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**SUMMARY OF INTERVIEWERS DEBRIEFING  
QUESTIONNAIRES: 1995 MAY INCOME INTERVIEW**

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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](mailto:GILES@STATCAN.CA)), by telephone (613) 951-2891, or by fax (613) 951-3253.



## **EXECUTIVE SUMMARY**

In May 1995, the second income interview was conducted for the Survey of Labour and Income Dynamics (SLID). Data on income was gathered using computer-assisted interviewing (CAI).

For the first time, respondents were offered the choice of having their income information collected by interview over the telephone or, by giving their permission, allowing Statistics Canada to obtain their income sources directly from their Revenue Canada tax records.

This report is based on comments from a sample of interviewers from each regional office who were selected to complete a debriefing questionnaire to evaluate the SLID 1995 Income Interview.



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## **Introduction**

In May 1995, the second income interview was conducted for the Survey of Labour and Income Dynamics (SLID). Data on income were gathered using computer-assisted interviewing (CAI). For the first time, respondents were offered the choice of having their income information collected by interview over the telephone or, by giving their permission, allowing Statistics Canada to obtain their income sources directly from their Revenue Canada tax records. Prior to the interview, respondents were sent a newsletter explaining the new method, and a form with the permission question along with a list of the income questions that would be asked if they preferred to be interviewed. (Appendix A)

This report is based on comments from a sample of interviewers from each regional office who were selected to complete a debriefing questionnaire on the SLID 1995 Income Interview. The debriefing questionnaire was used to assess respondents' reaction to the new option for collecting income information, and also to assess the interviewers' reaction to changes or features of the CAI application. A copy of the debriefing questionnaire is available in Appendix B.

The 'yes' or 'no' responses to the questions asked in the debriefing questionnaire have been summarized in table format at the Canada level, and also for the individual Regional Offices (included in Appendix C). A summary of interviewers' responses is also provided following every question. Responses and comments are generally consistent across all regional offices.

Of main interest was the first question, which asked about respondents' reactions to the question of directly accessing their tax records from Revenue Canada, and what the main reasons were for those who did not give permission. The responses were rated according to how favourably the interviewers' sample responded, and

are presented in table format with a description of comments on their reactions in question 1 and question 1A.

### **PART I: The Application**

**Question 1:** How did the respondents react to the question of getting their information directly from the tax files?

Regional Office	# Interviewer Responding	Good or No Problem	Accepted but some Problems	Poor, or yes Problems
Atlantic	13	6	6	1
Montréal	11	6	4	1
Sturgeon Falls	5	2	3	0
Toronto	19	11	6	2
Edmonton	13	5	8	0
Vancouver	4	2	2	0
<b>Total</b>	65	32	29	4

#### **Comments:**

- C Approximately 49%, (32/65) of the interviewers stated that their respondents responded favourably to allowing access to their income tax files.
- C Some respondents enjoy the personal contact involved in doing surveys over the phone.
- C Some felt that this 'direct' route would be more accurate.
- C Younger, well-educated respondents and some seniors seemed to be more open to this option as it was less complicated for them. Persons living in



rural areas and other seniors were relatively more suspicious and mistrusting of government.

- C Many respondents thought that the government already had access to income tax files anyway.
- C Respondents who were a little hesitant to agree at first were primarily concerned about having their names attached to the information being released.
- C 45% (29/65) of the interviewers stated that most of their respondents agreed to the direct income tax route. However, they had some difficulty with other respondents who preferred to give their information over the phone.
- C Many of the respondents had to answer on the part of other family members and were quite surprised that no signatures were required to give permission. While some wouldn't want to sign to save time, it seems that many would feel more secure if they were required to sign documents giving permission. Interviewers commented that this would imply no breach of confidentiality on the part of Revenue Canada and Statistics Canada.
- C 6% (4/65) of the interviewers had little or no luck in persuading their respondents to opt for the direct tax route. Interviewers receiving very negative reactions from respondents to this question, were mainly the ones who were dealing with refusals.
- C In general, many of those who chose to authorize access did so for the purpose of not having to be re-contacted again.

**Question 1A:** What were the reasons for those who did not give permission?

- C Many of the respondents felt that government already has too much information on them anyway and so didn't want them digging in their

income tax files. Some respondents who had previously thought that government already had access to their income tax files but were then told otherwise, decided to refuse the direct tax route simply because they could keep that from the government who already knew too much. They were pleased to hear that Statistics Canada needed permission to access their tax files.

- C Many felt that it was confidential information and a private matter.
- C Respondents want to keep ‘control’ of their personal affairs.
- C Respondents preferred to give the information over the phone. Some interviewers reported that some respondents do not realize that direct access to their tax records would only be for the duration of the survey, or that their income information wouldn’t have their names attached to it.
- C On a good note, since some respondents enjoy partaking in an interview and like the personal contact, they would prefer being interviewed again in May.

**Question 2:** Did you have a problem correcting an income amount when you made a keying error?

	#	%
<b>Yes</b>	3	4.62%
<b>No</b>	61	93.85%
<b>N/A</b>	1	1.54%

Problems for those who responded ‘yes’ to this question are:

- C When a box appeared which read ‘May have missed UIC amount’, had trouble continuing with the form. If no estimate was used, didn’t know how to proceed.
- C It took several tries to correct a keying error and occasionally had to return to the first screen of the income form.

C Unable to return to a previous question or correct an error.

Other comments from interviewers who responded 'no' to this question:

C Changing a total income was a problem, and after figuring it out, it was still a little awkward.

C After a keying error, kept trying until it was correct.

**Question 3:** Did the “Running Total” help you correct keying errors as they happened?

	#	%
Yes	50	76.92%
No	12	18.46%
N/A	5	7.69%

While this question had no comment box, some comments were offered anyway. Two interviewers responded 'no' to this question simply because they didn't need this option or hadn't done any keying errors. One interviewer commented “but I like that running total.” Another said “No, because I didn't have any typing errors, but I really liked the feature.”

Those who responded 'yes' to this question provided comments such as “I liked that feature,” “Wonderful,” “Very useful.”

**Question 4:** A list of income sources appears when you enter an amount in “other income” (INC-Q17,23,24,25) Did you find this list useful?

	#	%
Yes	58	89.23%
No	5	7.69%
N/A	2	3.08%

**Question 5:** In 1994, respondents were asked to calculate their total income. In 1995, total income is automatically calculated by the application, what is your opinion on this new feature?

Unanimous favourable response was received for this question. Some comments were:

- C “Great, Excellent feature, keep it”
- C Took pressure off interviewers, feature greatly appreciated.
- C The feature reduces the human error factor in calculations either from the respondent or from the interviewer. It was more accurate and much easier to calculate the respondent’s total income.
- C The feature allowed double-checking and correcting errors for those respondents who had filled out the form and/or provided only estimates. For those who hadn’t filled out their form prior to the interview, this feature made it easier for the interviewers to complete the information.
- C When verifying total income, the feature allowed respondents to remember other sources of income that hadn’t been taken into account previously, when income totals didn’t add up.
- C It shortens the interview, makes the survey process more efficient and greatly reduces a respondent burden.

Three interviewers expressed that the feature was fine but commented that:

- C When there were items marked F5 or F6 (refuse or accept), then the totals weren’t correct and was sometimes hard to change.

- C The feature worked well unless an entry was forgotten and the total had to be changed. Once the computer calculated the total one time, this function did not work the second time. Running total did help here though.
- C When some respondents who knew total income, but not each source amount, several times on keying income total (and before they could get to payable income tax), the case disappeared from the screen.

**Question 6:** Did you use paper and pencil to calculate amounts during the interview?

Comments for those who answered 'yes' to this question include:

	#	%
Yes	22	33.85%
No	43	66.15%
N/A	0	0.00%

- C The 'F3' computer calculator works well but instinctively use a hand calculator. Old habits die hard.
- C Easier and faster to use paper and pencil or hand calculators than using the F3 calculator
- C Sometimes use a hand calculator when have items to combine such as two or more pensions, and also to calculate monthly totals.
- C It is easier to calculate quarterly GST totals with hand calculators.
- C The computer calculator makes the screen 'too busy'. Some don't like the numbers in the row form, prefer the hand calculator layout.
- C Afraid to use the F3 calculator and make the respondent wait. More comfortable using hand calculators.

Though space for comments is not provided when answering 'no' to this question, one interviewer commented that the F3 option was very practical.

## **PART II: Edit Messages**

Edit messages in the Income application advise interviewers of inconsistencies in responses. For example, if in the January Labour Survey a respondent claims that he/she receive Unemployment Insurance benefits, but forgets to claim it as income in the May Income Survey, an edit message will appear to let the interviewer be aware of the inconsistency. There are six edit messages in the application. Four of them pertain to wages, Social Assistance, Workers' Compensation, Unemployment Insurance benefits, and the other two pertain to Old Age Security (OAS).

**Question 7:** An edit message appears when a person has not reported any amounts, "Can you give me an estimate on total income ?" If 'no' is chosen a list pops up,

**Question 7A:** Was this list Complete?

	#	%
Yes	54	83.08%
No	2	3.08%
N/A	9	13.85%

One interviewer who answered 'no' to this question commented:

C 'Don't remember the pop up list, only the edit message.' In other words, this interviewer never needed to use the pop up list, so doesn't really know if it is complete or not.

One Interviewer who responded yes to this question noted that the list won't pop up if F5 refuse or F6 Don't Know is used.

**Question 7B:** Was the list easy to understand?

	#	%
<b>Yes</b>	54	83.08%
<b>No</b>	1	1.54%
<b>N/A</b>	10	15.38%

There was only one interviewer who answered ‘no’ to this question. He/she commented that the list “confused some of us, some thought it was unnecessary.”

**Question 7C:** Did the respondent often say ‘yes’ to this edit?

	#	%
<b>Yes</b>	28	43.08%
<b>No</b>	23	35.38%
<b>N/A</b>	14	21.54%

**Question 8:** Did the edit messages appear too often?

	#	%
<b>Yes</b>	3	4.62%
<b>No</b>	58	89.23%
<b>N/A</b>	4	6.15%

Some interviewers expressed the opinion that the edit messages were very helpful, but a small minority responded ‘yes’ to this question;

- C Two of them found that the Unemployment Insurance message was the most bothersome. Respondents who had either run out of U.I. or didn't qualify -including the self-employed, were very angered and sharp by this specific query.
- C Another interviewer was bothered by the edit message where you had to enter zero because they had no income.

**Question 9:** Did you know how to handle the edit messages that appeared?

	#	%
Yes	60	92.31%
No	1	1.54%
N/A	4	6.15%

Only one interviewer answered 'no' to this question but it was mainly the response given for question eight where they found that the Unemployment Insurance edit message was bothersome. The majority knew how to handle the edit messages.

**Question 10:** If you did not enter an amount in OAS/GIS - Spouse All and the respondent was 65 years old or over an edit message would pop up. "Normally persons aged 65 or over receive this type of income. Did we miss it?"

**Question 10A:** Did you find this message useful?

	#	%
Yes	53	81.54%
No	6	9.23%
N/A	6	9.23%



There were six interviewers who responded ‘no’ to this question. Their comments included:

- C Some respondents immigrated to Canada later in life so didn’t qualify for OAS.
- C Three interviewers did not find this message useful simply because they had never encountered this message.

**Question 10B:** Was this message confusing to respondents?

	#	%
Yes	3	4.62%
No	57	87.69%
N/A	5	7.69%

**PART III: The Income Form**

**Question 11:** Were the two options (ie to give permission to use the tax file or complete an interview) presented clearly on the form?

	#	%
Yes	52	80.00%
No	9	13.85%
N/A	4	6.15%

There were nine interviewers who responded ‘no’ to this question. Their comments included:

- C Bolder print or different colours were suggested for the statement to stand out.
- C Since it was the first year for the direct tax route option, the statement should have been more positive and detailed.
- C Since many respondents either missed the statement or never received the newsletter, interviewers found themselves reading the newsletter to them.
- C Some interviewers never received the form so they couldn't really comment.

**Question 12:** Were the instructions clear on the form?

	#	%
Yes	56	86.15%
No	6	9.23%
N/A	3	4.62%

There were six interviewers who responded 'no' to this question. Their comments included:

- C Several respondents have been mailing the forms back. It should be emphasized that they are not to mail them back and that they are to hold on to the form until the interviewer contacts them.
- C Missing precision in instructions.
- C Information in the second box of the income form was missed by most respondents. If information was included in the first box and printed in bold, it would be difficult to miss.
- C Suggestion made to put line numbers as per the tax forms or T-slips, or like the reference sheet provided to interviewers.

#### **PART IV: The Newsletter**

**Question 13:** What was your overall impression of the newsletter?

- C Informative, well presented, upbeat, easy to understand, attractive in appearance, great graphics and liked the arrows.
- C Many of the newsletters were never received, this slows down the survey process.
- C Many found the newsletter a very helpful tool when dealing with respondents, especially in trying to convert refusals.
- C Many found the listed expectations of the survey results interesting. Comparisons between '93 and '94 described the disparities within Canada well.
- C Instructions for respondents to 'not mail' the questionnaire were not clear enough. Some thought that the language could have been simplified further.
- C Perhaps a more official looking letter would work best, people have a habit of throwing away mail that may look like junk mail.
- C SLID should inform respondents of government policies and programs being implemented using statistics from this survey as a motivational factor.
- C Objectives and definition of SLID should be explained in every newsletter sent in order to refresh the respondent's memory.
- C Many interviewers liked the idea that the survey was not mandatory, as well as the explanation on confidentiality.
- C Extra newsletters should be sent out for handouts!

**Question 13A:** What was the respondent's reaction?

- C Those who received and read it, were more willing and ready to be surveyed. Many of those who read it ended up giving permission for the direct tax-route.
- C It was informative, had a nice format with nice colours and graphics.
- C The newsletter is an important part of the survey. It helps the survey a lot if they understand it
- C Some enjoy feeling part of the survey and helping, they also appreciate being kept up to date.
- C Few negative comments, some thought it was a waste of money and others questioned what good it would do.
- C Some thought it was too wordy, should be more precise.
- C Some didn't bother opening the envelope and/or through it away. Respondents are getting tired of the survey.
- C A few seniors remarked that the graphics on the front of the newsletter did not include anyone in their age group.

**PART V: Manuals**

**Question 14:** Did you find the questions and answers useful?

	#	%
<b>Yes</b>	64	98.46%
<b>No</b>	0	0.00%
<b>N/A</b>	1	1.54%

In the Interviewer's manual, questions and answers pertaining to possible problem situations were provided. These were found to be very useful. Many of the

interviewers pull them out of the manual and highlight the important points. These are then kept handy for reference when speaking to a respondent. They also use them to 'sell' the survey to respondents.

**Question 15:** More information on pension income and disability income was included in the interviewer's manual. Did you find this information useful?

	#	%
Yes	59	90.77%
No	2	3.08%
N/A	4	6.15%

There were only two interviewers who responded 'no' to this question;

- C One of them commented "People don't usually break down their incomes that exactly."
- C The other responded 'no' because they didn't need the information for their sample but also noted that it would be useful "to probe an unclear respondent."

#### **PART VI: Other Comments**

- C Trace Notes and Permanent Notes were missing. The majority of interviewers found this very frustrating, especially for tracing. (Best times to was call missing for example.)
- C Need more room to record notes !! (ie., to include explanation as to the reason for refusing to partake in the survey)
- C Once the demographic questions were completed, unable to go back into previous screens in order to edit the previously entered data such as last contact. Similarly, other interviewers have commented that when they

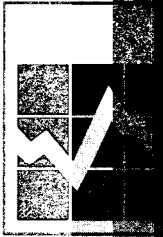
wished to re-enter into a respondent's income questionnaire within the application after it had been completed, that the case left the screen and they couldn't edit the income information or look at the last contact.

- C Interviewers should enter their work numbers in the permanent notes so that it can be known what has been done and by whom. For example, tracers want to know where the last tracer ended their search to not waste their time re-doing what the last tracer did.
- C Why is there no code to enter when an answering machine picks up?
- C Most interviewers were very annoyed that so many of their respondents had not received their Newsletters. This caused the interview to be lengthened as interviewers found themselves reading portions of the newsletter to respondents. They were also frustrated because even those respondents who had received the newsletters, many did not even bother to read it.
- C Some also found that those respondents who had read the Newsletter were more willing to participate with the survey and were more willing to allow the direct income tax route.

APPENDIX A:

NEWSLETTER AND INCOME FORM SENT TO RESPONDENTS  
MAY 1995

## NEWSLETTER



SURVEY OF

Labour

AND

Income  
Dynamics**Welcome to Spring! A new beginning . . .**

*In May, the Survey of Labour and Income Dynamics (SLID) will be collecting information about your income to help find out how people's standard of living varies due to changes in work, pensions or benefits. Some of us are better off than last year, while others have suffered a drop in income. As a society, we need this kind of information to make informed decisions about how our tax dollars should be spent.*

**A new way!**

*Times are changing and so is our survey. Much of the information we need is found on your income tax form. Last year, we asked if you would prefer us to use your tax records from a Revenue Canada computer file instead of asking income questions in an interview. More than half of you said "Yes." As a result, we are offering you a choice. With your permission, we could use your tax records from Revenue Canada. This new option would reduce costs and save you time and effort. Otherwise, you can decide to give your income information over the phone. The newsletter gives more details to help you choose an option. One of our interviewers will contact you to find out what you have decided.*

**Thanks again!**

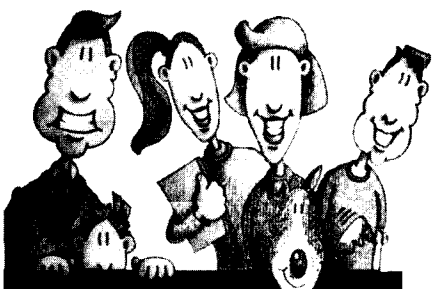
*You have contributed a great deal to this study. We hope that you will continue to be a part of our survey. If you would like more information about SLID, please call Brenda Grambicka at (403) 292-6766, or for toll-free calls, dial 1-800-504-5552.*

Sincerely,

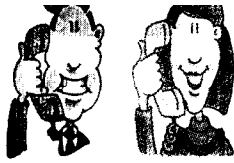
Director, Prairie Region


 Statistics  
Canada
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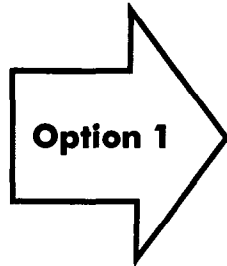






## ***It's your choice!***

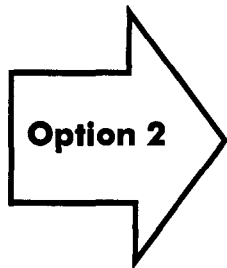
Everybody in your household has a choice. To make it easier for all of you, each person 16 and over has a personalized form. Please show this newsletter to others living with you, give them their income form and ask them to mark their choice. When you are contacted, let the interviewer know everyone's choice.



If you give us permission to use your tax records we will contact you only once each year in January, to ask questions on jobs and family changes. We will use your tax records to obtain the income sources you see on the SLID form, and this only while you are in the survey.

Mark the first box on the form and keep it by the phone until the interviewer calls.

**OR**



If you prefer to be interviewed or did not complete a tax return, we will continue to call you twice a year, once in January and again in May for income information.

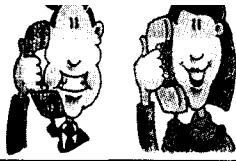
Mark the second box on the form and please take a few minutes to enter your amounts on the form. The last two pages of the newsletter will help you. Then wait for an interviewer to contact you to complete the interview.

**Note:** Do not complete an income form for anyone in your household who, since January, is no longer living with you, is deceased or is a new member.

## ***How safe is my information?***



Statistics Canada has always been successful in protecting your identity and we will continue to do so. We are changing the way we do things, but not our commitment to keep your information confidential. With your permission, we will access your tax records, but no one, not even Revenue Canada, can identify you from SLID information.



## Why income information is important

Last year, across Canada, over 25,000 of you participated in the SLID income interview. You played a vital part in helping us build a better picture of what life is like in Canada. Here is what you said about your income in 1993 and what your 1994 income information will show.



Of people 15 years and over, about 60% earned wages or a salary.



How many of these workers had a drop or an increase in their wages? Was this due to a job change?



About 1 in 10 people aged 65 or over were still earning income from a job, their own farm or business.



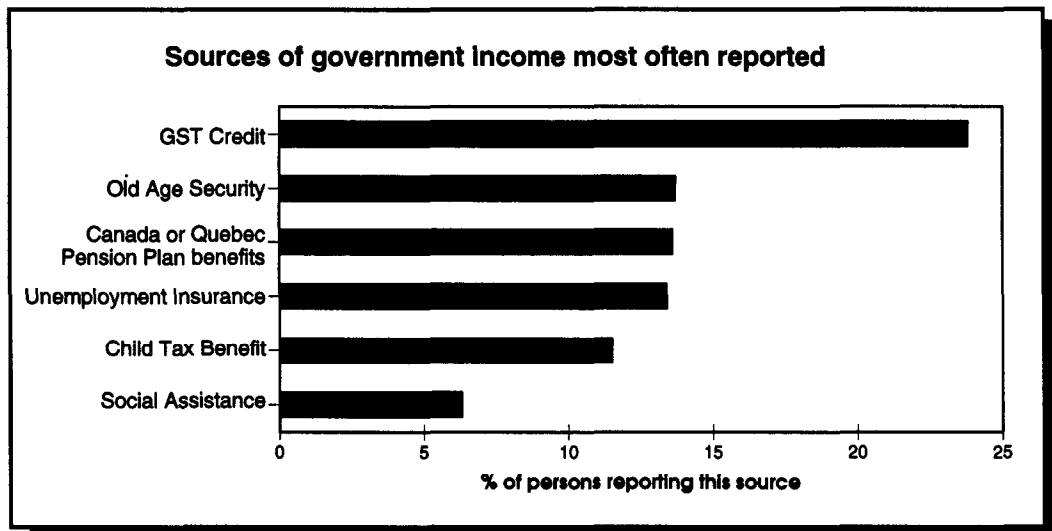
How many of them retired during the year? How old were they when they retired? How did it affect their income?

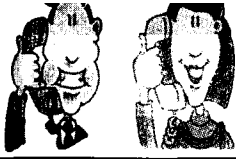


Many of you reported at least one source of government income.



Are these families and individuals still receiving income from these same sources? Did those people who received unemployment insurance find a job? Have they turned to self-employment?





About 1 in 10 earned income from their own farm or business. Of those, 10% reported a loss.



Is the farm or business still going? Are those people who had a loss in 1993 faring better? Is this income accounting for more or less of the family's total income compared with last year?



About 20% of people attended high school, college or university during the year and a third of them received a certificate, a diploma or a degree.

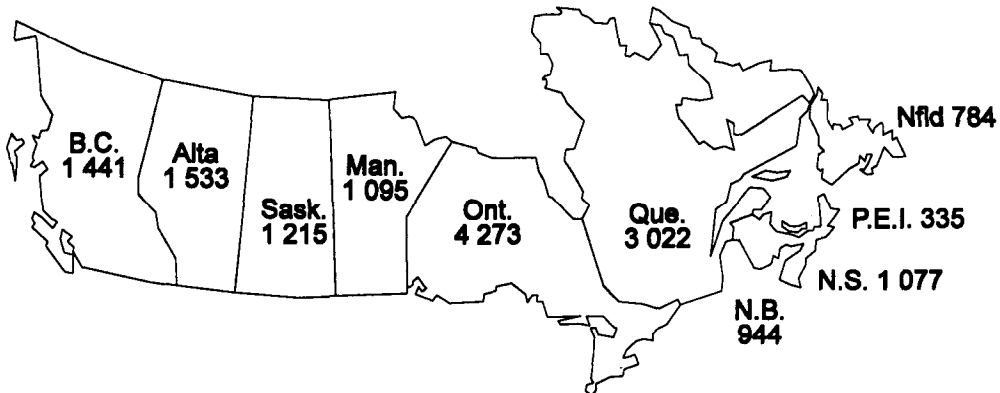


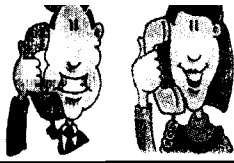
Did they find a job related to their studies? How long did it take them? As new workers, what is their income level?

### ***You are important***

Every selected household is important. Each one represents many other households in its community and province. Your answers combined with others will provide a better understanding of how people in Canada are getting along financially.

***Numbers of homes interviewed in each province***





## More Help to Complete the Form

- Answer as best you can. If you do not have exact numbers, give your best estimate.
- If you have a 1994 tax form, please refer to it. To help you, we give line numbers below so you can simply copy the amounts.
- If you immigrated to Canada in 1994, report only the income earned since your arrival.
- For an income loss, write "LOSS" above the amount.

**1** **Wages and salaries** from all jobs, before deductions. Include military pay and allowances.

- *Line 101.*
- *Report commissions, tips, retiring allowances, severance pay, wage loss replacement and supplementary unemployment benefits in items 23 to 25.*

**2,3** **If self-employed in 1994,** report net income. This is your gross income less operating expenses, depreciation allowances and capital cost allowances.

- *If partnership, report your share only.*
- *If incorporated, report income in item 1 and/or 5, as done for tax purposes.*

**2** **Farm self-employment net income:**

- *Line 141.*
- *Report rent from farms leased to others in item 7.*

**3** **Non-farm self-employment net income:**

- *Lines 135, 137, 139 and 143.*
- *Include fishing income compensation payments (eg. NCARP, TAGS) for self-employed fishermen.*

**4** **Interest** from accounts in banks, credit unions, trust companies, etc., on guaranteed investment certificates (GICs), Canada Savings Bonds, other government bonds, mutual funds, Treasury Bills and life insurance policies. Include interest and dividends from outside Canada.

- *Line 121.*
- *Report interest only, not the principal.*
- *For joint accounts, report your share only.*

**5** **Dividends:** Report taxable amount from Canadian corporations.

- *Line 120.*

**6** **Taxable Capital Gains** as reported for tax purposes.

- *Line 127.*

**7** **Other investment income** not reported above such as net rents for leased farmland, etc.

- *Line 126.*

**8** **Child Tax Benefit:** To be reported by parent who receives cheque from federal government.

- *Report Manitoba "CRISP" payment in item 12.*

**9** **Old Age Security Pension, Guaranteed Income Supplement and Spouse's Allowance:**

- *Line 113 and 146 (or line 146 only for form T1S-B/T1S-C).*

**10** **Canada or Québec Pension Plan benefits** received for:

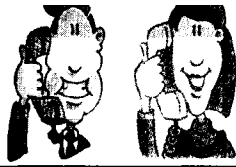
- retirement
- disability, including benefits for dependent children
- surviving spouse
- orphan's benefit
- *Line 114.*
- *Report retirement pensions from company or union-sponsored plans in item 18 or, if received from outside Canada, in items 23 to 25.*

**11** **Unemployment Insurance benefits** for job loss, sickness, maternity, paternity, adoption, job creation, work sharing, retraining and benefits to self-employed fishermen.

- *Line 119.*

**12** **Social Assistance and Provincial Income Supplements** from any provincial or municipal programs for persons whose income is not adequate to meet basic needs. Include benefits for food, fuel, shelter, clothing, special needs and payments from work incentive programs.

- *Line 145.*



### **13** Workers' Compensation benefits from any provincial government compensation plan.

- Line 144.
- Report benefits from any non-government plans in items 23 to 25.

### **15** Provincial Tax Credits – except Québec and Saskatchewan:

- Line 479 (and 480 in Alberta).
- Not applicable for Saskatchewan.

#### *Québec residents only:*

- Sum of lines 458 to 461 on Québec 1994 Income Tax Return.

### **16** Veterans' Pensions and Civilian War Pensions and Allowances from Veterans Affairs.

- Report regular retirement pensions from the Canadian Armed Forces in item 18.

### **17** Other income from government sources not reported above, such as:

- payments from federal or provincial governments for training programs
- property tax reductions and rebates
- regular payments from provincial automobile insurance plans (exclude lump sum payments)
- payments under the Quebec Program for Older Worker Adjustment (POWA)
- NCARP and TAGS payments for employees in the fishing industry
- Québec Maternity Allowance

Please specify the source of this income.

### **18** Retirement pensions, superannuation and annuities, excluding RRSPs:

Include pension income and survivors' benefits from an employment pension plan and annuity benefits that do not come from matured registered retirement savings plans.

- T4A slip-boxes 16 and 24, T3 slip-box 31, T5 slip-box 19.
- Exclude return of contributions from a pension plan.
- Report severance pay and retiring allowances in items 23 to 25.

### **19** RRSP annuities received from a matured Registered Retirement Savings Plan and withdrawals from a Registered Retirement Income Fund (RRIF).

- T4RSP slip-box 16 and T4RIF slip-boxes 16 and 20.

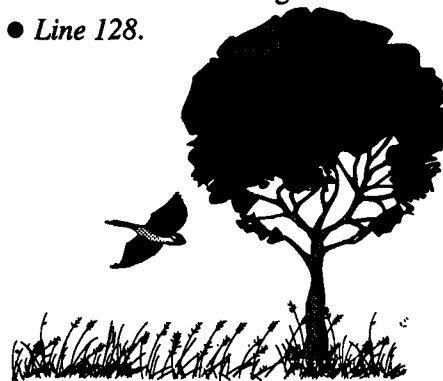
### **20** RRSP withdrawals:

- T4RSP slip-box 22.
- Exclude tax-free withdrawals used for purchasing a home.

### **21** Alimony, separation allowance, child support:

Include benefits received under a court order or written agreement.

- Line 128.



### **23,24,25** Other money income not reported above such as wage loss replacement benefits, employer or union supplementary unemployment benefits for lost earnings due to illness, layoff, etc., payments from Children's Aid, interest from loans or mortgages, regular income from an estate or trust fund, etc.

Include wage loss replacement benefits, employer or union supplementary unemployment benefits for lost earnings due to illness, layoff, etc., payments from Children's Aid, interest from loans or mortgages, regular income from an estate or trust fund, etc.

- Line 104 and line 130.
- Also include inheritances and lottery winnings.

Please specify the source of this income.

- Exclude proceeds from the sale of property, businesses, financial assets or personal belongings, income tax refunds, loans received, loans repaid to you as the lender, refunds of contributions to work-related pension plans.

### **What was your Income Tax on your 1994 income?**

Report federal and provincial tax payable on your 1994 income.

#### *All provinces except Québec:*

- Sum of line 420 and 428 (or line 435 only for form T1S-A/T1S-B).

#### *Québec residents only:*

- Sum of line 420 from the federal tax return and line 450 from the Ministère du Revenu du Québec 1994 Income Tax Return.
- Subtract sum of lines 445 and 446 on the Québec return.





# Survey of Labour and Income Dynamics (SLID) 1994 Income Form

Collected under the authority of the Statistics Act, Revised Statutes of Canada, 1985, Chapter S19.

Confidential when completed



Name: \_\_\_\_\_

Français au verso

**Your Choice**



I give permission to Statistics Canada for SLID to use my tax records.  
(Do not complete this form)



I prefer to be interviewed.  
(Please complete this form)

- For more information, refer to the Newsletter.
- Keep this form until your interviewer calls.
- DO NOT MAIL THIS FORM.

During 1994, what was your income from the following sources?

	Dollars	Cents
1. <b>Wages and Salaries</b> before deductions	1	
2. <b>Farm self-employment net income</b> , including farm program payments and rebates, Canadian Wheat Board payments, crop insurance, etc.	2	
3. <b>Non-farm self employment net income</b> , including business, professional, commission, fishing and net income from roomers and boarders	3	
4. <b>Interest</b> on bank accounts and other deposits, savings certificates, Canada Savings Bonds and other bonds	4	
5. <b>Dividends</b> (taxable amount)	5	
6. <b>Taxable Capital Gains</b>	6	
7. <b>Other investment income</b> , including net rental income, etc.	7	
8. <b>Child Tax Benefit</b> , including Quebec Family Allowance and Allowance for Newborn Children	8	
9. <b>Old Age Security Pension, Guaranteed Income Supplement, Spouse's Allowance</b> from federal government. Enter provincial supplements in item 12.	9	
10. <b>Canada or Quebec Pension Plan benefits</b>	10	
11. <b>Unemployment Insurance benefits</b> (before deductions or repayments)	11	
12. <b>Social Assistance and Provincial Income Supplements</b>	12	
13. <b>Workers' Compensation benefits</b>	13	
14. <b>Goods and Services Tax Credit</b> (total of all cheques received in 1994)	14	
15. <b>Provincial Tax Credits</b> , including Quebec Real Estate Tax Refund	15	
16. <b>Veterans' Pensions and Civilian War Pensions and Allowances</b>	16	
17. <b>Other income from government sources</b> <i>Specify</i> _____	17	
18. <b>Retirement Pensions, superannuation and annuities</b> (excluding RRSP)	18	
19. <b>RRSP annuities received and RRIF withdrawals</b>	19	
20. <b>RRSP withdrawals</b> from unmatured RRSPs	20	
21. <b>Alimony, separation allowance, child support</b>	21	
22. <b>Money</b> from persons outside this household to help with living expenses.	22	
23. <b>Other money income</b> including commissions, tips, 24. retiring allowances, severance pay, scholarships, life 25. insurance settlements, lottery winnings, inheritances, income from outside Canada, etc. <i>Please specify all sources.</i>	23	
<i>23 Specify</i> _____		
<i>24 Specify</i> _____	24	
<i>25 Specify</i> _____	25	
<b>What was your Income Tax on 1994 Income?</b> (federal plus provincial)		

Thank you for your cooperation



APPENDIX B

DEBRIEFING QUESTIONNAIRE USED  
FOR MAY 1995 INCOME INTERVIEW



**Survey of Labour and Income Dynamics  
INCOME INTERVIEW - May 1995**

**Interviewer debriefing**

***Part I: The Application***

Q1. How did the respondents react to the question of getting their information directly from the tax files?

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Q1A. What were the reasons for those who did not give permission?

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Q2. Did you have a problem correcting an income amount when you made a keying error?

- 9Yes
- 9No

If yes, please explain \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Q3. Did the "Running Total" help you correct keying errors as they happened?

- 9Yes
- 9No

Q4. A list of income sources appears when you enter an amount in "other income" (INC-Q17, 23, 24, 25). Did you find the list useful?

- 9Yes
- 9No

Q5. In the 1994 respondents were asked to calculate their total income. In 1995, total income is automatically calculated by the application, what is your opinion on this new feature?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Q6. Did you use paper and pencil to calculate amounts during the interview?

9 Yes

9 No

If yes, was there a reason you didn't use the options under F3 to do the calculations?

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**Part II: Edit messages**

Q7. An edit message appears when a person has not reported any amounts, "Can you give me an estimate on total income." If 'no' is chosen a list pops up,

Q7A. Was this list complete?

9Yes

9No

If no, what was missing?

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Q7B. Was the list easy to understand?

9Yes

9No

If no, please specify \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Q7C. Did the respondent often say 'yes' to this edit?

9Yes

9No

Q8. Did the edit messages appear too often?

9Yes

9No

If yes, which one bothered you the most?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Q9. Did you know how to handle the edit messages that appeared?

9Yes

9No

If no, which edit was the most problematic and how did you solve the problem?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Q10. If you did not enter an amount in OAS/GIS - Spouse All and the respondent was 65 years old or over an edit message would pop up. "Normally persons age 65 or over receive this type of income. Did we miss it?"

Q10A. Did you find this message useful?

9Yes

9No

If no, why not?

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Q10B. Was this message confusing to respondents?

9Yes

9No

**Part III: The income form**

Q11. Were the two options (ie to give permission to use the tax file or complete an interview) presented clearly on the form?

9Yes

9No

If no, please specify\_\_\_\_\_

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Q12. Were the instructions clear on the form?

9Yes

9No

If no, please specify \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Part IV: The Newsletter**

Q13. What was your overall impression of the newsletter?

Please include comments on such things as was the newsletter friendly, was the language simple, was it motivational, was it informative, etc...

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Q13A. What was the respondent's reaction?

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**Part V: Manuals**

Q14. Did you find the questions and answers useful?

- 9Yes
- 9No

If no, what could make them useful to you?

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Q15. More information on pension income and disability income was included in the interviewer's manual. Did you find this information useful?

- 9Yes
- 9No

If no, why not? \_\_\_\_\_

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***Part VI: other comments***

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## APPENDIX C

### SUMMARY TO DEBRIEFING QUESTIONNAIRE



## SUMMARY OF SLID INTERVIEWER DEBRIEFING QUESTIONNAIRES

### CANADA

QUESTION #	YES	NO	N/A	%	%
				YES	NO
Question 2	3	61	1	4.62	93.85
Question 3	50	12	3	76.92	18.46
Question 4	58	5	2	89.23	7.69
Question 6	22	43	0	33.85	66.15
Question 7A	54	2	9	83.08	3.08
Question 7B	54	1	10	83.08	1.54
Question 7C	28	23	14	43.08	35.38
Question 8	3	58	4	4.62	89.23
Question 9	60	1	4	92.31	1.54
Question 10A	53	6	6	81.54	9.23
Question 10B	3	57	5	4.62	87.69
Question 11	52	9	4	80.00	13.85
Question 12	56	6	3	86.15	9.23
Question 14	64	0	1	98.46	0.00
Question 15	59	2	4	90.77	3.08

\* Table calculated based on 65 questionnaires, total of all regional offices

N/A = Questions which were not answered, situations not encountered by interviewer.

**SUMMARY OF SLID INTERVIEWER DEBRIEFING  
QUESTIONNAIRES**

ATLANTIC

<b>QUESTION #</b>	<b>YES</b>	<b>NO</b>	<b>N/A</b>	<b>% YES</b>	<b>% NO</b>
Question 2	0	12	1	0	92
Question 3	9	2	2	69.2	15
Question 4	12	0	1	92.3	0
Question 6	4	9	0	30.8	69
Question 7A	10	0	3	76.9	0
Question 7B	10	0	3	76.9	0
Question 7C	5	4	4	38.5	31
Question 8	0	11	2	0	85
Question 9	11	0	2	84.6	0
Question 10A	10	0	3	76.9	0
Question 10B	0	11	2	0	85
Question 11	9	4	0	69.2	31
Question 12	11	1	1	84.6	7.7
Question 14	12	0	1	92.3	0
Question 15	12	0	1	92.3	0

\* Table calculated based on 13 questionnaires

N/A = Questions which were not answered, situations not encountered by interviewer.

**SUMMARY OF SLID INTERVIEWER DEBRIEFING  
QUESTIONNAIRES**

MONTREAL

<b>QUESTION #</b>	<b>YES</b>	<b>NO</b>	<b>N/A</b>	<b>% YES</b>	<b>% NO</b>
Question 2	0	11	0	0	100
Question 3	11	0	0	100	0
Question 4	10	1	0	90.9	9.091
Question 6	5	6	0	45.5	54.55
Question 7A	8	1	2	72.7	9.091
Question 7B	9	0	2	81.8	0
Question 7C	5	4	2	45.5	36.36
Question 8	0	11	0	0	100
Question 9	11	0	0	100	0
Question 10A	9	1	1	81.8	9.091
Question 10B	0	11	0	0	100
Question 11	9	2	0	81.8	18.18
Question 12	10	1	0	90.9	9.091
Question 14	11	0	0	100	0
Question 15	9	0	2	81.8	0

\* Table calculated based on 11 questionnaires

N/A = Questions which were not answered, situations not encountered by interviewer.

**SUMMARY OF SLID INTERVIEWER DEBRIEFING  
QUESTIONNAIRES**

**STURGEON FALLS**

<b>QUESTION #</b>	<b>YES</b>	<b>NO</b>	<b>N/A</b>	<b>% YES</b>	<b>% NO</b>
Question 2	0	5	0	0	100
Question 3	2	2	1	40	40
Question 4	5	0	0	100	0
Question 6	2	3	0	40	60
Question 7A	4	0	1	80	0
Question 7B	4	0	1	80	0
Question 7C	1	3	1	20	60
Question 8	0	5	0	0	100
Question 9	5	0	0	100	0
Question 10A	5	0	0	100	0
Question 10B	0	5	0	0	100
Question 11	4	0	1	80	0
Question 12	3	1	1	60	20
Question 14	5	0	0	100	0
Question 15	5	0	0	100	0

\* Table calculated based on 5 questionnaires

N/A = Questions which were not answered, situations not encountered by interviewer.

**SUMMARY OF SLID INTERVIEWER DEBRIEFING  
QUESTIONNAIRES**

TORONTO

<b>QUESTION #</b>	<b>YES</b>	<b>NO</b>	<b>N/A</b>	<b>% YES</b>	<b>% NO</b>
Question 2	3	16	0	15.8	84.2
Question 3	16	3	0	84.2	15.8
Question 4	17	1	1	89.5	5.26
Question 6	8	11	0	42.1	57.9
Question 7A	15	1	3	78.9	5.26
Question 7B	14	1	4	73.7	5.26
Question 7C	10	5	4	52.6	26.3
Question 8	1	17	1	5.26	89.5
Question 9	16	1	2	84.2	5.26
Question 10A	15	2	2	78.9	10.5
Question 10B	2	15	2	10.5	78.9
Question 11	16	2	1	84.2	10.5
Question 12	18	1	0	94.7	5.26
Question 14	19	0	0	100	0
Question 15	18	1	0	94.7	5.26

\* Table calculated based on 19 questionnaires

N/A = Questions which were not answered, situations not encountered by interviewer.



**SUMMARY OF SLID INTERVIEWER DEBRIEFING  
QUESTIONNAIRES**

EDMONTON

<b>QUESTION #</b>	<b>YES</b>	<b>NO</b>	<b>N/A</b>	<b>% YES</b>	<b>% NO</b>
Question 2	0	13	0	0	100
Question 3	9	4	0	69.2	30.8
Question 4	10	3	0	76.9	23.1
Question 6	2	11	0	15.4	84.6
Question 7A	13	0	0	100	0
Question 7B	13	0	0	100	0
Question 7C	7	4	2	53.8	30.8
Question 8	2	10	1	15.4	76.9
Question 9	13	0	0	100	0
Question 10A	10	3	0	76.9	23.1
Question 10B	0	12	1	0	92.3
Question 11	10	1	2	76.9	7.69
Question 12	10	2	1	76.9	15.4
Question 14	13	0	0	100	0
Question 15	11	1	1	84.6	7.69

\* Table calculated based on 13 questionnaires

N/A = Questions which were not answered, situations not encountered by interviewer.

## SUMMARY OF SLID INTERVIEWER DEBRIEFING

### VANCOUVER

QUESTION #	YES	NO	N/A	% YES	% NO
Question 2	0	4	0	0	100
Question 3	3	1	0	75	25
Question 4	4	0	0	100	0
Question 6	1	3	0	25	75
Question 7A	4	0	0	100	0
Question 7B	4	0	0	100	0
Question 7C	0	3	1	0	75
Question 8	0	4	0	0	100
Question 9	4	0	0	100	0
Question 10A	4	0	0	100	0
Question 10B	1	3	0	25	75
Question 11	4	0	0	100	0
Question 12	4	0	0	100	0
Question 14	4	0	0	100	0
Question 15	4	0	0	100	0

\* Table calculated based on 4 questionnaires

N/A = Questions which were not answered, situations not encountered by interviewer.