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**QUESTIONNAIRE AND COLLECTION PROCEDURES  
FOR SLID INCOME DATA COLLECTION - MAY 1995**

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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), by telephone (613) 951-2891, or by fax (613) 951-3253.

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## **EXECUTIVE SUMMARY**

In May 1995 for a second consecutive year, the Survey of Labour and Income Dynamics (SLID) collected data on income from its first panel of respondents.

A form listing the information needed was sent to respondents so they could prepare for the interview. This year, they were given a choice of ways to report their sources of income. Using the form, they could choose to carry out the interview as in the previous year, or they could grant permission for Statistics Canada to access their income tax returns from Revenue Canada and forego the interview. An interviewer contacted them to determine their preference.

This paper strives to describe the collection procedures and provide an overview of the interview process. The format used for this paper is the same as that for research paper 94-08 which described the questionnaire and interview collection procedures for May 1994.

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## **1. INTRODUCTION**

In May 1995, the Survey of Labour Income and Dynamics collected data on income for the second consecutive year. The data were collected using computer-assisted interviewing. Most of the interviews were conducted by telephone. The people surveyed received a form in advance to allow them to prepare for the interview. This year, they had the option of answering the questions on income as they did last year, or giving permission to Statistics Canada to allow SLID to use the information on their income tax return.

This paper strives to describe the data collection procedures as well as the wording of the questions. Other documents related to this paper describe the collection procedures and questions for the other SLID interviews.

- C 95-03 SLID Labour Interview Questionnaire - January 1995
- C 95-04 SLID Questionnaire for Demographics and Contact: 1995
- C 95-05 1995 Preliminary Interview Questionnaire

## **2. DATA COLLECTION METHOD**

In April, respondent and non-respondent households in the January 1995 interview (except those that flatly refused to participate) received an income package including a newsletter, a 1994 income form for each eligible person in the household (except those who flatly refused to participate) and a reply card to obtain more information on the new option for reporting. The newsletter included a letter that provided an overview of the new option available, a page with more information on this choice that the respondents had to make, some highlights from the 1994 income interview as well as additional information to help those who preferred an interview to filling out the form in advance. Respondents simply had

to check one of the two boxes on the form (interview or permission) and wait for the interviewer to call.

During the collection period (May 1995), interviewers contacted the persons eligible for the income survey. When the respondent gave permission for Statistics Canada to access his tax returns, the interview ended. When the respondent preferred to be interviewed or had not filed a tax return, and had filled out the form, he “directed” the interview. He simply had to indicate the number of items for which he had received income and specify the amount. When the form had not been filled out and the respondent did not want to take the time to fill it out, the interviewer had to read the items individually and the respondent had to specify the amounts received from various sources.

Following the collection period, tracers attempted to track down the people who had moved since January 1995 and those they had been unable to locate during the labour interview (January 1995).

### **3. 1994 INCOME QUESTIONNAIRE**

The purpose of the income form was to give respondents a list of income sources on which data would be collected as well as instructions on how to report the amounts if they decided to be interviewed rather than give permission to examine their records. Since it is easier to answer the questions on income by referring to financial records, such as the income tax return and records of employment, sending the form in advance allowed respondents to take the time to prepare for the interview.

In May 1994, a question was added at the end of the interview to survey respondents' opinions on granting access to their income tax records at Revenue



Canada. (The purpose of the question was to ask for a hypothetical answer, not to seek actual permission.) Slightly more than 50 percent of respondents said they would give permission for SLID to obtain information directly from Revenue Canada. Based on these results, respondents were given a choice and thus, the top part of the form was changed.

To develop the 1994 questionnaire, a few changes were made to the content of the 1993 questionnaire that was developed jointly with the Survey of Consumer Finances team. A copy of the 1994 form is provided in Appendix 1. Readers will note that total income was not reported on the form. Since interviews are computer-assisted, and the computer performs the addition, a decision was made not to ask respondents to perform the calculations themselves. In past years, many did not bother to do this.

The 1994 income form measured 8½" X 14" and was printed on both sides, the English form on one side and the French on the other. It was printed in the SLID colours (green and violet) to show continuity of the survey. The respondent's name was printed at the top. Under this, an arrow pointed to two circles, allowing the respondent to indicate a choice. Here is the top of the form:



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

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

Confidential when completed



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

Français au verso

**Your  
Choice**

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

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

The form was divided into two columns, the first describing the source and the second leaving room to enter the amount (in dollars and cents).

In the newsletter sent to each household, additional information was included for each source identified, to help respondents fill out the form. The newsletter also used the SLID colours. The “SLID people” designed for the SLID Test 3B booklet were also used in this newsletter.

#### **4. COMPUTER-ASSISTED INTERVIEWS**

##### **4.1 OVERVIEW**

Statistics Canada interviewers contacted each household in the sample. The information was collected by telephone and entered directly into a portable computer. When respondents were interviewed, some checks were conducted 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.

Interviewers attempted to collect the information on all members of the household 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 to access their tax file or if the questionnaires were filled out, it was fairly easy to collect the information and the interview proceeded quite quickly. However, when respondents had not filled out the form and did not give permission to access their

tax records, the interviewer attempted to collect the information through a proxy if the respondent were unavailable.

The format of this section is the same as that used in SLID Research Paper 94-08 “*Questionnaire and collection procedures for SLID income data collection - May 1994*”.

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.

Options - gives the interviewer access to a list of other functions or information.

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

Don't know - allows the interviewer to indicate that the respondent does not know the answer to the question.

Refusal - allows the interviewer to indicate that the respondent refuses to answer the question.

End - allows the interviewer to interrupt or terminate the interview.

No major changes were made to the sequencing or wording of the questions on the contact portion from the May 1994 interview. To obtain more details on this part of the interview, refer to SLID Research Paper 95-04. Contrary to May 1994, the question on relationships between members of the household was asked or updated if the information was missing. Once again, the questions on respondents' demographic characteristics (sex, date of birth and marital status) were asked only of new cohabitants or people for whom this information was missing. For more details on this part of the interview, refer to SLID Research Paper 95-04. This document will cover only the income interview.

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). The interview on income is only conducted,

however, with people age 16 or over on January 1, 1995. In May 1995, only cohabitants already identified in the January 1995 interview (new members in January 1995) were questioned about their 1994 income (if they were 16 or over). New cohabitants (who had been living with longitudinal persons since the January interview) will be questioned about their work experience and income in 1996 only. SLID Research Paper 94-01 covers the SLID “following rules”.

## 4.2 INCOME INTERVIEW

Before answering the first question on the income interview, the interviewer chose the person for whom the information on income would be collected. 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.**

The list of people in the household appeared on this screen. The people in the household at the time of the labour interview who had since left the household for whatever reason (deceased, moved, divorced or separated) were identified by the notation N/A (not applicable) next to their name. These people were not available to respond to the interview for the other members of the household. The people who had joined the household were 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**

**DOES [respondent] GIVE PERMISSION TO STATISTICS CANADA FOR  
SLID TO USE HIS/HER TAX RECORDS INSTEAD OF ASKING  
INCOME QUESTIONS?**

Yes	Go to INC_Q2A
No	Go to INC_Q3
Does not file a tax return	Go to INC_Q3

**INC\_Q2A**

**End of interview for this person.**

**Interviewer: Press <Enter> to continue.**

This screen allowed the interviewer to return to INC\_Q2 by pressing <F7> where respondents changed their mind or if the interviewer made a mistake.

**INC\_Q3**

**DURING 1994, WHAT WAS [respondent]'S INCOME FROM THE  
FOLLOWING SOURCES?**

If the form had been filled out, question INC\_Q3 did not have to be asked for each item, except the confirmation of total income and total income tax paid if the respondent had not filled out this item.

When the respondent had not filled out the form, the interviewer had to ask whether income had been received from each source on the form. Question INC\_Q3 was presented on two screens. The interviewer could easily switch from screen to screen. The long form of items appeared at the top of the screen, where the respondent's name was also entered. In the left portion of the screen, items 1

to 14 (short form) appeared on the first page of the questionnaire and items 15 to 25 as well as the total income and tax paid appeared on the second page. 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. All error messages appeared in this window as well as the help function (<F1>) for each item, and the calculator. The list of income items was as follows:

- 1- Wages and salaries before deductions
- 2- Farm self-employment net income, including farm program payments and rebates, Canadian Wheat Board payments, crop insurance, etc.
- 3- Non-farm self-employment net income, including business, professional, commission, fishing and net income from roomers and boarders
- 4- Interest on bank accounts and other deposits, savings certificates, Canada Savings Bonds and other bonds
- 5- Dividends (taxable amount)
- 6- Taxable 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 or repayments)
- 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 commissions, tips, retiring allowances, severance pay, scholarships, life insurance settlements, lottery winnings, inheritances, income from outside Canada, etc.

Total 1994 income

1994 income tax (federal plus provincial)

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 specify the amount received, the interviewer asked him to specify the source of this income. This year, when the interviewer input an amount for one of these items, a list appeared. The interviewer simply had to choose the source of the income or type in the answer if it did not appear on the list. The interviewer's job was facilitated, the interview progressed more quickly, typing mistakes were eliminated, and this facilitated coding of these answers during processing.

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

- NCARP/COD moratorium
- Training allowance from federal or provincial governments
- Cash property tax reductions and rebates
- Regular payments from provincial automobile insurance plans
- Payments under the Quebec Program for Older Worker Adjustment (POWA)



- Québec Maternity Allowance
- Don't know / refusal
- Other (specify)

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

- Tips and commissions
- 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 / refuses to give source
- Other (specify)

Following the questions on income (only for people who were interviewed) a question designed to facilitate the tracking of respondents if they moved asked for confirmation or the name of a contact person in the event the interviewer had difficulty reaching the respondent for the next interview.

**END\_INC\_Q1**

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

If no name had been 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 TO HELP US CONTACT [respondent].**

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

**END\_INC\_Q3**

**IN A PREVIOUS INTERVIEW, WE COLLECTED THE NAME OF A FRIEND OR RELATIVE WHO WE COULD CALL IN CASE WE HAD DIFFICULTY REACHING [respondent]. I WOULD LIKE TO CHECK THAT THIS INFORMATION IS CORRECT.**

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 already provided a name (the information collected appeared in the screen).

#### **4.3 EDITS**

Four 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 popped up. The message was for the interviewer alone and was worded as follows: "THIS AMOUNT APPEARS TO BE RATHER UNUSUAL. ARE YOU SURE?". The message appeared when the amounts entered were outside the range shown below, which was determined using data collected in last year's SLID income interview). This range excludes 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	150,000
3	Non-farm self-employment net income	-5,000	100,000
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	22,000
12	Social Assistance and Provincial Income Supplements	300	25,000

	<b>Description</b>	<b>Minimum</b>	<b>Maximum</b>
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	40,000
20	RRSP withdrawals	500	20,000
21	Alimony, separation allowance, child support	800	25,000
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)		
27	Income tax (see 4.3.4)		

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

The second type of edit was a comparison of the information collected during the January 1995 labour interview with the information collected in May 1995. Information collected in January indicated that the respondent had received amounts from one of the sources mentioned and should report income in May. By reminding the respondent that he/she had reported receiving unemployment

insurance benefits during the previous interview, for example, the interviewer increased the probability that the respondent would report an amount.

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, the following error messages appeared.

BASED ON OUR JANUARY INTERVIEW, WE THOUGHT WE WOULD GET AN AMOUNT FOR [type of income]. DID WE MISS IT?

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

Another error message for the interviewer popped up when a respondent under the age of 60 (born on or after December 1, 1934) reported an amount for item 9 (Old Age Security Pension, Guaranteed Income Supplement or Spouse's Allowance).

The message was worded as follows:

"NORMALLY THIS TYPE OF INCOME IS PAID ONLY TO PERSONS AGED 60 OR OVER. COULD THIS BE INCOME FROM ANOTHER SOURCE?"

**4.3.3 Total income check**

The third type of check related to total income. This check verified the amounts entered by the interviewer. When the interviewer reached the item showing 1994 Total Income, a message appeared to indicate whether the respondent had given

the answer “don’t know”, had refused to answer certain items, or had given no amount to any item.

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 enters “Yes”, the calculated amount is transferred to the “Total income” line.
- b) If the interviewer enters “No”, the following message appears:  
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).

When the respondent answered “don’t know” or refused to state a source of income and reported 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:

“Note that the total given by the respondent could include amounts for refusals and “Don’t know”.”

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

The following message appeared, intended for the respondent:

CAN YOU GIVE AN ESTIMATED AMOUNT OF YOUR 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 total given but income received
  - C no income
  - C don't know if respondent received income or not
  - C refusal to income interview

**4.3.4 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 \$30,000 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] HAS REPORTED A TOTAL INCOME OF XXX \$ AND HAS NOT REPORTED PAYING INCOME TAX. DID WE FORGET IT?

THE AMOUNT REPORTED FOR INCOME TAX IS RATHER HIGH COMPARED TO YOUR TOTAL INCOME. I ENTERED \$XXX.. DID I GET IT RIGHT?

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APPENDICES

- 1 1994 Income questionnaire
- 2 Respondent newsletter

FOR INFORMATION ONLY



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

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

Confidential when completed



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

Français au verso

**Your Choice**

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

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

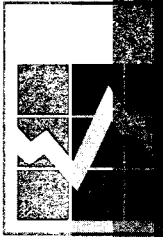
- For more information, refer to the Newsletter.
- Keep this form until your interviewer calls.
- DO NOT MAIL THIS FORM.

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

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

Thank you for your cooperation

## NEWSLETTER



SURVEY OF

Labour

AND

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

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

**A new way!**

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

**Thanks again!**

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

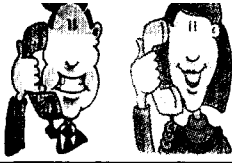
Sincerely,

Director, Prairie Region



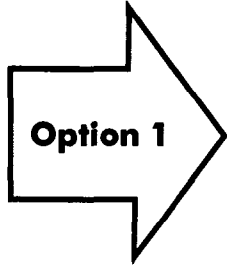
Statistics Canada  
Statistique Canada

Canada



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

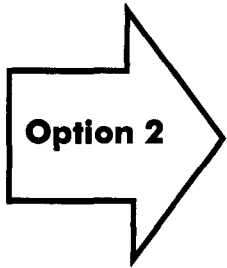
Everybody in your household has a choice. To make it easier for all of you, each person 16 and over has a personalized form. Please show this newsletter to others living with you, give them their income form and ask them to mark their choice. When you are contacted, let the interviewer know everyone's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



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

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

**OR**



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

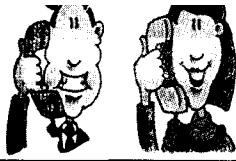
Mark the second box on the form and please take a few minutes to enter your amounts on the form. The last two pages of the newsletter will help you. Then wait for an interviewer to contact you to complete the interview.

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

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



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



## Why income information is important

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



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



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



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



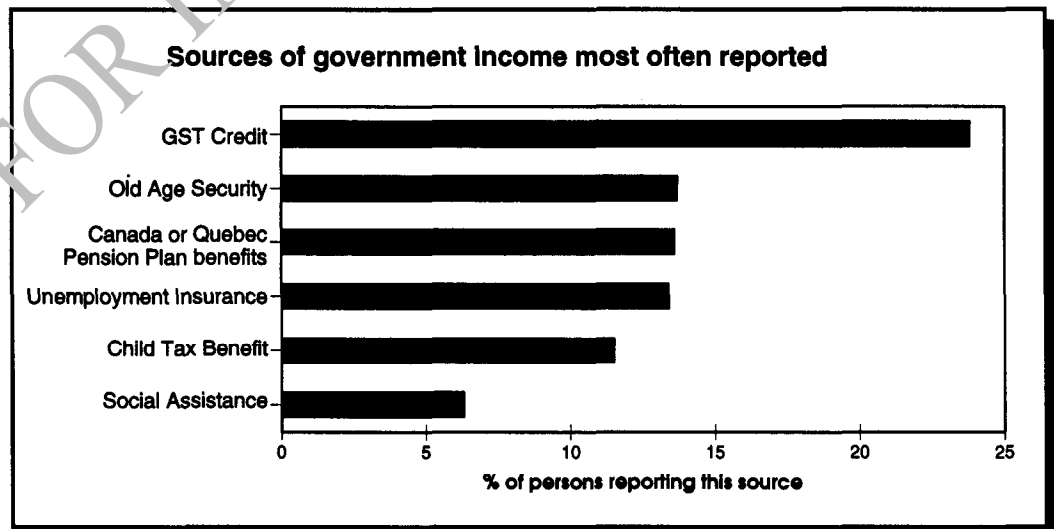
How many of them retired during the year? How old were they when they retired? How did it affect their income?

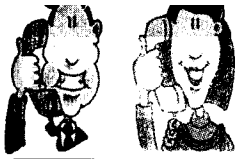


Many of you reported at least one source of government income.



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





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



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



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

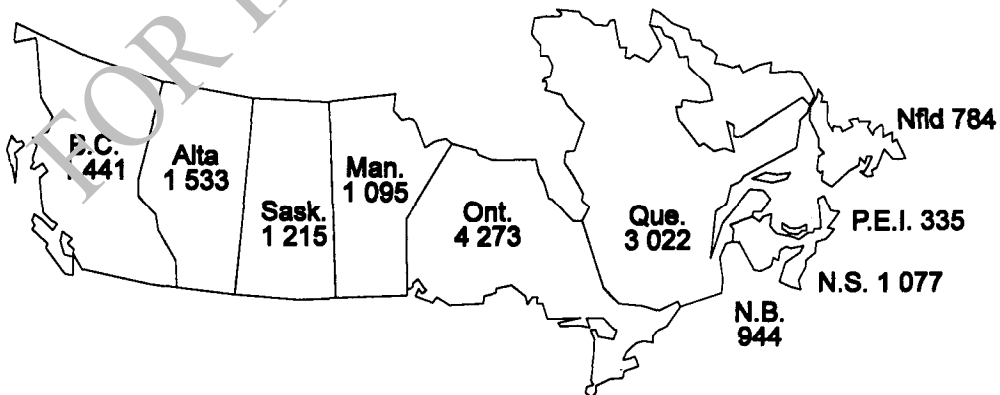


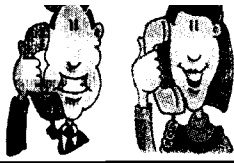
Did they find a job related to their studies? How long did it take them? As new workers, what is their income level?

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

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

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





## More Help to Complete the Form

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

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

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

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

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

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

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

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

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

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

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

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

- *Line 120.*

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

- *Line 127.*

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

- *Line 126.*

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

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

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

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

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

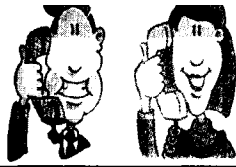
- retirement
- disability, including benefits for dependent children
- surviving spouse
- orphan's benefit
- *Line 114.*
- *Report retirement pensions from company or union-sponsored plans in item 18 or, if received from outside Canada, in items 23 to 25.*

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

- *Line 119.*

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

- *Line 145.*



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

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

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

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

#### *Québec residents only:*

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

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

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

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

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

Please specify the source of this income.

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

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

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

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

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

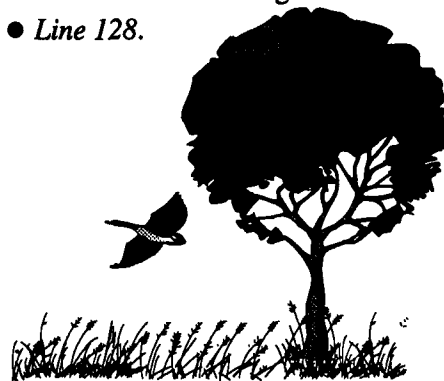
### **20** RRSP withdrawals:

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

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

Include benefits received under a court order or written agreement.

- Line 128.



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

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

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

Please specify the source of this income.

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

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

Report federal and provincial tax payable on your 1994 income.

#### *All provinces except Québec:*

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

#### *Québec residents only:*

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

