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**SLID INCOME INTERVIEW - MAY 1993
QUESTIONNAIRE AND DATA COLLECTION
PROCEDURES**

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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, at no charge. 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 telephone (613) 951-2891, or by fax (613) 951-3253.

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EXECUTIVE SUMMARY

In May 1993, the Survey of Labour and Income Dynamics (SLID) will test the income and wealth portion of the survey content. Since computer-assisted interviewing -- the standard SLID data collection method -- will be used, there is no questionnaire in the traditional sense. Most of the questions are listed in a form mailed ahead of time, encouraging respondents to consult records for the actual answers. The interviewer asks the remaining questions when collecting the data.

The purpose of this document is to provide a description of the data collection procedures and the question wordings, as well as some rationale for the chosen direction.

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1. INTRODUCTION

In May 1993, the Survey of Labour and Income Dynamics (SLID) will test the income and wealth portion of the survey content. Since computer-assisted interviewing -- the standard SLID data collection method -- will be used, there is no questionnaire in the traditional sense. Most of the questions are listed in a form mailed ahead of time, encouraging respondents to consult records for the actual answers. The interviewer asks the remaining questions when collecting the data.

The purpose of this document is to provide a description of the data collection procedures and the question wordings, as well as some rationale for the chosen direction. Other related documents complement this one and also are available as SLID Research Papers:

- ! 92-01B **Content of the Survey of Labour and Income Dynamics: Part B - Income and Wealth Content;**
- ! 93-01 **The Use of Income Tax Data for SLID;**
- ! 92-01A **Content of the Survey of Labour and Income Dynamics: Part A - Demographic and Labour Content;**
- ! 93-02 **SLID Labour Interview: "Questionnaire" January 1993.**

2. DATA COLLECTION APPROACH

Two guiding principles were established relating to the May 1993 test.

Principle A: To the extent possible, data items would correspond directly to those used by Revenue Canada in collecting individual income taxes.

Principle B: Respondents would be sent a list of questions prior to the interview. This would allow them time to prepare their answers using various

reference materials, primarily their 1992 T1 Income Tax form and associated statements and schedules.

Following Principle B, a questionnaire will be mailed in mid-April to all test respondents 16 years of age and over (as of January 1, 1993). This questionnaire, the SLID Notebook, is discussed in greater detail in Section 3. A copy of the Notebook is provided in Appendix 1. Following Principle A, direct reference to the income tax form is made in the Notebook.

The notebook was designed to collect information for an individual. One package will be mailed to each family (not household), containing notebooks preprinted with the name of each eligible respondent. A covering letter will instruct the family to complete the notebooks, then to wait for a telephone call from the interviewer to report the information.

The interviewer will collect the information using a computer-assisted interviewing approach, described in Section 4. The interview includes a section where one person per household will be asked about his or her thoughts and reactions to the SLID Notebook and its questions.

3. SLID NOTEBOOK

The main purpose of the notebook is to provide respondents with the list of data items to be collected, along with instructions on how to report certain items. It is felt that reference to financial documents is necessary for reliable collection of the information. The difficult step for the survey was to determine the "best" method of motivating respondents to actually do the necessary reference work, assuming, of course, that the documents are kept and are available.

As is immediately evident upon examining the Notebook (see Appendix 1), the SLID team decided to design a "non-bureaucratic" look, an attempt to "lighten" the subject matter in the minds of the respondents so that they would be more likely to complete the form prior to the interview.

The respondent's name will be preprinted on the top sheet of paper on the clipboard on the cover. Some brief introductory material and important instructions are given on page 2 of the Notebook and in the first column of page 3.

The 61 questions are then listed in column-format, three columns per page. The question numbers are prominent to guide the flow. Additional information is provided after each question, in a smaller print font. A common survey format is to have a separate questionnaire and guide for respondents. Questionnaire research has indicated that very few people will read a guide, even when they are unsure how to answer a question. The approach adopted for the SLID Notebook is an attempt to "maximize the probability" that a respondent will refer to the additional information.

In certain situations where questions must be viewed as a group, questions 2 to 6 for example, the entire group of questions is lightly shaded.

For those amounts which can be taken directly from income tax statements, references to tax line numbers are given just below and at the right end of the answer box. Respondents may have completed one of four 1992 Canadian Income Tax Forms (T1 General, T1 Special, T1 Short and T1 65Plus). Unfortunately, line numbers are not consistent among the different forms. Appendix 2 provides the correspondence between question numbers in the SLID Notebook and line numbers on each of the four T1 tax forms. The T1 General and T1 Special,

completed by a majority of the population, use identical line numbers. It is these line numbers which are printed on the notebook.

Another unfortunate result of linking SLID directly to the T1 tax forms is that the T1 Short and T1 65Plus are no-calculation forms. Therefore, respondents who completed these forms will not be able to answer the questions on income tax paid (questions 37 to 39) unless they have already received their Notice of Assessment back from Revenue Canada.

The Income and Wealth questionnaire is divided into five major sections:

1. Questions 1 to 35 correspond to sources of income in 1992. Question wording was dictated, in large part, by wording on the tax forms. Question 36 (total income) is included for a number of reasons:
 - ! Some people may wish to add their sources;
 - ! Some people may not be sure of or may not wish to report some sources, but can report a reliable estimated total.
2. Questions 37 to 39 collect information on income taxes paid in 1992.
3. Questions 40 to 42 collect some basic information on Registered Pension Plans.
4. Questions 43 to 58 (excluding items 44 and 46) collect the value of various types of assets owned by the respondent.
5. Items 44, 46, 59, 60, 61 collect information on the respondent's debts.

One problem which has not been adequately resolved (at least in the minds of SLID team members) relates to joint assets. Initially, the team wanted to allow respondents the choice of responding individually, as a family or some combination (i.e., some items reported individually and some reported as a family; or, some family members reporting individually and others reporting as a group). The team was unable to design a form which explained this concept simply. This led to the design of individual forms with instructions to the respondent to report only his/her share of any jointly-held assets. In theory, this is acceptable. However, many problems will likely arise in practice. First, there are issues of perception. A couple may view their house as belonging to the two of them, but may be confused when asked to report their individual shares. That is, it may not be obvious to a respondent that this can be done and how. Another perception problem is which person(s) are in "control" of the asset. Who makes the decisions relating to it? Does joint decision-making imply a half "share" in an asset? Second, there are the legal issues:

- ! Who is registered as the owner?
- ! What would happen according to family law in the event of a separation or divorce?

Another situation which may cause confusion for respondents is when an asset is owned jointly with someone not in the household. In these cases, the total value of the asset would not get reported for SLID. This may seem "wrong" to a respondent, although it is theoretically the correct method. It is hoped that the test will provide some useful information on how to "best" collect information on joint assets.

4. COMPUTER-ASSISTED INTERVIEW

4.1 GENERAL DESCRIPTION

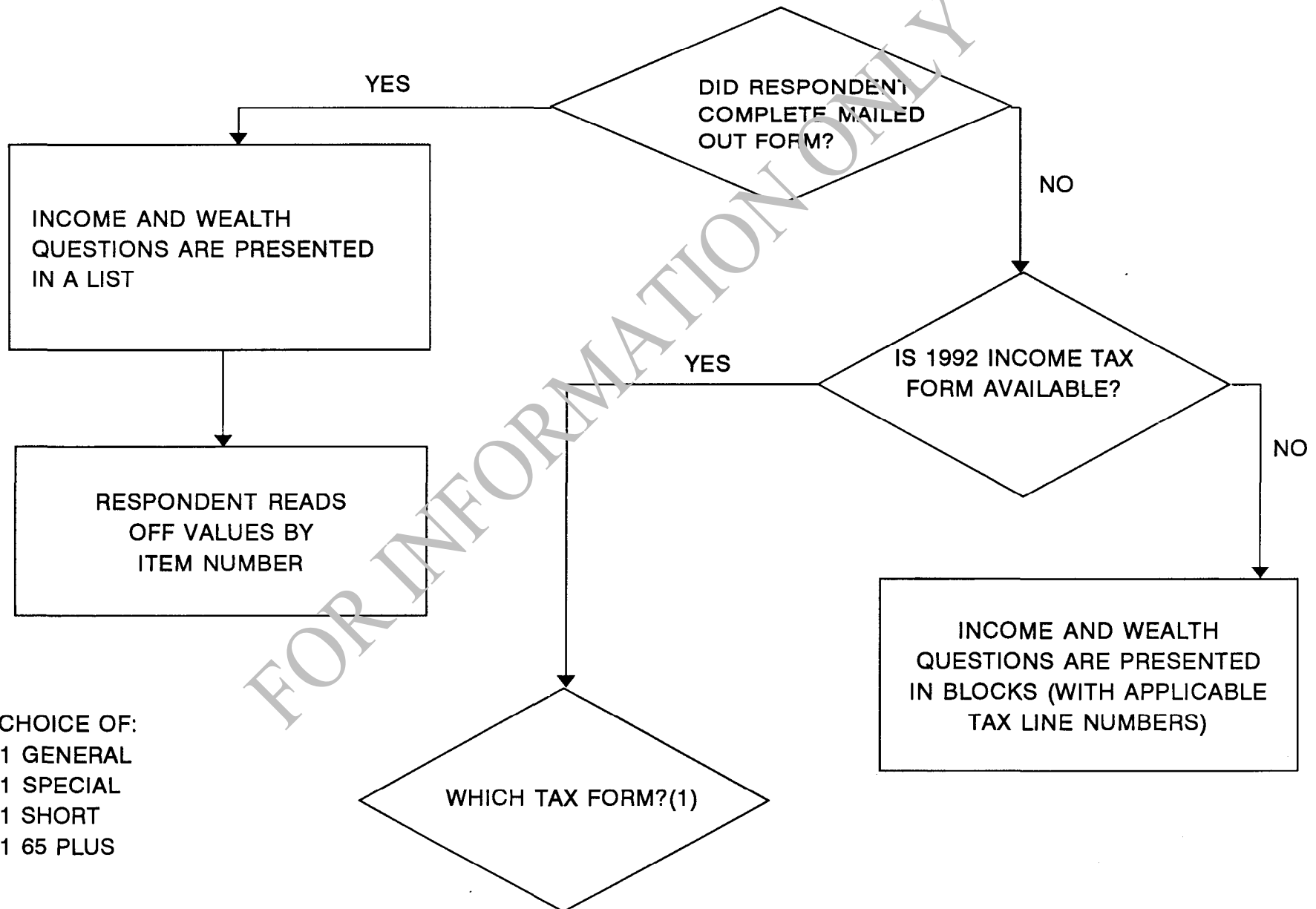
A Statistics Canada interviewer will telephone those families who are sent notebooks. The information will be collected over the phone and entered directly into a portable computer. Certain checks (edits) will be made to catch "large" problems, such as, for example, the interviewer entering an extra zero to change \$10,000 to \$100,000, or not entering the decimal point to change \$538.37 to \$53837.00. In other situations, information collected in the field test in January 1993 will be used to help with the May 1993 data collection. For example, a respondent who reported working at a paid job during 1992 should report a wages and salaries amount.

The interviewer will attempt to collect information on all persons in the household during the same call. If any person wishes to keep his/her information private, the interviewer will collect the information separately, with a second telephone call if necessary. If everyone has completed the notebook, the collection should not be too problematic. For those persons who have not completed a notebook, the interviewer will attempt to collect the information, by proxy if necessary.

The format used in the following sections is similar to that used in SLID Research Paper 93-02 "SLID Labour Interview: "Questionnaire" - January 1993", which provided the question wording and flow for that test. That is:

Question numbers: For each section, the question numbers generally refer to the actual numbers used in the software and which appear on an interviewer's computer screen.

SLID INCOME AND WEALTH INTERVIEW:
GENERAL FLOW CHART



- (1) CHOICE OF:
T1 GENERAL
T1 SPECIAL
T1 SHORT
T1 65 PLUS

Pre-fill items: These are items specific to each interview. The software adds the relevant information into the question, making it simply a matter of reading for the interviewer.

[respondent] - This is the first and last name of the household member that the questions refer to. This is not necessarily the person who is talking to the interviewer.

[proxy] - This is the person to whom the interviewer is speaking.

Headers: For some sections, important information is noted at the top of the screen. In this document, this information is explained at the beginning of each section description.

Function Keys: Interviewers have a number of keys on the computer (function keys) which are available to provide them with the following options.

Help - will provide instructions related to the question on the screen ("item-sensitive" help).

Comment - gives the interviewer the opportunity to add additional information in a note that will be attached to the data for that question.

These comments are often useful during data processing.

Don't know: to indicate if the respondent doesn't know the answer to the question. This answer is shown in this paper as DK.

Refusal - to indicate if the respondent refuses to answer the question. This response is shown in the paper as R.

Options - gives the interviewer access to some optional functions or information rosters. For example, one option allows the interviewer to calculate year of birth based on the respondent's age; another allows the interviewer to view the responses given by other household members to a

particular question. This could be useful, for example, in determining whether a joint asset had been reported correctly.

Some changes were made between the January 1993 and May 1993 tests to the front-end portion of the survey which update household composition and basic demographic information. However, they are not significant enough to report in this document. An update to SLID Research Paper 93-02, outlining the January 1994 questions, will provide this information. Only the questions related to the income and wealth data will be covered here. The questions below commence once the interviewer selects a person about whom the income and wealth information is required. Thus, all questions pertain to a particular individual.

SLID collects data on all longitudinal respondents (i.e., all those living in selected households when a panel is introduced). In future interviews, all persons living with a longitudinal respondent (termed "joiners", although, in fact it may be the longitudinal respondent who joins another household). All joiners are asked the questions in the Preliminary Interview. (These are the same questions asked of longitudinal respondents when a panel is introduced.) As well, if a joiner was living with the longitudinal respondent on January 1 of the year of interview, he/she is eligible for the collection of the labour and income data (provided that the age criterion is met). However, to simplify procedures for the May 1993 test, joiners will receive the Preliminary Interview only, regardless of when they "joined" the household. The income and wealth data will be collected only about those to whom a notebook is mailed.

4.2 INTRODUCTORY QUESTIONS

The first step is to determine whether the SLID notebook had been completed. If not, the interviewer will determine whether the person's income tax form is

available as reference when collecting the information. As can be seen, the approach to collecting the data differs according to whether the SLID Notebook had been completed and, to a lesser extent, whether the tax form is available for reference. Those who have completed the SLID Notebook will follow the "respondent-driven" route, described in Section 4.3. All others will follow the "interviewer-driven route", described in Section 4.4.

INC-Q1A: NOW I WOULD LIKE TO ASK ABOUT [respondent]'S 1992 INCOME, AND ABOUT THE THINGS HE/SHE OWNS (ASSETS), AND WHAT HE/SHE OWES (DEBTS).

ALL THE INFORMATION WILL BE KEPT STRICTLY CONFIDENTIAL.

INC-Q1B: Interviewer: Who are you now talking to? (If the person is not on the list, use the F4 (Comment) to enter the name).

INC-Q1C: DO YOU HAVE THE SLID NOTEBOOK COMPLETED AND AVAILABLE FOR [respondent] ?

Yes - Go to INC-Q4

No - Go to INC-Q2

INC-Q2: AMOUNTS FOR MANY OF THE ITEMS CAN BE FOUND ON THE INCOME TAX FORM. IS [respondent]'S 1992 INCOME TAX FORM AVAILABLE?

Interviewer: If necessary, ask the respondent to go and get the tax form before proceeding.

Yes - Go to INC-Q3

No - Go to INC-Q5

INC-Q3. WHICH TAX FORM IS IT?

T1 General

T1 Short

T1 Special

T1 65 Plus

Interviewer: The tax form identifier can be found in the top right-hand corner.

After the appropriate tax form is selected, go to INC-Q5.

INC-Q4. Interviewer: Hit <Enter> after reading text.

PLEASE GO THROUGH THE NOTEBOOK AND READ THE AMOUNTS ENTERED IN THE BOXES.

Flow then proceeds to "respondent-driven" route - full-screen questionnaire.

INC-Q5: Interviewer: Read each item. If a tax form line number appears next to a question, ask the respondent to read the amount from the tax form. If "N/A" appears, skip the question. Use F1 (Help) for more information on a particular item. Hit <Enter> to proceed.

Flow then proceeds to "respondent-driven" route.

4.3 RESPONDENT-DRIVEN ROUTE

For those respondents with a completed SLID Notebook, it is desirable to collect the information as quickly as possible. Although respondents may not view it in this way, it is a reward for completing the form. Thinking of a panel of respondents in SLID for six years, collecting the information quickly is positive reinforcement of the respondent's decision to complete the notebook, likely to motivate him/her to do the same the following year.

Another factor in determining the approach to collecting the data is that most people will have very few income sources. Based on information from the Survey of Consumer Finances (SCF), on average, a person will have only three or four income sources (from a total list of 35 in SLID).

Thus, data will be collected from those persons with a completed notebook in the following fashion. The interviewer will instruct the respondent to read through the notebook, report the question number and the amount for those questions with entries (INC-Q4 given in previous section). This avoids asking the questions (which is not required since the respondent is only reporting the answers, and, in the case of a proxy reporter, does not even have to understand the questions) and also avoids the respondent having to say "zero" to all the non-applicable income sources.

Header Information:

Notebook of: [respondent]

Given by: [proxy]

4.4 INTERVIEWER-DRIVEN ROUTE

The respondents who follow this route will not have completed the notebook. Many of these respondents may be reluctant to provide any information. Although we would ideally like to ask every one of the 61 questions in the notebook to every respondent, it was felt that this would lead to low response rates. This is particularly true when many of the income sources are non-applicable. Therefore, the complete set of questions were split into groups of logically-connected questions, or "blocks". One overall question is asked for each block. If the respondent replies "No" to the block question, he/she is asked the question for the

next block. A "Yes" response requires the respondent to give amounts for the relevant items. Hopefully, this will lead to reduced interview time and higher response rates.

For those persons who have their tax forms for reference during the interview, the screen will display the appropriate tax item. The interviewer can then instruct the respondent to read the number from the appropriate line on the tax form. As opposed to the notebook, the tax references can be "tailored" to the correct tax form.

The block questions are listed below. Those people not using a tax form for reference during the interview and those using either a T1 General or T1 Special tax form will be asked all block questions. Those people using a T1 Short tax form skip block questions C, D, P. Those using a T1 65Plus tax form skip block questions B, C, P. To use these tax forms (i.e., T1 Short or T1 65Plus), a person must not have certain types of income sources. Therefore, it is known that all items in the skipped blocks must be zero.

Header Information...

Given by: [proxy]

Interviewer: If "Yes", ask each item.

BLOCK QUESTIONS

- A. DID [respondent] RECEIVE ANY WAGES AND SALARIES? (Q1)

- B. DID [respondent] RECEIVE ANY SELF-EMPLOYMENT INCOME SUCH AS BUSINESS, PROFESSIONAL, COMMISSION, FARMING OR FISHING INCOME? (Q2-Q6)

- C. DID [respondent] HAVE ANY OTHER EMPLOYMENT INCOME SUCH AS TIPS OR ROYALTIES? (Q7)
- D. DID [respondent] RECEIVE AN EMPLOYMENT PENSION OR SUPERANNUATION, INCLUDING SURVIVOR'S PENSION? (Q8)
- E. DID [respondent] RECEIVE ANY CANADA OR QUEBEC PENSION (CPP/QPP), OLD AGE SECURITY (INCLUDING GUARANTEED INCOME SUPPLEMENTS AND SPOUSE'S ALLOWANCE), OR VETERAN'S AFFAIRS PENSION? (Q9-Q11)
- F. DID [respondent] RECEIVE ANY UNEMPLOYMENT INSURANCE, WORKER'S COMPENSATION, SOCIAL ASSISTANCE OR PROVINCIAL INCOME SUPPLEMENTS? (Q12-Q14)
- G. DID [respondent] RECEIVE ANY FAMILY OR MATERNITY ALLOWANCE OR CHILD TAX CREDITS? (Q15-Q17)
- H. DID [respondent] RECEIVE ANY OTHER INCOME FROM GOVERNMENT SOURCES, INCLUDING GST CREDIT OR OTHER PROVINCIAL TAX CREDITS? (Q18-Q20)
- I. DID [respondent] RECEIVE ANY INTEREST SUCH AS FROM HIS/HER BANK ACCOUNT OR DIVIDENDS? (Q21-Q22)
- J. DID [respondent] RECEIVE ANY CAPITAL GAINS, RENTAL INCOME, OR OTHER INVESTMENT INCOME? (Q23-Q27)

- K. DID [respondent] RECEIVE ANY INCOME FROM RRIF'S, (Registered Retirement Income Funds), RRSP'S (Registered Retirement Savings Plans) INCLUDING EARLY WITHDRAWALS, OR ANNUITIES? (Q28-Q30)
- L. DID [respondent] RECEIVE ANY ALIMONY OR CHILD SUPPORT? (Q31)
- M. DID [respondent] RECEIVE ANY MONEY FROM PERSONS NOT LIVING WITH HIM/HER, INHERITANCES, LIFE INSURANCE, LOTTERY WINNINGS, OR OTHER LUMP SUM INCOME? (Q32-Q34)
- N. DID [respondent] RECEIVE ANY OTHER INCOME? (Q35)
- O. TOTAL INCOME HAS BEEN CALCULATED BY THE COMPUTER AS _____. WOULD YOU LIKE TO CHANGE THIS AMOUNT?(Q36)
- P. DO YOU KNOW HOW MUCH INCOME TAX [respondent] PAID (LINE 435)? (Q39)
- Q. DOES [respondent] HAVE A PENSION ADJUSTMENT AMOUNT (LINE 206)? (Q40)
- R. DID [respondent] CONTRIBUTE TO A PENSION PLAN IN 1992 (LINE 207)? (Q41)
- S. THE REST OF THE QUESTIONS ASK ABOUT ITEMS OWNED AND MONEY OWED. FOR ITEMS WHICH [respondent] OWNS OR OWES WITH SOMEONE ELSE, REPORT [respondent]'S SHARE ONLY.

DOES [respondent] OWN THE HOME HE/SHE IS LIVING IN? (Q43-Q44)

- T. DOES [respondent] OWN ANY OTHER REAL ESTATE? (Q45-Q46)
- U. DOES [respondent] OWN ANY CARS, TRUCKS, OR OTHER VEHICLES FOR TRANSPORTATION? (Q47)
- V. DOES [respondent] OWN ANY BOATS, TRAILERS, MOTOR HOMES, OR OTHER RECREATIONAL VEHICLES? (Q48)
- W. DOES [respondent] OWN ALL OR PART OF A FARM OR BUSINESS? (Q49)
- X. DOES [respondent] HAVE ANY BANK ACCOUNTS, OTHER SAVINGS, CANADA SAVINGS BONDS, MUTUAL FUNDS, OR CORPORATE STOCKS OR BONDS? DO NOT INCLUDE RRSPs OR RRIFs. (Q50-Q52)
- Y. DOES [respondent] HAVE MONEY IN AN RRSP (Registered Retirement Savings Plan), RRIF (Registered Retirement Income Fund), OR ANNUITY? (Q53-Q56)
- Z. DOES [respondent] OWN ANY OTHER MAJOR ASSETS OR DOES ANYBODY OWE HIM/HER ANY MONEY? (Q57-Q58)
- A1. DOES [respondent] OWE MONEY ON CREDIT CARDS OR OTHER CONSUMER CREDIT SUCH AS A LAY-AWAY PLAN? (Q59)

A2. DOES [respondent] OWE MONEY ON ANY OTHER PERSONAL LOANS (INCLUDING CAR LOANS) OR A STUDENT LOAN? (Q60-Q61)

4.5 EDIT CHECKS

Three types of edits will be applied during the data collection. The edits are identical for the two collection routes.

The first type of edit is the range check. These will be "soft" checks only, indicating that the amount is feasible but not common. The interviewer need not change the amount if it has been entered correctly. The range checks implemented for the May 1993 test are given below.

	Description	Soft MIN	Soft MAX
1	Wages and Salaries	0	99,999.99
2	Other employment income	0	50,000.00
3	Business Income	-99,999.99	150,000.00
4	Professional Income	-99,999.99	150,000.00
5	Commission Income	-99,999.99	99,999.99
6	Farm Income	-99,999.99	99,999.99
7	Fishing Income	-99,999.99	150,000.00
8	Employment pension	0	50,000.00
9	CPP/QPP	0	12,000.00
10	OAS+ GIS+ SPA	0	14,000.00
11	Veterans' Pensions	0	18,000.00
12	U.I.	0	24,000.00
13	Worker's Comp	0	50,000.00
14	Social Assistance & Prov Income Supps	0	20,000.00

	Description	Soft MIN	Soft MAX
15	Fed Fam Allowance	0	4,000.00
16	Quebec Fam Allow	0	3,000.00
17	Child Tax Credit	0	3,000.00
18	GST Credit	0	1,000.00
19	Prov Tax Credits	0	3,000.00
20	Other gov't income	0	18,000.00
21	Interest	0	9,999.99
22	Dividends	0	40,000.00
23	Limited Partners	-50,000.00	50,000.00
24	Taxable Captl Gain	0	9,999.99
25	Net Capital Gain	-99,999.99	99,999.99
26	Net rental income	-25,000.00	40,000.00
27	Other invest income	-10,000.00	50,000.00
28	RRIF Income	0	30,000.00
29	Annuity income	0	40,000.00
30	RRSP Withdrawals	0	20,000.00
31	Alimony received	0	20,000.00
32	Money gifts	0	9,999.99
33	Inheritances	0	200,000.00
34	Other lump sum	0	9,999.99
35	Other income	0	9,999.99
36	Total income	running total - 10%	running total + 10%
37	Total federal income tax paid	0	50% of item 36
38	Total prov. income tax paid	0	50% of item 36
39	Total income tax paid	0	50% of item 36
40	Pension Adjustment	0	11,500.00

	Description	Soft MIN	Soft MAX
41	Registered Pension Plan Contrib.	0	15% of item 1
42	Pension Plan Registration Number	no range edit on this cell	
43	Value of House	0	500,000.00
44	Mortgage on home	0	100% of item 43
45	Other real estate	0	999,999.99
46	Mortgage on other real estate	0	100% of item 45
47	Cars, trucks, vans, motorcycles	0	60,000.00
48	Boats, motorhomes, trailers, snowmobiles, other R.V.	0	99,999.99
49	Farm or Business	0	5,000,000.00
50	Bank account, GIC, other savings	0	50,000.00
51	CSBs, T-Bills, other government bonds	0	50,000.00
52	Mutual funds, stocks and bonds	0	50,000.00
53	RRSPs	0	60,000.00
54	RRSPs sponsored by employer	0	25,000.00
55	Annuities	0	99,999.99
56	RRIFs	0	99,999.99
57	Anyone owes you money	0	9,999.99
58	Other major assets	0	50,000.00
59	Owe on credit cards	0	9,999.99
60	Student loans	0	20,000.00
61	Personal loans	0	50,000.00

The second type of edit is a comparison with information collected in the January 1993 test. For each of these, information was collected in January which indicated an income source which should be reported. If no value was reported, the interviewer is instructed to query the respondent. Five such edits were implemented:

Wages and Salaries

BASED ON OUR JANUARY INTERVIEW, AN AMOUNT FOR WAGES AND SALARIES WAS EXPECTED. DID WE MISS IT?

Old Age Security

BASED ON ...'S AGE, AN AMOUNT FOR OLD AGE SECURITY WAS EXPECTED. DID WE MISS IT?

Unemployment Insurance

BASED ON OUR JANUARY INTERVIEW, AN AMOUNT FOR UNEMPLOYMENT INSURANCE (UI) WAS EXPECTED. DID WE MISS IT?

Worker's Compensation

BASED ON OUR JANUARY INTERVIEW, AN AMOUNT FOR WORKER'S COMPENSATION WAS EXPECTED. DID WE MISS IT?

Social Assistance

BASED ON OUR JANUARY INTERVIEW, AN AMOUNT FOR SOCIAL ASSISTANCE (WELFARE) WAS EXPECTED. DID WE MISS IT?

The third type of edit is a check on total income. This may be done in one of two ways. Question 36 in the Notebook is Total Income. The respondent is given the option of entering a number or not. If the person has entered an amount, it is compared to the calculated total (based on the reported amounts to Questions 1 to 35). If the amounts are the same or differ by less than 10%, the edit passes. Otherwise, the interviewer is instructed to query the respondent. If the respondent does not enter an amount in Question 36 or if the respondent follows the Interviewer-Driven Route, the interviewer reports the calculated total income amount to the respondent, and asks him/her to comment on its accuracy.

Question wording for the Total Income Edit is given below.

1) If person has given a total
THE COMPUTER CALCULATED THE TOTAL AS BEING \$XXX. PERHAPS I MADE A MISTAKE ENTERING THE NUMBERS FOR ... COULD WE REVIEW THEM?

2) If person has not given a total
(This will occur if person is directing the interview and did not calculate the total or if the person is following the interviewer-driven route.)
TOTAL INCOME HAS BEEN CALCULATED BY THE COMPUTER AS \$_____. WOULD YOU LIKE TO CHANGE THIS AMOUNT?

4.6 RESPONDENT DEBRIEFING QUESTIONS

The respondent debriefing questions will be asked after the last interview is completed for a household. In situations where more than one person provides information for a household, the questions will be directed only to the last respondent (i.e., the person to whom the interviewer is speaking at the time).

One can design many questions for this part of the interview, covering a wide range of relevant topics. However, it is desirable to limit the time taken and therefore only a few questions will be asked. The primary objective of the respondent debriefing questions for Test 3B will be to determine the respondents' reactions to the SLID Notebook and its contents.

Two question sets will be implemented. Every person chosen for the debriefing module will be asked the questions in one set only, depending on whether a SLID notebook had been completed prior to the interview for that respondent. (Note that even though a SLID notebook had been completed, the respondent may not have completed it himself/herself.)

DEB-INTRO: WE ARE INTERESTED IN YOUR THOUGHTS AND FEELINGS ABOUT OUR SURVEY. YOUR ANSWERS TO A FEW MORE QUESTIONS WILL HELP US IMPROVE IT.

Step 1: Interviewer: Do not ask the question if you already know the answer.

WAS YOUR SLID NOTEBOOK COMPLETED BEFORE THE INTERVIEW?

If Yes, Go to DEB-A1.

If No, Go to DEB-B1.

Path A: (For respondents with a completed notebook.)

DEB-A1. DID YOU COMPLETE THE SLID NOTEBOOK YOURSELF
OR DID SOMEONE ELSE COMPLETE IT FOR YOU?

Myself, go to DEB-A2.

Someone else, go to DEB-A6.

DK/R, go to DEB-A6.

DEB-A2. HOW LONG DID IT TAKE TO COMPLETE YOUR OWN
NOTEBOOK?

Interviewer: Completion time for the one person only.

Less than 15 minutes

15 to 30 minutes

31 to 60 minutes

More than 1 hour

DEB-A3. WHAT WERE THE MAIN REASONS YOU COMPLETED THE
NOTEBOOK?

Interviewer: Mark all that apply. Do not read the list, unless the
respondent needs help.

Thought I had to

Looked interesting

Thought it would not take long

Wanted to help out / do my share

Other - specify

DEB-A4. DID YOU REFER TO YOUR INCOME TAX FORM OR
OTHER FINANCIAL RECORDS WHEN COMPLETING THE
NOTEBOOK?

Interviewer: Mark all that apply.

Did not use any records

T1 Income tax form

T4s and other tax statements

Statements from: Banks and other financial institutions

Accountant, stock broker, etc.

Insurance companies

Credit card companies

Employer(s)

Other

DEB-A5. WERE THERE ANY QUESTIONS IN THE NOTEBOOK WHICH WERE DIFFICULT TO ANSWER?

Yes - Specify

No

DEB-A6. IF YOU WERE PART OF OUR LONG-TERM SURVEY, WOULD YOU GIVE US YOUR SOCIAL INSURANCE NUMBER AND AUTHORIZE ACCESS TO YOUR INCOME TAX FORM? THIS WOULD REDUCE THE INTERVIEW TIME.

Yes

Maybe

No

GO TO END-THANKS.

Path B: (For respondents without a completed notebook.)

DEB-B1. WHAT WERE THE MAIN REASONS YOU CHOSE NOT TO COMPLETE THE SLID NOTEBOOK?

Interviewer: Mark all that apply. Do not read the list, unless the respondent needs help.

Did not receive it

Did not have enough time

Forgot to do it

Looked too difficult

Did not have my tax form to consult

Did complete it but cannot find it now

Started it but found it too difficult

Too long

Other - specify

DEB-B2. IF YOU WERE PART OF OUR LONG-TERM SURVEY, WOULD YOU COMPLETE THE NOTEBOOK SENT TO YOU NEXT YEAR?

Yes - Go to DEB-B6

Maybe - Go to DEB-B5

No - Go to DEB-B3

DK - Go to DEB-B5

Refusal - Go to DEB-B3

DEB-B3. WHAT WERE THE MAIN REASONS YOU WOULD NOT?

Interviewer: Mark all that apply. Do not read the list, unless the respondent needs help.

No benefit for me to do so

Not interested

Would not understand how to do it

Would probably not have time

Other (specify)

DEB-B4. IS THERE ANYTHING WE COULD DO TO ENCOURAGE YOU TO COMPLETE IT?

If yes, specify and go to DEB-B5

If no, go to DEB-B6

DK / R, go to DEB-B6

DEB-B5. IF YOU WERE PART OF OUR LONG-TERM SURVEY, WHAT STEPS WOULD YOU TAKE TO PREPARE FOR NEXT YEAR'S INTERVIEW?

Interviewer: Mark all that apply. Do not read the list, unless the respondent needs help.

None

Keep copy of income tax form available

Keep other financial documents available

Attempt to complete notebook

Other (specify)

DEB-B6. IF YOU WERE PART OF OUR LONG-TERM SURVEY,
WOULD YOU GIVE US YOUR SOCIAL INSURANCE
NUMBER AND AUTHORIZE ACCESS TO YOUR INCOME
TAX FORM? THIS WOULD REDUCE THE INTERVIEW
TIME.

Yes

Maybe

No

GO TO END-THANKS.

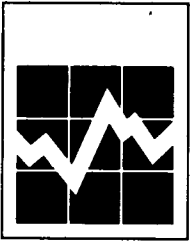
END-THANKS. THANK YOU FOR YOUR PARTICIPATION.

FOR INFORMATION ONLY

APPENDIX 1

MAY 1993 SLID NOTEBOOK

FOR INFORMATION ONLY



Survey of Labour and Income Dynamics Notebook

May 1993



Statistics
Canada

Statistique
Canada

Canada

Your participation is valuable.

In January, we called to ask about your work experiences. In May, your interviewer will call again to ask about your income in 1992 and about what you own (assets) and what you owe (debts).

What will I be asked to do?

Read the introductory information and Helpful Tips. Then follow the questions and answer in the boxes provided. Don't be overwhelmed! Although there are many questions, not all will apply to you.

What do I do with the completed notebook?

Once you finish, your notebook should be kept with those completed by others in your family. A Statistics Canada interviewer will call in May to get the answers for everyone. When she calls, it's a simple matter of reading the answers. If any members of your family wish to keep their information private, the interviewer can get the information from them directly.

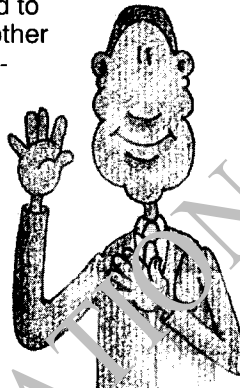


Why is this information important?

Some of the issues facing us today include poverty, the impact of the recession, and the adequacy of pensions. Information is necessary to understand these issues better and to help develop solutions. Although past surveys have collected information on labour and income, this is the first survey to link them together.

Will the information I give be confidential?

Yes. By law, Statistics Canada must protect the confidentiality of your information. No information that identifies you will be released to anyone, not even other government departments. Every Statistics Canada employee is sworn to secrecy to make sure your information is kept strictly confidential.



Why don't you get the information directly from Revenue Canada?

Without your permission, we cannot use the information you have given to Revenue Canada. Besides, some of the information required cannot be found on your tax form.

What if I have any further questions?

Specific questions about this notebook can be discussed with your interviewer. General questions about Statistics Canada or this survey can be directed to your nearest regional office. The regional offices are listed on the back cover.

Helpful tips for completing your answers

Answer as best you can.

We would like you to be as accurate as possible. If you do not have exact numbers, give us your best estimate. Report all amounts in Canadian dollars.

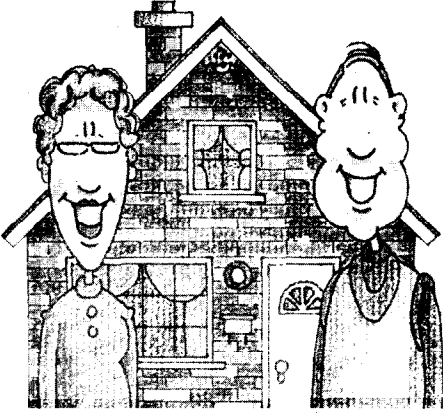
Save time. Use your income tax form.

For many questions, the notebook gives line numbers corresponding to the blue 1992 income tax form (T1 General or T1 Special). Where line numbers are stated, just copy the amounts from your tax form to the notebook. If you used another income tax form (T1 Short or T1 65Plus), it will be a useful reference tool, even if the line numbers are not applicable. If you did not complete a 1992 income tax form or if your form is not available, do the best you can.



Joint assets.

For jointly-held assets, report only your share. For example, if you own your home jointly with your spouse, report only your share of the total value of the house.



Not everything is on your tax form.

The questions without references to the income tax form are also important. Referring to other financial documents will help you answer them.

Report only once.

A particular income, asset or debt should be reported only in one place. For example, if you have Guaranteed Investment Certificates (GIC) in an RRSP, you should report them only as RRSPs and not also as GICs.

Immigrants in 1992.

Do not report income you made before you arrived in Canada.



Questions 1 to 36 ask about income you received in 1992. Some of these amounts can be copied from your 1992 income tax form which will also help you answer questions 37 to 42.

1 Wages and salaries before deductions

\$ _____

(line 101)

Include commissions, and fringe benefits or taxable benefits such as personal use of company car, housing, board and lodging.

If self-employed at any time during 1992:

Report your net income in questions 2 to 6. This is your gross income less operating expenses, depreciation and capital cost allowances. For losses, write LOSS beside the amount. Report income from an incorporated business as wages and salaries in question 1 and/or dividends in question 22. For Net Farm Income, include farm program payments and rebates, Canadian Wheat Board payments, crop insurance etc.

2 Net Business Income

\$ _____

(line 135)

3 Net Professional Income

\$ _____

(line 137)

4 Net Commission Income

\$ _____

(line 139)

5 Net Farm Income

\$ _____

(line 141)

6 Net Fishing Income

\$ _____

(line 143)

7 Other employment income including tips, etc.

\$ _____

(line 104)

Include also wage-loss replacement programs, director's fees, royalties from your work or inventions, and payments from research grants.



8 Employment pension, superannuation, including survivors' pensions

\$ _____

(Box 16 from your T4A)

Do not include income from Canada or Quebec Pension Plans.

9 Canada or Quebec Pension Plan benefits

\$ _____

(line 114)

Mark all that apply:

- Retirement
- Disability
- Survivors

10 Old Age Security (OAS) benefits, including Guaranteed Income Supplements (GIS) and Spouse's Allowance (SPA)

\$ _____

(line 113 plus line 146)



11 Pensions from Veterans Affairs (veteran and civilian)

\$ _____

12 Unemployment Insurance benefits before deductions

\$ _____

(line 119)

Mark all that apply:

- Regular
- Maternity/Parental
- Fishing
- Training
- Sickness
- Other

13 Workers' Compensation benefits before deductions

\$ _____

(line 144)

14 Social Assistance (Welfare) and Provincial Income Supplements

\$ _____

Report all social assistance (welfare) payments as well as rental assistance, child care subsidies, seniors' income supplements, and assistance for people with disabilities. Some, but perhaps not all, of these amounts are shown in line 145 of your income tax form. Make sure that you report ALL payments.

15 Federal Family Allowances

\$ _____

(line 118)

16 Quebec Family, Newborn and Maternity Allowances

\$ _____



17 Child Tax Credit

\$ _____

(line 444)

18 GST (Goods and Services Tax) Credit

\$ _____

If eligible to receive a GST credit, you would usually receive a cheque in January, April, July and October, OR, if you were eligible to receive less than \$100, you would have received only one cheque in July. The amount received in January and April is usually different from the amount received in July and October.

19 Provincial Tax Credits

\$ _____

(For Alberta, add lines 479+480; For Quebec, add lines 458, 459, 460 and 461 on Provincial Form; All other provinces, line 479)

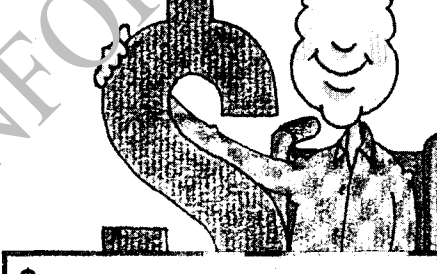
20 Other income from government sources not included above

\$ _____

Specify _____

Include property tax credits and home owner grants, government compensation of any kind, payments to foster parents, payments received from training programs sponsored by the federal and provincial governments, regular payments from provincial automobile insurance plans (excluding lump sum payments), or any other government income not previously reported.

21 INTEREST from bank accounts, Canada Savings Bonds, other bonds, and investment certificates (except RRSPs and RRIFs)



\$ _____

(line 121)

Include also gross foreign interest and dividend income as well as earnings (but not lump sum payments) from life insurance policies.

22 Dividends from Canadian sources

\$ _____

(line 120)

Give your taxable dividends as reported on your income tax return. If this amount is unavailable, calculate taxable dividends by multiplying the dividends you actually received by 5/4 (or 1.25). Include Canadian dividends received by your spouse that you declared for income tax purposes.

23 Net partnership income: limited or non-active partners only

\$ _____

(line 122)

For losses, write LOSS beside the amount.

If you had any capital gains or losses:

24 Taxable capital gains

\$ _____

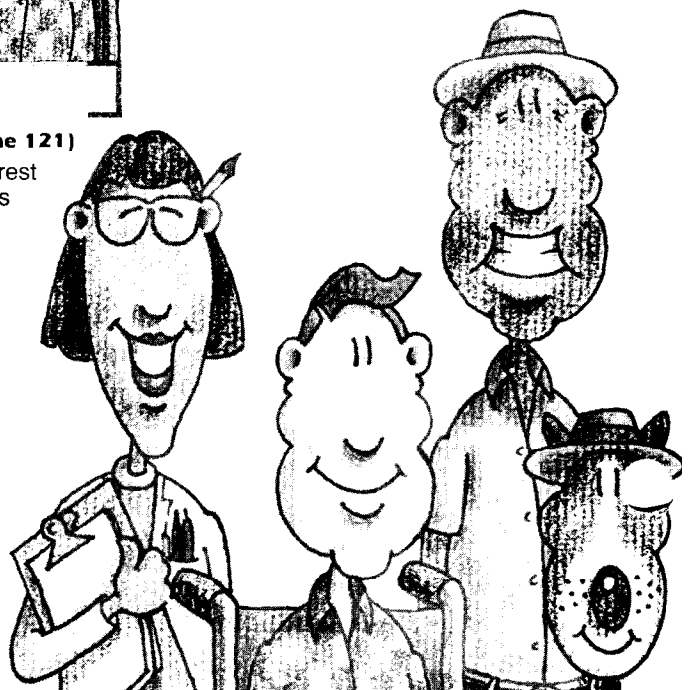
(line 127)

25 Net capital gains or losses

\$ _____

(line 537 of Schedule 3)

For losses, write LOSS beside the amount.



26 Net rental income

\$ _____

(line 126)

Include farm rental, net income from roomers and boarders, etc.

This is net of expenses incurred to earn that income such as heating and electricity, maintenance, painting and repairs, and extra taxes you may have had to pay because you are renting out part of your property. For losses, write LOSS beside the amount.



27 Other investment income (except retirement income such as RRSPs and RRFs)

\$ _____

Specify _____

Include interest RECEIVED from loans and mortgages that you hold, regular income from an estate or trust fund, etc.

28 Income from any Registered Retirement Income Funds (RRIF)

\$ _____

(Box 16 from your T4RIF)

29 Income from annuities, including income from RRSP eligible annuities and Deferred Profit-Sharing Plans (DPSPs)

\$ _____

30 Money from RRSP withdrawals before withholding tax

\$ _____

Report this if you cashed in or withdrew money from an unmatured Registered Retirement Savings Plan (RRSP). Do not include tax-free withdrawals allowed for a down payment on your home.

31 Alimony, separation allowance, child support RECEIVED

\$ _____

Mark type of support:

- Support for yourself only
- Child support only
- Both

32 Money given to you by persons not living with you to help with such things as living expenses, mortgage or rent payments, tuition, car payments

\$ _____

Report cash received and the value of gifts including loans you do not expect to repay.

33 Inheritances including value of any inherited property, goods, bonds, stocks, etc.

\$ _____

Report the amount of cash and other items received from an inheritance in 1992. Include the value of inherited land, house, cars, and financial assets.



34 Lump sum income from life insurance, death benefits, lottery winnings, etc.

\$ _____

Include also lump sum payments such as severance pay and retirement allowances, pension plans and deferred profit-sharing plans, bingo and casino winnings.



35 Other income

\$ _____

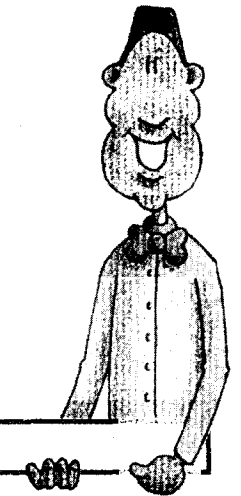
Specify _____

Include non-refundable scholarships and student grants, and income from outside Canada while living in Canada.

36 TOTAL INCOME

\$ _____

This is the total of questions 1 - 24 and 26 - 35. If you are not sure of the amounts of individual questions, report your best estimate of your 1992 income (or net loss). For losses, write LOSS beside the amount. Note: At this point in the interview our computer will add up all your income and give you a total. You may also wish to do the total yourself as a double check of all your entries.



If you were living in Quebec on December 31, 1992:

37 Total Federal Income Tax Paid

\$

(line 435)

Include Federal Income Tax and any repayment of social benefits and child tax credit.

38 Total Provincial Income Tax Paid

\$

(From Quebec Provincial Tax Form line 444)

If you were living in any other province on December 31, 1992:

39 Total Income Tax Paid (both Federal and Provincial)

\$

(line 435)

Include Federal and Provincial Income Tax and any repayment of social benefits and child tax credit.

If you worked at any time during 1992, provide the following pension information from your income tax forms:

This information is required to estimate the value added to your pension plan as a result of 1992 contributions. If you have more than one Registration Number (from two or more jobs), report them all. Do not include information on Canada or Quebec Pension Plans (CPP or QPP).

40 Pension Adjustment (PA) Amount

\$

(line 206)

41 Registered pension plan contributions

\$

(line 207)

42 Pension Plan Registration Numbers

(Box 50 from your T4 forms)

Questions 43 to 61 ask about major items you now own and money you now owe.

If you own the home you are living in:

43 How much would you get if you sold it today? Report your share only.

\$

If you own the home you are living in, report its current market value before paying commissions, legal fees, moving expenses, taxes and other expenses related to selling it. If you use some rooms of your home or some of your land for business, subtract the portion attributable to the business and report it in question 49.



44 How much is still owing on all mortgages on your home?

\$

If you own any other real estate, such as a vacation home, land or rental property:



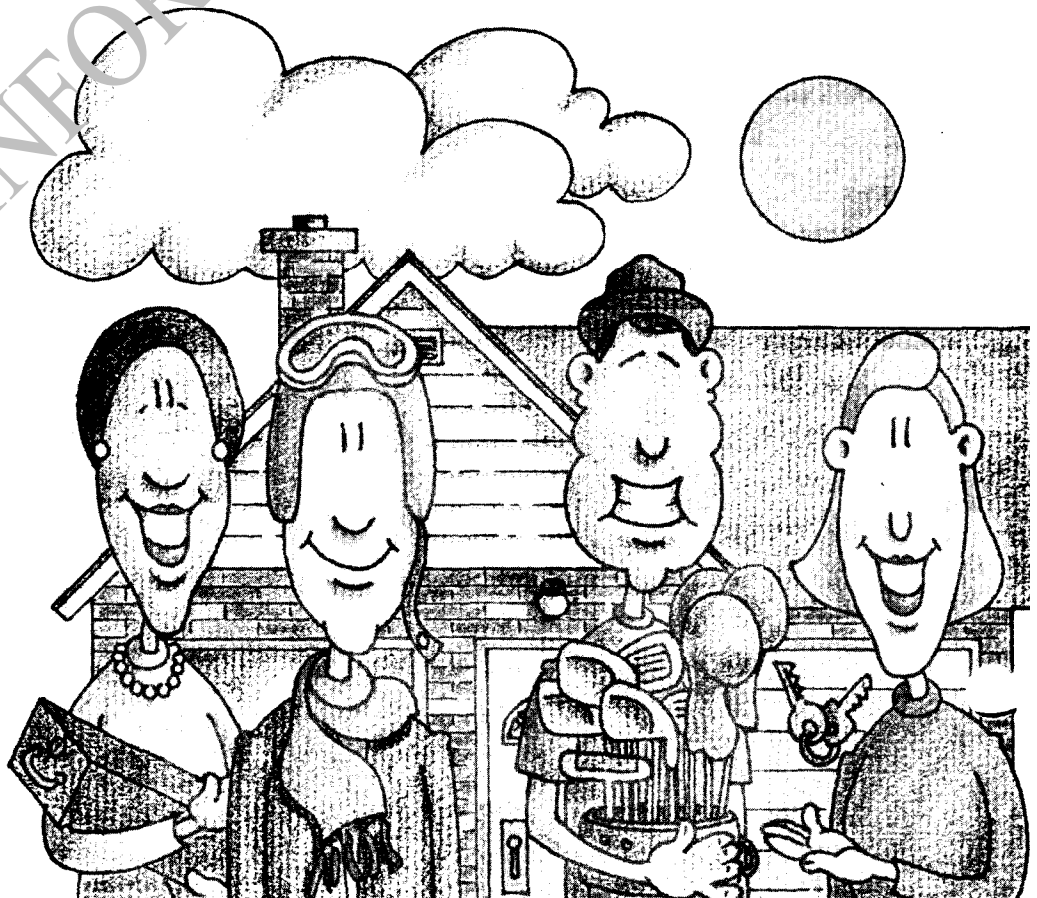
45 How much would you get if you sold it today?

\$

For any other property, report the current market value before paying commissions, legal fees, moving expenses, taxes and other expenses related to selling them. Property used for your business should be reported in question 49.

46 How much is still owing on all mortgages on these other properties?

\$



47 If you own any cars, trucks, vans, motorcycles, etc., how much would you get if you sold them all today?

\$ _____

Report how much they would be worth, before paying taxes and other expenses related to selling them. Do not report the value of vehicles used solely for business.

48 If you own any boats, motor homes, trailers, snowmobiles or other recreational vehicles, how much would you get if you sold them all today?

\$ _____

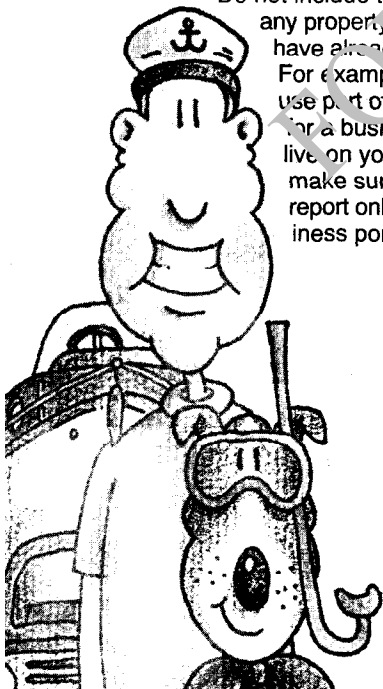
Report how much they would be worth, before paying taxes and other expenses related to selling them. Do not report the value of vehicles used solely for business.

49 If you own all or part of a farm or business, how much would you get if you sold all of it today (including equipment), and paid off all debts and mortgages on it?

\$ _____

Report the amount you would receive for your share, but not any required commissions, legal fees, moving expenses, taxes and other expenses related to selling it. Include the value of all capital equipment, farm equipment, inventory, or livestock.

Do not include the value of any property which you have already reported. For example, if you use part of your home for a business, or live on your farm, make sure that you report only the business portion here.



For questions 50 to 52, do not include investments in RRSPs or RRIFFs.

50 How much do you have in bank accounts, guaranteed investment certificates (GICs), or other savings?

\$ _____

Include money you have deposited in any bank account (savings, chequing), investment certificate, or term deposit. However, Canada Savings Bonds, treasury bills, and mutual funds bought through your bank should be reported in either question 51 or 52.

51 How much do you have in Canada Savings Bonds, treasury bills, or other government bonds?

\$ _____

Report money invested in all types of government bond investment. Include federal, provincial, and municipal bonds. Report market value before paying commissions, penalties and other required expenses. Do not include investments that are registered as RRSPs or RRIFFs.

52 How much do you have in mutual funds, stocks or bonds?

\$ _____

Report the total current market value of all mutual funds, stocks and bonds from publicly traded companies. Stocks, bonds or mutual funds in an RRSP should be reported in question 53.



53 How much do you have in Registered Retirement Savings Plans (RRSPs)?

\$ _____

Mark all that apply:

- Regular Savings
- Investment Certificates
- Mutual Funds
- Stocks and bonds
- Self-directed

Include RRSPs invested with banks and other financial institutions, insurance companies and investment brokers. Report the total amount including all accumulated interest and NOT only the amount contributed in 1992. Spousal RRSPs should be reported by the person whose name the RRSP is in, not the person contributing the money.

54 How much do you have in group RRSPs sponsored by your employer (not included in question 53)?

\$ _____

Report the TOTAL of your share of any group RRSPs sponsored by your employer. Report the total amount including all accumulated interest, and NOT only the amount contributed in 1992.

55 How much do you have in annuities?

\$ _____

Report the total value of the investment now, and NOT the amount of money you received in 1992.



56 How much do you have in Registered Retirement Income Funds (RRIFs)?

\$

Mark all that apply:

- Regular Savings
- Investment Certificates
- Mutual Funds
- Stocks and bonds
- Self-directed

If you have investments in RRIFs or if you have converted RRSPs to RRIFs, report the total amount currently invested or remaining in all RRIFs. Report the total value of the investment now, and NOT the amount of money you received in 1992.

57 If anyone owes you any money such as loans or mortgages you hold, how much is it?

\$

Report money owed to you, if you reasonably expect to get it back, including all accumulated interest. Include all personal loans to relatives and friends, and all mortgages you hold on property owned by others.

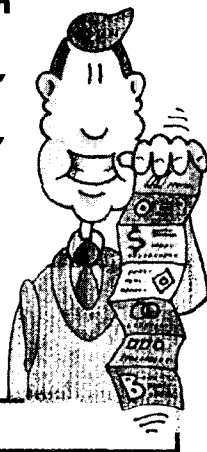
58 What is the value of any other major assets you own that are not included above?

\$

Specify _____

Include money or other assets held in trust for you. Include also all jewellery, other items with investment value, Registered Education Savings Plans (RESPs) (to be reported by the person making contributions), home ownership savings plans (such as OHOSP), and life insurance policies with a savings value (report the total value of the savings, not the value of the life insurance policy).

59 How much do you owe on your credit cards (Visa, Mastercard, etc), charge accounts (Eatons, Sears, etc), or other consumer credit (such as lay-away plans or "no money down" deferred payment plans)?



\$

Report what you currently owe, including interest, on ALL credit cards, charge accounts, lay-away plans and other forms of consumer credit. Include also deferred payment plans (i.e., where you buy an item but do not pay for it until several months later). Report what you currently owe including purchases for which you have not yet been billed.

60 How much do you owe in student loans?

\$

If you are still a student, report the total of your loans before remission (i.e., report the amount now owing).

61 How much do you owe in personal loans (car or home improvement loans, bank loans, loans from persons you do not live with)?

\$

Report all loans from banks and other financial institutions as well as personal loans from anyone outside your household. Include car loans financed by the auto manufacturer. For lines of credit, report only the current balance and NOT the total amount available to be borrowed.

Thank you.

We appreciate your cooperation in this survey. If you have any general questions, please contact the Statistics Canada Regional Office nearest you.

Statistics Canada Regional Offices

Newfoundland and Labrador
 St. John's: 772-4601
 Toll free service: 1-800-565-7192

Ontario
 Toronto: 973-5441
 Toll free service: 1-800-387-0714



APPENDIX 2

**LINK BETWEEN SLID DATA ITEMS AND LINE NUMBERS ON 1992
T1 INCOME TAX FORMS**

FOR INFORMATION ONLY

SURVEY OF LABOUR AND INCOME DYNAMICS - May 1993

REFERENCE FOR SLID LINE NUMBERS TO TAX FORMS

Block No.	Item No.	Description	T1 GENERAL	T1 SPECIAL	T1 SHORT	T1 65 PLUS
A	1	Wages and Salaries	101	101	1	8
B	2	Business Income	135	n/a	n/a	n/a
	3	Professional Income	137	n/a	n/a	n/a
	4	Commission Income	139	n/a	n/a	n/a
	5	Farm Income	141	n/a	n/a	n/a
	6	Fishing Income	143	n/a	n/a	n/a
C	7	Other Employment Income	104	104	n/a	n/a
D	8	Employment pension	T4A Box 16	T4A Box 16	T4A Box 16	3
E	9	CPP/QPP	114	114	6	2
	10	OAS+ GIS+ SPA	113 plus 146	113 plus 146	ask	ask
	11	Veterans' Pensions	ask	ask	ask	ask
F	12	U.I.	119	119	10	n/a
	13	Worker's Compensation	144	144	ask	ask

Block No.	Item No.	Description	T1 GENERAL	T1 SPECIAL	T1 SHORT	T1 65 PLUS
	14	Social Assistance & Provincial Income Supplements	ask	ask	ask	ask
G	15	Federal Family Allowance	118	118	9	n/a
	16	Quebec Family Allowance	ask	ask	ask	ask
	17	Child Tax Credit	444	444	n/a	n/a
H	18	GST Credit	ask	ask	ask	ask
	19	Provincial Tax Credits	Alta 479+480 Que (QU 458-61) Other 479	Alta 479+480 Que (QU 458-61) Other 479	n/a	n/a
	20	Other government income	ask	ask	ask	ask
I	21	Interest	121	121	11	6
	22	Dividends	120	n/a	n/a	5
J	23	Limited Partners	122	n/a	n/a	n/a
	24	Taxable Capital Gain	127	n/a	n/a	n/a
	25	Net Capital Gain	(Sched 3) 537	n/a	n/a	n/a
	26	Net rental income	126	n/a	n/a	n/a
	27	Other invest income	ask	ask	ask	ask
K	28	RRIF Income	T4RIF Box16	T4RIF Box16	T4RIF Box16	T4RIF Box16

Block No.	Item No.	Description	T1 GENERAL	T1 SPECIAL	T1 SHORT	T1 65 PLUS
	29	Annuity income	ask	ask	ask	ask
	30	RRSP Withdrawals	T4RSP Box22	T4RSP Box22	T4RSP Box22	T4RSP Box22
L	31	Alimony received	ask	ask	ask	ask
M	32	Money gifts	ask	ask	ask	ask
	33	Inheritances	ask	ask	ask	ask
	34	Other lump sums	ask	ask	ask	ask
N	35	Other income	ask	ask	ask	ask
O	36	Total Income	ask	ask	ask	ask
P	39	Total Tax	435	435	n/a	n/a
Q	40	Pension Adjustment	206	206	15	17
R	41	RPP contributions	207	207	4	11
	42	Pension registration number	T4 Box 50	T4 Box 50	T4 Box 50	T4 Box 50