rented apt. with unrelated friends - these people just share housing costs - these joiners are very resentful of being in this survey - often original son/daughter is resentful - parents responded in the past - they may not even have been aware of survey.

1 Hard to get trust of contact when doing a trace if all you have to say is "I'm calling from Stats. Can. & trying to contact Jane Doe. Can you help me?". No useful tool to use to show this is a legitimate request.

1 If would be helpful to know the relationship of contact to respondent.

1 Need examples of household level refusals to learn how to complete refusal notes for Senior Interviewer.

1 Token of appreciation should be given to respondent.

1 Perhaps a "thank you letter" with some Statistical information could be sent to the respondents with a reminder that they will be re-contacted next near **OR** the Labour part of SLID with household composition update in January with a mail to R.O. income questionnaire.

3 Often had to call several times before being able to complete interview. Some respondents became annoyed.

1 SLID update - too hurried. No time to call back after a few days.

1 Collection time for this survey was too short. Having two back-to-back surveys (SCF/SLID) was hard to cope with. Partial interviews went right on through to H.O. Very discouraging after persisting efforts.

1 Didn't know respondent - made it difficult.

1 View and Select screen should have name of last Contact Person.

1 Notes (F11) ended up in all folder or the wrong case.

2 Names turned around and letters mailed to children.

1 Didn't appreciate having to have 3 different entries for "Nom des gens" "Meilleurs moment" et "no. de telephone".

1 Gave time to get their working copy.

2 Lack of time to appreciate computer - computer problems

3 Need classroom training with so many computer functions.

1 In View and Case Management for tracing should be easier way of giving a final status code without going in demographic file.

1 Should be one status for answering machine.

1 Final or suspend comes on screen - have to press "final" or "partial" - should code itself.

2 For R.O. tracer follow-up - everything goes in Trace Folder - too much time.

2 Would like to see the exit component return.

2 Hard refusals hadn't been removed.

1 At the end - "information received by" - there should be a category for "non household member".

1 Would like to change the "best time to call" - many redundant messages in there.

1 "Best time to call" - could this be altered or allow us to change it as long interviews must be scheduled at different times.

1 Used a lot of paper to keep notes

2 Need large note section for explanations. 3 or 4 lines would be helpful so S.I. gets a clear picture of problems encountered.

1 Survey well laid out; liked the calculator; reminders about certain items helpful; survey went faster then LFS survey.

1 All LFS interviewers should be involved

1 Should have made them respond to debriefing as soon as assignment was done.

1 SLID new, probably forgotten a lot of the problems encountered

1 Send this before SLID is over - too much time has passed and my head is now into LFS. The majority of my refusals were from people who didn't receive the info package. The mail-out seem to reassure the respondents who are unsure about the interviewers identity - gives the survey an official tone.

4 Difficult to remember things "after the fact". If I had known I was a member of the debriefing force from the beginning, I could have made notes of problems etc.

1 Not clear that a 'final status' code would not lose the case so that it could not be accessed again.

1 Work load report didn't seem accurate near the end of the survey - (Mine didn't balance by 2)

1 Should be able to hit F12 once if it is the same as last year, rather than a dozen times to get out of that screen.

1 Some interviewers assume all persons over 65 get the full O.A.P. and fill in the line accordingly. However, not everyone collects the full O.A.P. Sometimes have to be paid back. Also, this payback also applies to U.IC.

if income is past a certain amount. I don't think this is reflected in "Total Income"

1 Project Code on front cover in large print.

1 People still miss the correct amount in item 27 even though it says "Federal & Provincial". They do not look at the guide. There could be more information on the questionnaire (i.e. "Add lines 420 & 428 from your income tax form"). For some reason respondents were very annoyed at SLID income compared to SCF during the week before. A lot of complaints about govt & desire for privacy.

1 Had problems going back from #27 to correct #26, getting from trace back to telephone screen to bring up forms. Phone # should show up on every screen.

1 When cents were entered L26 did not allow for these entries.

1 Impressed with how much quicker the income part of SLID was.