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**QUESTIONNAIRE AND COLLECTION PROCEDURES  
FOR SLID INCOME DATA COLLECTION - MAY 1996**

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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 1996 for the third consecutive year, the Survey of Labour and Income Dynamics (SLID) collected data on income from its first panel. Respondents have the option of answering income questions in an interview, or of giving permission to Statistics Canada to allow SLID to use the information on their income tax return. By May 1996, about 71 % of eligible persons, in 63 % of the households had given permission for SLID to access their Revenue Canada tax files. This left about 6,300 households that were contacted for the May income interview.

This paper describes the collection method and content of the 1996 income interview.



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## 1. INTRODUCTION

In May 1996, the Survey of Labour Income and Dynamics collected data on income for the third consecutive year. Respondents have the option of answering the questions on income in an interview, or giving permission to Statistics Canada to allow SLID to use the information on their income tax return. By May 1996, about 71 % of persons, in 63 % of the households had given permission for SLID to access their Revenue Canada tax files. This left 6,300 households that were contacted for an income interview. This research paper describes the data collection procedures and the wording for the May income interview.

As part of the May collection procedures, contact questions are asked and household composition updated. SLID collects demographic information for all longitudinal persons (those who lived in selected households when the panel was chosen) and those who live with longitudinal persons (cohabitants). Income information is collected in May for the previous reference year. The 1996 income interview was conducted only for persons aged 16 or over on January 1, 1996. Cohabitants identified in the January interview (new members in January 1996) were questioned about their 1995 income (if they were 16 or over). New cohabitants who were identified during the May interview will be questioned about their income in 1997 (for reference year 1996).

There were minor changes from January to the questions on the contact and demographic portion of the interview. Dwelling type and tenure are not asked in May. The questions on respondents' demographic characteristics (sex, date of birth, and marital status), and relationships were asked only of new cohabitants or people for whom this information was missing. To obtain more details on this part of the interview, refer to SLID Research Paper 96-01: *SLID Questionnaire for Demographics and Contact: 1996*. The documents that describe the collection procedures and questions for the other components of the January interview are:

96-03 *SLID Labour Interview Questionnaire - January 1996*

96-02 *1996 Preliminary Interview Questionnaire*

## **2. HOW TO READ THIS DOCUMENT**

Question number: For each section, the question number refers to the actual number that is used in the software and appears on the interviewer's computer screen.

Pre-fill items: These are items specific to each interview. The software adds the relevant information into the question, making the interviewer's job easier.

[respondent] - This is the first and last name of the person to whom the question refers. This is not necessarily the person who is talking to the interviewer.

Functions: The interviewers have a number of function keys on the computer which provide them with the following options:

Help - provides instructions related to the question on the screen or the specific income source.

Lang. - enables the interviewer to change the questions on the screen from English to French or vice versa.

Income F3 Options - gives the interviewer access to a list of other functions or information.(a specific set of options available in the income interview)

**Calculator** - enables the interviewer to make calculations on the computer. The result is transferred to the amounts column.

**View - complete questionnaire** - provides access to the questionnaire for the other family members.



**View - current item** - provides access to a specific source for all other household members who have already responded.

**Calculate weeks** - enables the interviewer to calculate the number of weeks during which the respondent could receive unemployment insurance benefits, for example, and then multiply this number by the amount received each week.

**Demographic variables** - provides the name and demographic characteristics of each household member.

Comment (F4) - gives the interviewer the opportunity to add information in a note for that question. These comments are used during data processing.

Refusal (F5) - allows the interviewer to indicate that the respondent refuses to answer the question. This answer is shown in this paper as R.

Don't know (F6) - allows the interviewer to indicate that the respondent does not know the answer to the question. This answer is shown in this paper as DK.

PrevQ (F7) - takes you back to the previous question.

Qlist (F8) - displays all the questions completed so far in this part of the interview.

Forward (F9) - fast forward to the current question from an earlier question viewed by Qlist.

End (F10) - allows the interviewer to interrupt or terminate the interview.

### **3. DATA COLLECTION METHOD**

The data were collected by decentralized computer-assisted interviewing (CAI) mainly by telephone from interviewers' homes. The households surveyed received a newsletter in April that included a regional director's letter that provided information on the special value of longitudinal information and a reminder that respondents have the choice of an interview or of giving permission to access their

tax records. Several pages in the newsletter provided information on the income sources on which data would be collected as well as instructions on how to report the amounts if respondents decided to be interviewed. Since it is easier to answer the questions on income by referring the income tax return, the text showed the 1995 tax form line numbers. For those who wished to prepare for the interview in advance, there was space for three household members to jot down their income figures. This was a change in procedures from the previous years when the income package included a personalized income form for each eligible person in the household with a list of sources and instructions to complete the form. The change was made to reduce costs as there is no clear evidence whether including individual income forms in advance improves data quality or is counterproductive because some respondents find the package intimidating.

During the collection period (May 1996), interviewers contacted the households eligible for the income survey. These were households where one or more member had not been asked the permission question, had refused or reported they did not file a tax return. To reduce respondent burden, the household was not contacted if the only member who had not given permission was a member aged 16 or 17. Results from the previous year showed most of this age group had no income. The May sample consisted of about 6,300 households out of the total SLID 1996 sample of 17,000 households.

For two previous collections, about 15 % of these households had not been traced or were deemed ineligible so their members had never been asked the tax permission question.

The 1995 income questions had very few changes from the content of the previous interviews that were developed jointly with the Survey of Consumer Finances (SCF) team. The main difference from SCF is that for both 1994 and 1995 reference years, respondents were not asked to report total income on the

form/newsletter. Since interviews are computer-assisted, and the computer performs the addition, a decision was made not to ask respondents to perform the calculations themselves.

## **4. THE INCOME INTERVIEW**

### **4.1 OVERVIEW**

Statistics Canada interviewers contacted each household eligible for an income interview. Some of these households had a mixture of respondents who had previously given or refused permission. Income information was not collected for the members who had given permission previously or did so during the May 1996 contact.

Within households, interviewers asked members who refused permission or did not file a tax return about their sources of income. If possible, the information for all eligible members was collected during the same telephone conversation. If a member of the household wished to answer for himself, the interviewer could collect the information separately or make an appointment to call back. If respondents gave permission for Statistics Canada to access their tax returns, the interview ended for that person.

When respondents were interviewed, some edits were programmed to eliminate serious input errors such as typing an additional zero in an amount or the failure to enter the decimal point for cents. The information collected in the January labour survey was also used, to remind respondents that they had reported being employed or receiving unemployment insurance, social assistance or workers' compensation.

## 4.2 INCOME QUESTIONS

Before asking the first question of the income component a list displayed the names of members eligible for income. (The name of members who have given permission was not displayed ). The interviewer selected the person for whom the information on income would be collected and the first question allowed us to determine whether the interview was given by a proxy or whether the person on whom the information was collected spoke directly with the interviewer.

### INC\_Q1

**Interviewer: Select the person you are talking to.**

Go to INC-Q2

A list of all members in the household appears on the screen. The people in the household at the time of the previous interview who had since moved for whatever reason, (deceased, moved, divorced or separated), were identified by the notation N/A (not applicable) next to their name. Interviewers could not select these people as respondents to the interview for other members of the household. The people who had joined the household in May were also included on this list. If the person answering the questions did not belong to the household (child care worker, for example), the interviewer pressed F6 (don't know).

It was not important to know who had answered for the other members of the household, only whether the interview had been given by a proxy.

### INC-Q2:

**Interviewer: In January respondent <prefill of value> .**

**Does <respondent> volunteer permission for SLID to use his/her tax records for income data?**

**Prefills were:**



- 5- Dividends (taxable amount)
- 6- Taxable capital gains . . . net capital gains
- 7- Other investment income, including net rental income, etc.
- 8- Child Tax Benefit, including Quebec Family Allowance and Allowance for Newborn Children
- 9- Old Age Security Pension, Guaranteed Income Supplement, Spouse's Allowance from federal government only
- 10- Canada or Quebec Pension Plan benefits
- 11- Unemployment Insurance benefits (before deductions)
- 12- Social Assistance and Provincial Income Supplements
- 13- Workers' Compensation benefits
- 14- Goods and Services Tax Credit (total of all cheques received in 1994)
- 15- Provincial tax credits, including Quebec Real Estate Tax Refund
- 16- Veterans' Pensions and Civilian War Pensions and Allowances
- 17- Other income from government sources - Specify
- 18- Retirement pensions, superannuation and annuities (excluding RRSP)
- 19- RRSP annuities received and RRIF withdrawals
- 20- RRSP withdrawals from unmatured RRSPs
- 21- Alimony, separation allowance, child support
- 22- Money from persons outside this household to help with living expenses
- 23-25 Other money income - Specify source and give amount of any other money received, including severance pay, retiring allowances, wage loss replacement benefits, employer or union supplementary unemployment benefits for lost earnings, interest from loans or mortgages, lottery winnings and inheritances.

Total 1995 income

1995 income tax (federal plus provincial)

If the newsletter had been filled out, each item in question INC\_Q3 did not have to be asked except the confirmation of total income and the amount of total income tax paid. If there was no advance preparation, the interviewer usually suggested the respondent refer to tax forms and report the items entered there. Otherwise she had to ask whether income had been received from each source.

Question INC\_Q3 was presented on two screens. (See figure) The interviewer could easily switch from screen to screen. The top of the screen displayed the respondent's name and a long description of the income sources. In the left portion of the screen, items 1 to 14 (with a short wording) appeared on the first screen and items 15 to 25 as well as total income and tax paid appeared on the second screen. In the right portion of the screen, there was a message window containing the name of the person to whom the interviewer was speaking and the cumulative total of amounts already reported. All error messages appeared in this window as well as the calculator(F3) and the text from the help function (<F1>) for each item. The figure on the next page shows the screen as if the interviewer entered an amount triggering a range edit for Child tax credit.

For questions 17, 23, 24 and 25, the respondent had to specify the source of income. Even if the respondent did not know the amount or refused to give the amount received, the interviewer asked him to specify the source of this income. When the interviewer entered an amount for one of these items, a list of possible sources appeared. The interviewer simply had to select one of the sources or type in the answer if it did not appear on the list. This feature which was added in May 1995, helped the interview progress more quickly, reduced typing mistakes, and made fewer responses that needed coding during processing.

Figure: Example of screens

INC_Q3											
STEVEN NELLIGAN											
... CHILD TAX BENEFIT INCLUDING QUEBEC FAMILY ALLOWANCE AND											
QUEBEC ALLOWANCE FOR NEWBORN CHILDREN											
1. Wages and salaries				25000.00	<b>Message Centre</b>  Interviewer: This amount appears to be rather unusual. Are you sure? Press <Enter> to confirm or enter a new value.  RUNNING TOTAL = 25600.00  Person being spoken to: IRENE NELLIGAN						
2. Farm self-employment				00.00							
3. Non-farm self-empl				00.00							
4. Interest				450.00							
5. Dividends				00.00							
6. Taxable capital gains				00.00							
7. Other investment income				00.00							
8. Child tax benefit				150.00							
9. OAS, GIS, Spouse's				00.00							
10. CPP or QPP				00.00							
11. Unemployment				00.00							
12. Social Assist				00.00							
13. Workers' Comp				00.00							
14. GST Credit				00.00							
F1	F2	F3	F4	F5	F6	F7	F9	F10	F12		
Help	Language	Opt	Comment	Refuse	Dknow	PrevQ	Fast Fwd	Exit	Continue		



The list for other income from government sources (item 17) is the following:

- NCARP/COD moratorium/TAGS
- Training allowance from federal or provincial governments
- Cash property tax reductions and rebates
- Payments under the Quebec Program for Older Worker Adjustment (POWA)
- Regular payments from provincial automobile insurance plans
- Quebec Maternity Allowance
- Don't know / refuses to give sources
- Other (specify)

The list for other money income (items 23, 24 and 25) is the following:

- Scholarships, bursaries, fellowships, research grants
- Settlements of life or other insurance policies
- Retiring allowance and severance pay from employer
- Income from outside Canada
- Lottery and gambling winnings
- Wage loss replacement benefits and income maintenance payments
- Inheritance
- Employer or union supplementary unemployment benefits
- Payments from Children's Aid
- Interest from loans and mortgages
- Regular income from an estate or trust fund
- Don't know or refuses to give source
- Other (specify)

There was also a final question about the name of a contact person only for the household members who were interviewed about their income . This was designed

to facilitate the tracking of respondents if the interviewer had difficulty reaching the respondent for the next interview in January 1997.

**END\_INC\_Q1**

**THIS INTERVIEW IS PART OF A LONGER-TERM STUDY. WE WILL NEED TO CALL AGAIN NEXT YEAR.**

Interviewer: Press <Enter> to continue.

If no name had been previously collected, the following question appeared:

**END\_INC\_Q2**

**IN CASE OF DIFFICULTIES IN REACHING [respondent], WE WOULD LIKE THE NAME OF A FRIEND OR RELATIVE WE COULD CALL. THIS WOULD ONLY BE USED TO HELP US MAKE CONTACT WITH [respondent].**

Enter/Verify contact name (first and last)

Enter/verify contact person's...

City/Telephone number

If the name of a contact person had been previously collected, the following question appeared:

**END\_INC\_Q3**

**IN A PREVIOUS INTERVIEW, WE COLLECTED THE NAME OF A FRIEND OR RELATIVE OF [respondent] IN CASE THERE WERE ANY DIFFICULTIES IN REACHING HIM/HER. I WOULD LIKE TO VERIFY THAT THIS INFORMATION IS UP-TO-DATE.**

Enter/verify contact name ( first and last)

Enter/verify contact person's ...

City/Telephone number

These last two screens enabled the interviewer to enter the name, city and telephone number of a contact person or to verify this information for respondents who had previously provided a name (The information collected appeared in the screen.)

### **4.3 EDITS**

Five types of edits were used during data collection. Their purpose was to clean up the data during the interview. In some cases, the edits served to correct the amount the interviewer had entered in the computer. In other cases, they verified the consistency of the data between the January and May interviews.

#### **4.3.1 Amount check**

The first type of edit consisted of checking the amount entered by the interviewer. The edit range was soft, meaning that the interviewer could leave the amount as entered. When the amounts entered in the computer were outside the predetermined range, an error message for the interviewer popped up. The message was worded as follows: "This amount appears to be rather unusual. Are you sure?". The ranges shown below were determined using data collected in previous years' SLID income interviews). The ranges exclude approximately 5% of amounts below or above the selected limits:

	<b>Description</b>	<b>Minimum</b>	<b>Maximum</b>
1	Wages and salaries	1,000	100,000
2	Farm self-employment net income	-5,000	100,000
3	Non-farm self-employment net income	-5,000	150,000
4	Interest	25	50,000
5	Dividends	10	50,000
6	Taxable capital gains	10	100,000
7	Other investment income	-1,000	50,000
8	Child Tax Benefit	200	4,500
9	Old Age Security Pension, Guaranteed Income Supplement, Spouse's Allowance	2,300	12,000
10	Canada or Quebec Pension Plan benefits	500	15,000
11	Unemployment Insurance benefits	500	23,000
12	Social Assistance and Provincial Income Supplements	300	25,000
13	Workers' Compensation benefits	200	50,000
14	Goods and Services Tax Credit	100	1,500
15	Provincial tax credits	25	3,000
16	Veterans' Pensions and Civilian War Pensions and Allowances	300	50,000
17	Other income from government sources	100	25,000
18	Retirement pensions, superannuation and annuities	500	50,000
19	RRSP annuities received and RRIF withdrawals	100	50,000
20	RRSP withdrawals	500	20,000
21	Alimony, separation allowance, child support	800	25,000

	<b>Description</b>	<b>Minimum</b>	<b>Maximum</b>
22	Money from persons outside the household	500	15,000
23	Other money income	10	25,000
24	Other money income	10	25,000
25	Other money income	10	25,000
26	Total income (see 4.3.3)		150,000
27	Income tax (see 4.3.4)		75,000

#### **4.3.2 Comparison with information collected in January**

The second type of edit was a comparison of the information collected during the January 1996 labour interview with the information collected in May 1996.

Information collected in January indicated that the respondent had received amounts from one of the sources mentioned and should report income in May.

If no amount was reported for wages and salaries, unemployment insurance benefits, workers' compensation benefits or social assistance but the respondent had reported receiving such income in January, the following error messages appeared:

By reminding the respondent that he/she had reported receiving unemployment insurance benefits, for example, during the previous interview the interviewer increased the probability that the respondent would report an amount.

**'Based on our January interview, we expected an amount for [type of income]. Did we miss it?'**

### **4.3.3 Old Age Security Pension, Guaranteed Income Supplement, Spouse's Allowance**

Error messages related to these sources of income were programmed based on the respondents' age. If the person was 65 and over and did not report OAS, the message said:

**‘Normally persons aged 65 or over receive this type of income. Did we miss it?’**

Another error message (for the interviewer) popped up when a respondent under the age of 60 reported an amount for item 9 (Old Age Security Pension, Guaranteed Income Supplement or Spouse's Allowance). The message was worded as follows:

**‘Interviewer: Normally this type of income is paid only to persons aged 60 or over. Could this be income from another source?’**

### **4.3.4 Total income check**

The fourth type of check related to total income. This check verified the amounts entered by the interviewer.

#### **1- If the respondent reported at least one amount**

The computer calculated a total and the interviewer asked the respondent whether the amount seemed correct. The message was worded as follows:

**‘Based on the amounts reported, the computer has calculated the total income as [total income as calculated ]. Does this sound about right?’**

The interviewer must enter “Yes” or “No”.

- a) If the interviewer entered “Yes”, the calculated amount is transferred to the “Total income” line.
- b) If the interviewer entered “No”, the following message appeared:  
**‘Perhaps I made a mistake entering the numbers. Could we review them?’**

The interviewer could revise the amounts, enter a new amount in total income or press F5 (refusal) or F6 (don’t know).

**2. If the respondent had answered “don’t know” or refused to state the amount for a source of income**

In this situation, if the respondent reported a total income greater than the total income calculated by the computer, a second message for the interviewer only, appeared under the earlier message, worded as follows:

Interviewer: “Note that the total the respondent has reported may include values for refusals and “don’t knows”.”

**3- If the respondent answered “do not know” or refused to answer any items or reported no income for all items,**

The following message appeared, intended for the respondent:  
**‘Can you give an estimate of total income?’**

The interviewer must enter “Yes” or “No”.

- a) If the respondent gives an estimate, the interviewer enters the amount in the “Total income” line.

- b) If the interviewer enters “No”, the following list appears and the interviewer chooses the appropriate option:
- C No income reported but income received in 1995
  - C No income in 1995
  - C Don't know if respondent received income or not in 1995
  - C Respondent refuses to give income information.

#### **4.3.5 Edit of amount of income tax reported**

It is difficult to calculate the amount of tax paid when a respondent does not give any indication. The deductions to which respondents are entitled are very difficult to estimate. It is therefore important to question the respondent when he/she does not report the amount of income tax paid. When the respondent had reported total income greater than or equal to \$25,000 and had not given an amount for item 27 (tax paid), the interviewer asked the respondent if he/she had forgotten to report tax paid. A different message popped up if the amount of tax reported was more than 50% of the total income reported. The messages were worded as follows:

**‘[Respondent] reported a total income of XXX \$ and has not reported an amount for income tax. Did we forget it?’**

or

**‘The amount reported for income tax is rather high compared to your total income. I entered \$XXX.. DID I GET IT RIGHT?’**



## APPENDIX 1

### RESPONDENT NEWSLETTER

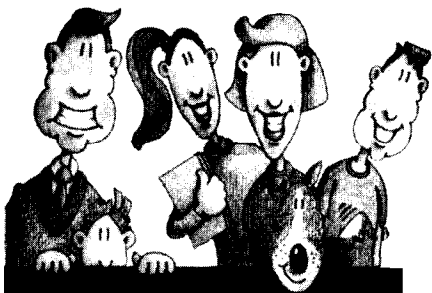


SURVEY OF

Labour

AND

Income  
Dynamics



## NEWSLETTER

*On behalf of Statistics Canada, I would like to thank you once again for your participation in the Survey of Labour and Income Dynamics. The information you provide becomes even more valuable every year that we interview you.*

*Some respondents have asked why SLID interviews the same people several years in a row. There is a good reason. Our lives change and by talking to the same people over time the survey shows these changes.*

*How are families and individuals coping? What happens to the family when a breadwinner loses his or her job? How long does it take to find another job? Is it as good as the last job? Financially what are the effects of getting married, separating or retiring? By knowing these sorts of "dynamics", we can learn hard facts about a lot of issues. Here are a few:*

- ✓ *the long-term results of job loss*
- ✓ *the transition from being a student to finding a job*
- ✓ *how many people experience long-term poverty, and why*
- ✓ *the role of major government programs in supporting families and helping people get through difficult times*

*To find out such things, we have to interview people from all walks of life over several years to get a long-term picture. That's what makes SLID unique.*

*For this part of the survey, an interviewer from Statistics Canada will contact your household early in May to ask income questions.*

*Again, thank you for your participation.*

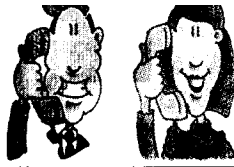
*Director, Quebec Region  
Statistics Canada*



Statistics  
Canada

Statistique  
Canada

Canada



## **Who uses the SLID data?**

People who represent you in government and other organizations use it to develop policies and programs. Journalists use the data to inform us about our society. Results from the survey ensure that we are all better informed. As society becomes more complex, information from SLID becomes more essential.

## **Every year, your information is important.**

Although the questions are the same every year, your answers may change depending on your circumstances. In a longitudinal survey like SLID, we compare the information that you and other respondents report this year to your situation last year and the year before that, to find out what patterns tend to occur between work, income, and even changes in your family situation. It is likely that many other people share experiences like yours.

## **It's confidential!**

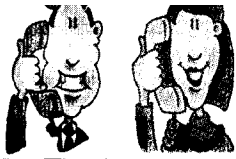


We realize that confidentiality is a big concern for you. We want to assure you that your information is always safe with Statistics Canada. No one will ever identify you or your family from the data. Any information that could identify you out of the whole Canadian population is never released to anyone. Our policy on that will never change.



### **SOME RESULTS**

If you would like to receive a brochure on recent findings from SLID, just return the card enclosed with this newsletter.



## **CHOICES**

In the past, we asked about using your tax records in order to obtain your income information. So far, three-quarters of all SLID respondents have given us permission to use their tax data.

You are receiving this newsletter because someone in your household either preferred to be interviewed, or does not file a tax return. These individuals will be contacted in May for their income information. The option of allowing us to access tax records is still available. Should anyone wish to go this route, please inform the interviewer when he/she calls.

### **It's a one way street...**

With your permission, we will obtain your tax record information from Revenue Canada, but they will not be able to get your SLID information. The only information they can get is what is released to the general public.

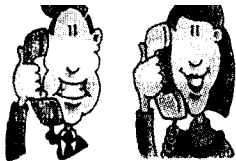
## **TO HELP YOU WITH THE INTERVIEW**



We will ask about 1995 income. On the next pages, we provide information on the income sources we ask about. Most people will have only a few items to report.

If you would like to prepare in advance to speed up the interview there is space provided to jot down your income information. Answer as best you can.

We have also given the 1995 tax form line numbers if you would rather refer to your tax form when the interviewer calls.



**INCOME FROM WORK**

**1 Wages and Salaries** from all jobs before deductions. Include commissions, tips, military pay and allowances.

- *Line 101.*
- *Report retiring allowances, severance pay, wage loss replacement and supplementary unemployment benefits in item 23.*

Name	Name	Name
\$ _____	\$ _____	\$ _____

**2 Farm self-employment net income:** that is gross income less operating expenses, depreciation and capital cost allowances.

- *Line 141.*
- *If partnership, report your share only.*
- *Report rent from farms leased to others in item 7.*
- *If incorporated, report in item 1 and/or 5, as done for tax.*

\$ _____	\$ _____	\$ _____
----------	----------	----------

**3 Non-Farm self-employment net income:** that is gross income less operating expenses, depreciation and capital cost allowances.

- *Lines 135, 137, 139 and 143.*
- *If partnership, report your share only.*
- *Report TAGS in item 17.*
- *If incorporated, report in item 1 and/or 5, as done for tax.*

\$ _____	\$ _____	\$ _____
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**INVESTMENT INCOME**

**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 each person's share separately.*

\$ _____	\$ _____	\$ _____
----------	----------	----------

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

- *Line 120.*

\$ _____	\$ _____	\$ _____
----------	----------	----------

**6 Taxable Capital Gains**

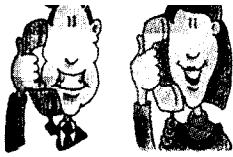
- *Line 127.*

\$ _____	\$ _____	\$ _____
----------	----------	----------

**7 Other investment income** not reported above such as net rents for real estate and leased farm land, etc.

- *Line 126.*

\$ _____	\$ _____	\$ _____
----------	----------	----------



**INCOME FROM  
GOVERNMENT SOURCES**

Name

Name

Name

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

\$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_

**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 Quebec 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 item 23.*

\$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_

**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 plan covering work related in jury or disability.

● *Line 144.*

● *Report benefits from any non-government plans in item 23*

\$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_

**14 Goods & Services Tax Credit:** Report the amount from all GST cheques received in 1995.

\$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_

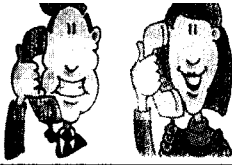
**15 Provincial Tax Credits**

● *Line 479 (and 480 in Alberta).*

**Quebec residents only:**

● *Sum of lines 455, 458 to 461 on Quebec 1995 Income Tax Return.*

\$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_



Name

Name

Name

\_\_\_\_\_

**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 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)
- payments for employees in fishing industry (TAGS)
- Quebec Maternity Allowance

Please specify the source of this income

\$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_

**INCOME FROM PENSIONS, RRSPS, RRIFs**

**18 Retirement pensions, superannuation and annuities, excluding RRSP:** Include survivors' benefits from an employment pension plan and annuity benefits that do not come from a matured RRSP.

- 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 item 23.

\$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_

**19 RRSP annuities 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.

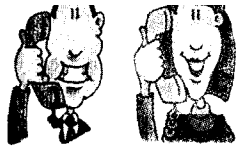
\$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_

**20 RRSP withdrawals:**

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

\$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_





**OTHER INCOME**

Name

Name

Name

**21** Alimony, separation allowance, child support: Include benefits received under a court order or written agreement.

\$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_

● Line 128.

**22** Money, from persons outside this household to help with living expenses.

\$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_

**23** Other income not reported above such as severance pay, retiring allowances, 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.

● 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.

Please specify the source of this income

\_\_\_\_\_

**INCOME TAX**

What was your Income Tax on your 1995 income?

\$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_

Report federal and provincial tax payable on your 1995 income.

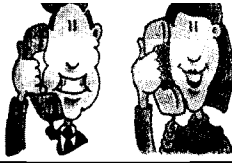
**All provinces except Quebec:**

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

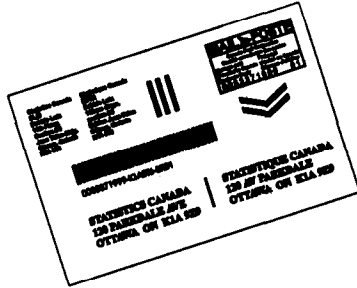
**Quebec residents only:**

● Sum of line 420 from federal tax return and line 450 from the Ministère du Revenu du Québec 1995 Income Tax Return.

● Subtract sum of lines 445 and 446 on the Quebec return.



## KEEPING IN TOUCH



Thanks to all of you who sent your change of address cards. This information is very useful in a longitudinal survey.

We hope you find our newsletter useful. To save money, the newsletter is produced and mailed using the least expensive methods. If you have any comments on this or anything else please return the enclosed card.

If you have any questions about the survey, please ask your interviewer or call your Statistics Canada regional office for more information.

Statistics Canada Regional Office  
North American Life Centre  
1770 Market Street, 3rd Floor  
Halifax, Nova Scotia, B3J 3M3

Local calls:(902) 426-6212  
Toll-free service:1-800-554-6086

Statistics Canada Regional Office  
Guy-Favreau Complex, East Tower  
200 René-Lévesque Blvd. West  
4th Floor  
Montréal, Quebec, H2Z 1X4

Local calls:(514) 283-1011  
Toll-free service:1-800-363-6720

Statistics Canada Regional Office  
Civic Administration Centre  
225 Holditch Street, 2nd Floor  
Sturgeon Falls, Ontario, P0H 2G0

Local calls:(705) 753-4888  
Toll-free service:1-800-461-1662-Ext 230

Statistics Canada Regional Office  
Arthur Meighen Building  
25 St. Clair Avenue East, 10th Floor  
Toronto, Ontario, M4T 1M4

Local calls:(416) 973-6544  
Toll-free service:1-800-387-0714

Statistics Canada Regional Office  
Avord Tower  
9th Floor  
2002 Victoria Avenue  
Regina, Saskatchewan, S4P 0R7

Local calls:(306) 780-6089  
Toll-free service:1-800-263-1136

Statistics Canada Regional Office  
Library Square  
600-300 West Georgia Street  
Vancouver, British Columbia, V6B 6C7

Local calls:(604) 666-3553  
Toll-free service:1-800-663-0172



## APPENDIX 2

ON-LINE HELP (F1)

This appendix provides the text which the interviewers can use to help answer questions from respondents on where certain amounts should be reported.

### **1) Wages and salaries**

from ALL jobs BEFORE ALL deductions

REF: Line 101.

#### INCLUDE

- \*include commissions and tips
- \* earnings from casual work  
with no T4
- \* pay as member of armed forces  
or reserve unit

NOTE: Report retiring allowances,  
severance pay, wage loss  
replacement benefits and employer or  
union suppl. unemployment benefits in  
items 23 to 25.

### **2) Farm self-employment NET income**

REF: Line 141.

#### INCLUDE

- \* farm program payments/rebates
- \* Can. Wheat Board payments
- \* crop insurance

#### EXCLUDE

- \* operating expenses

- \* depreciation allowances
- \* capital cost allowances
- \* value of food and fuel produced  
and consumed on own farm

If partnership, report YOUR SHARE

NOTE: If farm is incorporated,  
report in item 1, and/or item 5  
as done for tax purposes.

Report net rent from  
farms rented out to others in  
item 7.

### **3) Non-farm self-employment**

NET income from unincorporated  
BUSINESS, COMMISSION,  
PROFESSIONAL, FISHING

REF: Lines 135, 137, 139  
and 143.

INCLUDE

- \* gross inc. less expenses from  
roomers and boarders

EXCLUDE

- \* operating expenses
- \* depreciation allowances
- \* capital cost allowances

If partnership, report YOUR SHARE

NOTE: If business is incorporated  
report in item 1, and/or 5,  
as done for tax purposes.

TAGS fishing income compensation  
payments should be reported in  
item 17.

#### **4) Interest**

REF: Line 121.

INCLUDE interest on

- \* deposits
- \* savings
- \* guar. inv. certificates (GICs)
- \* Canada Savings Bonds
- \* other gov. bonds
- \* corporate bonds
- \* mutual funds
- \* Treasury Bills
- \* life insurance policies
- \* interest and dividends from  
OUTSIDE Canada

EXCLUDE the principal.

NOTE: For joint accounts,  
report YOUR SHARE.

#### **5) Dividends**

REF: Line 120.

TAXABLE amount from  
Canadian corporations.

**6) Taxable Capital Gains**

as reported for tax purposes.

REF: Line 127.

**7) Other investment income**

REF: Line 126.

EXAMPLES INCLUDE:

- \* net rental income
- \* rents for leased farm land

**8. Child Tax Benefit**

To be reported by parent who  
receives cheque from federal gov.

INCLUDE

- \* Québec Family Allowances
- \* Québec Allowance for Newborn  
Children

NOTE: Report Manitoba "CRISP"  
payment in item 12.

**9) Old Age Security Pension,**

Guaranteed Income Supplement,  
Spouse's Allowance

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

INCLUDE payments from fed. gov.

\* to persons 65 years and over (OAS/GIS),

\* to eligible persons 60 to 64 old (SPA and extended SPA)

NOTE: Report prov. income supplements in item 12 and/or 17.

## **10) Canada or Québec Pension**

Plan benefits

REF: Line 114.

INCLUDE

\* Retirement Pension

\* Disability Pension including benefits for dependent children

\* Surviving Spouse's Pension

\* Combined Pension (Retirement or Disability, combined with Surviving Spouse's Pension)

\* Orphan's Benefit

NOTE: 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 BEFORE deductions  
or repayments from  
FEDERAL UI program  
REF: Line 119.

INCLUDE benefits for:

- \* job loss
- \* sickness
- \* maternity, paternity, adoption
- \* job creation
- \* work sharing
- \* retraining
- \* benefits to self-employed  
fishermen

NOTE: TAGS fishing income  
compensation payments  
should be reported in item 17.

### **12) Social Assistance and Provincial Income Supplements**

from PROV. or MUNICIPAL programs  
INCLUDE benefits for food, fuel,  
shelter, clothing, special needs  
and work incentive programs.  
REF: Line 145.

## EXAMPLES INCLUDE

### Newfoundland

- \*Income Support Program
- \*Special Age Related Assistance
- \* Social Assistance Program
- \* Child Welfare Program
- \* Day Care Subsidy Program

### Prince Edward Island

- \* Social Assistance
- \* Child Welfare
- \* Assistance for Day Care
- \* Assistance for Residential Care

### Nova Scotia

- \* Family Benefits Program
- \* Municipal Social Assistance  
Program
- \* Maternal Nutritional Allowance
- \* Special Social Assistance (SSA)  
Program (Seniors)
- \* Rental Assistance Program  
(Seniors)

### New Brunswick

- \*Social Assistance
- \*Transitional Assistance Program (TAP)
- \*Extended Benefits Program (EBP)
- \*Fuel Supplement Program
- \* Interim Assistance Program (IA)

- \* Upgrading Training & Placement  
(UT&P)
- \* Income Supplement Benefits
- \* Long Term Established Needs  
Program (LTEN)
- \* Day Care Subsidy

#### Québec

- \* Financial Support Program (FSP)
- \* Work and Employment  
Incentives Program (WEIP)
- \* Parental Wage Assistance  
Program (PWA)
- \* Senior Citizens' Rental  
Assistance Program (LOGIRENTE)

#### Ontario

- \* General Welfare Assistance(GWA)
- \* Family Benefits Program (FBA)
- \* GAINS-A (Seniors)
- \* GAINS-D (for the disabled)
- \* Handicapped Children's Benefits

#### Manitoba

- \* Provincial Social Allowances  
Program
- \* Municipal Assistance Program
- \* Child Related Income Support  
Program (CRISP)
- \* 55 Plus, A Manitoba Income

## Supplement

- \* Shelter Allowances for Elderly Renters (SAFER, SAFFR)
- \* Income Assistance for the Disabled

## Saskatchewan

- \* Family Income Plan (FIP)
- \* Saskatchewan Assistance Plan (SAP)
- \* Saskatchewan Income Plan (SIP) (Seniors)

## Alberta

- \* Supports for Independence (SFI)
- \* Alberta Seniors Benefit (ASB)
- \* Child Welfare
- \* Special Needs Assistance (Seniors)
- \* Assured Income for the Severely Handicapped (AISH)
- \* Services to persons with Disabilities (SPD)

## British Columbia

- \* Income Support Programs (ISP)
- \* Income Assurance (Programs for Independence)
- \* GAIN (for handicapped and seniors 60-64 not receiving OAS and SPA)

\* GAIN (Seniors Supplement)

\* Temporary Assistance 13) Workers' Compensation benefits from any provincial government compensation plan covering work-related injury or disability

REF: Line 144.

NOTE: Report benefits from any non-government plans in items 23 to 25.

#### **14) Goods and Services Tax Credit**

Report amount from ALL GST credit cheques received in 1995 from the federal government.

15) Provincial Tax Credits

All provinces except Quebec:

REF: Line 479 (and 480 in Alberta)

Québec residents only:

REF: Sum of lines 458 to 461 on

Québec 1995 Income Tax Return.

INCLUDE: Real Estate Tax Refund for Forest Producers and Refundable Tax Credit for Adoption Expenses on Québec Income Tax Return.

Not applicable in Saskatchewan.

**16) Veterans' Pensions and  
Civilian War Pensions and  
Allowances from Department  
of Veterans Affairs.**

**INCLUDE**

- \* Disability Pension
- \* Special Allowances  
(Attendance and Clothing All.)
- \* Additional Pension for spouse  
and children
- \* Survivor Benefits (Surviving  
Spouse and Surviving  
Dependants)
- \* Civilian War Pensions and All.
- \* Prisoner-of-War Compensation
- \* Gallantry Awards

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

**17) Other income from gov.**

sources not reported

**INCLUDE**

- \* payments from federal or prov.  
gov. for training programs
- \* property tax reductions and  
rebates
- \* regular payments from prov.  
automobile insurance plans

(exclude lump sum payments)

- \* payments under the Québec Program for Older Worker Adjustment (POWA)
- \* TAGS payments for employees in the fishing industry
- \* Québec Maternity Allowance

**18) Retirement pensions, superannuation and annuities**

REF: T4A-boxes 16 and 24,

T3- box 31 and T5-box 19.

**INCLUDE**

- \* pension income and survivors' benefits from a pension plan of ONE OR MORE employers
- \* pensions of retired civil servants, armed forces personnel and RCMP officers
- \* annuity benefits received from Canadian Government Annuities Fund, an insurance company, etc.

**EXCLUDE**

- \* RRSP annuities
- \* return of contributions from a pension plan

**NOTE:** Report annuities from

matured RRSPs and income from RRIFs in item 19. Report withdrawals from unmatured RRSPs in item 20. Report severance pay and retiring allowances in items 23 to 25.

**19) RRSP annuities received and RRIF withdrawals**

REF: T4RSP-box 16 and T4RIF-boxes 16 and 20.

INCLUDE

- \* annuity receipts (including survivor's benefits) from a matured RRSPs
- \* withdrawals from a RRIFs

**20) RRSP withdrawals**

REF: T4RSP slip - box 22.

INCLUDE

- \* withdrawal of funds from RRSP accounts (unmatured RRSPs)

EXCLUDE

- \* tax-free withdrawals used for purchasing a home

NOTE: Report annuities received from matured RRSPs in item 19.



**21) Alimony, separation allowance, child support**

REF: Line 128.

INCLUDE

- \* benefits under a court order  
or written agreement
- \* received by YOU, or by SOMEONE  
ELSE on your behalf  
to maintain YOU, your CHILDREN,  
or BOTH

**22) MONEY from persons outside  
this household to help with  
living expenses**

EXAMPLES INCLUDE

- \* money for rent and food

EXCLUDE

- \* value of non-cash gifts<sup>23)</sup> Other money income

OTHER CASH inc. not reported

REF: Lines 104 and 130.

EXAMPLES INCLUDE:

- \* retiring allowances and  
severance pay received on  
termination of employment
- \* wage loss replacement benefits
- \* income maintenance payments
- \* supp. unemployment benefits  
from employer or union

- \* payments from Children's Aid
- \* non-refundable scholarships,  
bursaries, fellowships,  
research grants
- \* settlements of life or other  
insurance policies
- \* lottery and gambling winnings
- \* money inherited
- \* income from outside Canada  
(if not already reported)
- \* interest from loans or mortgages
- \* regular income from an estate  
or trust fund
- \* etc.

#### **24) Other money income**

OTHER CASH inc. not reported

REF: Lines 104 and 130.

#### EXAMPLES INCLUDE:

- \* retiring allowances and  
severance pay received on  
termination of employment
- \* wage loss replacement benefits
- \* income maintenance payments
- \* supp. unemployment benefits  
from employer or union
- \* payments from Children's Aid
- \* non-refundable scholarships,  
bursaries, fellowships,

research grants

- \* settlements of life or other insurance policies
- \* lottery and gambling winnings
- \* money inherited
- \* income from outside Canada (if not already reported)
- \* interest from loans or mortgages
- \* regular income from an estate or trust fund
- \* etc. 25) Other money income

OTHER CASH inc. not reported  
REF: Lines 104 and 130.

EXAMPLES INCLUDE:

- \* retiring allowances and severance pay received on termination of employment
- \* wage loss replacement benefits
- \* income maintenance payments
- \* supp. unemployment benefits from employer or union
- \* payments from Children's Aid
- \* non-refundable scholarships, bursaries, fellowships, research grants
- \* settlements of life or other insurance policies
- \* lottery and gambling winnings
- \* money inherited

- \* income from outside Canada  
(if not already reported)
- \* interest from loans or mortgages
- \* regular income from an estate  
or trust fund
- \* etc. 26) Total 1995 income

**27) Income Tax on 1995 income  
FEDERAL and PROV. tax payable  
on 1995 income**

All provinces except Québec:

Sum of line 420 and 428

(or 435 only for form

T1S-A/T1S-B).

Québec residents only:

Sum of line 420 from 1995 federal  
tax return and line 450 from the  
Ministère du Revenu du Québec  
1995 Income Tax Return.

EXCLUDE QPP contributions and  
health tax reported on lines 445  
and 446 of the Québec return.

If they filed their federal return  
using a T1S-A, T1S-B, T1S-C or  
filed electronically, they may not  
have calculated their taxes. They

should report their best estimate of their tax payable (plus Québec tax, if applicable).

If they cannot estimate an amount, indicate whether or not they have a tax payable (enter "DK" if they think they have tax payable but they don't know how much, or "0" if they think it is zero).