

NOTE

COMMUNICATION FROM THE DEPARTMENT OF EMPLOYMENT MAY 2, 1986

"Diary Codes

Expenditure shown in diary records covers cash and cheque payments only. Each diary code may occur for any spender in the household. The code may also occur in both weeks of record keeping and more than once within one person's weekly diary record.

Diary expenditure is aggregated into a personal product code which in turn becomes part of the household product code eg the value of code 122P for each spender forms part of code 373P

When we take on budgets onto the computer the procedure adopted to work out the weekly figure is as follows:-

- (a) All diary record books are punched separately for each week.
- (b) The computer divides the value of each item for each week by two and then sums the total for each individual item thus reducing all values to weekly equivalents.

I can also confirm that this is the standard procedure and that the data for all previous years including the year 1977 was recorded on the same basis."

QUALIFIER VALUES TO BE ATTACHED TO ITEM CODES 1988

ANNEX

The qualifier character for 1987 to identify variations in recordings of item codes will use the values listed below

NB in 1987 'C' Schedule is included within 'D' Schedule

*Changes before
1987 & 1988*

QUALIFIER VALUE	VALID ON (SCHEDULE)	DESCRIPTION	NOTES
00/BLANK	A,B,C & D	Item of Expenditure	-
01	D	Self supply goods	-
02	D (Page 40)	Item of expenditure claimed as refund against business expenses	(1) Used to abate recordings specified elsewhere for the same item code
03	D (Page 40)	Winnings from betting	-
05	<i>D</i>	<i>Carpet items over £50.</i>	
06	D	Item acquired, during record keeping period, by credit card (apart from grocery, food, alcoholic or soft drink items brought home)	(1) See 4 above (2) See 8 below
07	A,C,D	Item of expenditure claimed as a refund against business expenses (dealt with manually). Information not shown on page 40	-
08	D	Items of grocery, food, alcoholic or soft drinks brought home, acquired using credit card during record keeping period	(1) See 4 and 6 above
09	A,B,C & D	Item of expenditure ignored, for an unspecified reason	(1) Always print a warning
10	D	Item acquired, during the record keeping period, by charge card (apart from grocery, food, alcoholic or soft drinks items brought home).	(1) See 11 below
11	D	Items of grocery, food, alcoholic or soft drinks brought home, acquired using charge card during record keeping period.	(1) See 10 above
12	<i>D</i>	<i>Interest on Credit Card accounts</i>	<i>Included in "Services" expenditure</i>

1988 FAMILY EXPENDITURE SURVEY CODING AND EDITING INSTRUCTIONS

HOUSEHOLD SCHEDULE

FRONT PAGE

Reference number

The reference number consists of the Area, Serial and Household numbers. Check that THIS IS THE SAME AS ON THE PINK E FORM AND THE OUTSIDE OF THE BUDGET COVER. Resolve any discrepancies. Where there is only one household at the address (see Q12) the household number should either be blank or contain zeros only. At a multi-household address, all schedules for that address should be coded together. Check the top left corner of the outside of the budget cover to see how many households have co-operated and how many households there are at the address. At present a maximum of 3 households are selected for interview at any one address, the first selected being household number 01, the second 02 and the third 03.

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Date of interview and starting date of records

Check that each of these have been entered. Check that the starting date of record agree with that on the pink E form and that the date of interview with that on the front cover. If there is more than one date against either, ensure that the latest date is entered.

Local Authority Code

The name of the local authority where the interview was carried out appears on the E form. Enter the code relating to this local authority from Appendix A in Office Use Box in the top right hand corner. Appendix A is a confidential document and no information from it should be passed outside OPCS.

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APPENDIX B

Household - definition

A household comprises one person living alone or a group of people living at the same address having meals prepared together and with common house-keeping provided that:

- i. All persons in a household consider the address to be their only or main residence ('main' as defined by the informant). Absent members who consider the address to be their main residence are included:
- ii. All persons share at least one meal a day when in residence.
- iii. The household has exclusive use of at least one room.

All these conditions must normally be satisfied but if two people share one room and neither has the exclusive use of at least one other room, they should be treated as one household, even if they do not share any meals.

Also include as members of the household:

- a. Visitors staying temporarily and others who have been in the household for only a short time, provided they will be staying with the household for at least one month from the date of interview.
- b. Children 16 or over normally away at an educational establishment for educational purposes, spending the holidays at home and who are at home during the entire record keeping period.
- c. Children under 16 away at boarding school but normally spending the holidays at home (whether at home or at school during the record keeping period).

Head of Household - Definition

The definition is identical to that given in the Interviewers' Handbook but it applies to the household as defined above. The HOH must be a member of the household and is, in order of precedence, the husband of the person or the person who:

- a. owns the household accommodation, or
- b. is legally responsible for the rent of the accommodation, or
- c. has the household accommodation as an emolument or prerequisite, or
- d. has the household accommodation by virtue of some relationship to the owner, lessee, etc. who is not, himself, a member of the household.

Notes:

1. In the case of a married couple, where both are members of the household, the husband is the HOH, even if the wife owns the property. (Include common-law husband).
2. If the husband is not a member of the household, but the accommodation is in his name, his wife is the HOH; (but note coding of head of unit and wife of head at Q9).
3. If two members of different sex have equal claim the male is to be taken as HOH.
4. If two members of the same sex have equal claim, the elder is taken as HOH.

Household Box

The household box needs to be fully checked and coded. Since so much of the schedule refers back to sections of the household box, eg sex and age current full-time education, it is essential that this section is correct before it is sent for keying.

The FES definitions of household and head of household (HOH) are given in Appendix B. If there is any indication from notes either on page 1 or page 65-67 of A Schedule that a person should not have been included in the household, or any notes about a person who has been excluded, refer to your supervisor.

Where there are more than 10 people in the household, details of the extra members should have been entered on a second front page. This sheet should be attached to the original A schedule and marked in red, "continuation sheet". Amend person numbers to 11, 12, 13 etc.

Ensure that all codes to be punched have been ringed, this includes person number, age, relationship to HOH, age at which continuous full-time education was completed and benefit unit.

Note Person 1 is always the head of household. If this is not the case or it is necessary to change the HOH then ensure that all person numbers are amended through the Schedules.

Question 1 - Person Number

Check that the person number of each household member has been ringed. Where a continuation sheet has been used, check that the person numbers have been changed to 11, 12, 13 etc.

Editing

It is not possible to amend the Person Number on the print-out or on K1. If any amendment is necessary then refer to supervisor.

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Question 2 - Relationship to HOH

All members of the household should have been listed here. Check the household composition and refer to your supervisor any cases where the HOH appears to be unusual eg

- a. The household consists of HOH (aged 92 and senile), Son, Daughter-in-Law, Grandson and Grand-daughter.
- b. The household consists of HOH (female aged 30), Sister (aged 35), Brother (aged 40)

In both these examples the interviewer should have established "in whose name the accommodation is owned or rented", and called this person the HOH. The person entered as HOH should usually be accepted, but where it seems that another person is actually the HOH, refer to your supervisor. Any change made to the HOH must be based on information given not on guess work.

Code Relationship to the HOH from the frame below. Single code only

HOH	0 (precode)
Wife or husband	1
Son or daughter (incl. stepson/stepdaughter)	2
Son-in-law or daughter-in-law	3
Father or mother	4
Father-in-law or mother-in-law	5
Brother or sister	6
Grandson or grand-daughter	7
Other relative (eg niece, nephew, brother-in-law, sister-in-law)	8
Other non-relative (including foster children)	9

Ring code 0 which is preprinted on the schedule. Enter and ring the codes in the "Office Use" column (Q2) in line with each applicable person.

Foster children: Code 9 applies if a regular maintenance is received from the local authority (see Q70 (a) - B schedule). Where a local authority allowance is not received and the relationship falls into a group covered by codes 2,3,6,7 or 8, this takes precedence over code 9. See also Q9 (paragraph on 'foster children')

Adopted children: These should be treated as own children and code 2 entered. If legal adoption is going through but has not been finalised, treat as own children unless the parent is in receipt of a local authority allowance for the children (see Q70 (a) - B Schedule) in which case treat as foster children (code 9).

Cohabiting: If two people of opposite sex living together describe themselves as husband and wife, then they are accepted as such with a married marital status and members of the same benefit unit. If described as 'fiance', 'girlfriend', 'boyfriend' etc then the relationship should be 'other non-relative' (code 9), their true marital status should be entered and they will be members of different benefit units.

Note Where two people cohabiting are receiving benefit as a married couple then they should be coded as such. If in doubt refer to supervisor.

Editing

Any codes of 8 or 9 will be printed out at editing stage for checking to see whether they can be reclassified into any of the other categories.

There will be various edit checks between relationship, marital status and benefit unit. Check thoroughly that the information given is correct. Any change made to any of these columns must be based on the information given not on guesswork.

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Question 3 - Contribution by a non-relative

Check that code 1 is ringed against each non-relative who contributes regularly to rent, rates or other household expenses.

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Question 4 - Sex

Check against the description at Q2 to ensure that each person has been correctly coded to male or female.

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Question 5 - Age

Check that an age has been given for each person. Estimated ages can be accepted. Where the age is less than 12 months, delete the original entry and enter 0. If the informant is aged 100 years or over, recode to 99. Ring the age.

Question 6 - Marital status

Check that only one of codes 1-3 is ringed for each member of the household.

Code 1 applies where both husband and wife are members of the household even if one is absent at the time of the interview. See Appendix B for household definition.

Code 2 applies to any married person whose spouse is not a member of the household because he or she has a main residence elsewhere. A wife coded 2 at Q6 should always be coded 2 (wife of head of benefit unit) at Q9.

Code 3 applies to all persons who are single, widowed, divorced or separated (either legally or not) irrespective of age.

Common law marriage: Where the informants call themselves married, accept as such. See Q2 (paragraph on 'cohabiting').

Question 7 - Current Full-time education

Where Q7 applies check that only one of codes 1-9 has been ringed. Always refer to Q4 when checking this question to ensure that the type of school/education/institution is consistent with the age of the household member. In particular note that a student attending a private commercial college (i.e. where fees are paid) eg Pitmans/Clarks should have been coded 7 if under the age of 16. Code 6 should have been ringed if aged 16 or over.

Check also any entries covering full-time education of members of the household at Qns. 110, 111 and 112 against the coding at this question. If the payments made for fees, descriptions of grants, etc do not seem to agree with the coding at Q7 refer to the supervisor. (But note that fees for a household member could be paid by someone outside the household, and also that Questions 111, and 112 refer to the last 3 months, whereas the current situation is coded here - Q110 does refer to the current situation).

In the absence of any notes or further information, the code ringed at Q7 should be accepted. If the interviewer has noted the name of a school and/or queried the code, refer the schedule to the supervisor. (do NOT code on a name of school as this can be misleading, eg a school described as "Grammar" or "High" may be a state school (code 5) or an independent school (code 7)).

Notes 1. Children under 5, coded as receiving full-time education

A child under 5 years will normally be coded 1 at this question but occasionally one may be coded 2, 3 or 7. This should be accepted unless the child is attending a day nursery/play group and not a primary or nursery school. The type of education received should be decided by whether the word "school" is mentioned if recorded in the D books or Q.112(b). Nursery classes and schools and playschools count as primary schools but day nurseries and playgroups do not. Children can attend nursery schools from the age of 2. If there is no reference elsewhere in the schedules, the entry at Q7 should be accepted.

2. Apprentices should not be coded as receiving full-time education.

3. Students on sandwich courses. When a person spends approximately half the year as a full-time student and the rest of the time as a full-time worker, code according to the position at the time of interview.

4. Full-time students who are also working

The appropriate education code should be ringed for any full time student who is also currently working, (eg part-time work during term, or a vacatic job) provided that he/she intends to return to the higher education establishment the following term.

5. Middle school - treat as Secondary (Code 5) if aged 11 or over, otherwise as primary, code 3. If private or independent then code 7.

6. Code 8 (University) includes students who are either waiting to go up to University or waiting for the results of "A" levels before going up to university.

7. Children who are between schools (eg interviewed during summer holidays) code the type of school they will be attending next term.

8. Codes 6, 8, 9

Note that the code to be entered here is that which relates to the type of establishment being attended. So code 6 includes sixth form tertiary further education colleges, colleges of technology, code 8 covers universities only and code 9 polytechnics, colleges of art, teacher training.

Editing

The types of education will be checked against the age of the respondent. Check that the age and type of education is sensible, if there appears to be an error amend the type of education not the age (unless there is conclusive evidence that the age is wrong).

Question 8 - Age at which continuous full-time education completed

Check that an age or a dash has been entered for every household member.

Where the person is under 16, or where he/she is sixteen or over but has continued to be in full-time education, the coding column will either be blank or contain a dash.

For all people who are no longer in continuous full-time education or who have left education but returned to full time study, an age should have been entered. Ring the age. Ignore fractions. Do not ring dashes.

- Note
1. A person aged 16 or over in full time education with an age entered at Q8 should be assumed to have returned to full-time education after a break. Do NOT delete the age.
 2. Where an age has obviously been omitted, eg male aged 45 in full-time employment, leave the coding box blank. There is no referral back on this question.
 3. Estimated ages can be accepted.

Editing

An allowable range has been set up for this field of 14-25. Anything outside this range will be printed out as a warning message to be checked. If age appears to be correct then no action is necessary.

Question 9 - Benefit Unit, Position within Benefit Unit and DES Benefit Unit

1. Benefit Unit (1st OFFICE USE column)

Each household should be divided up into benefit units. A benefit unit may consist of:-

- a. A married couple with dependent children
- b. A married couple with no dependent children in the household
- c. A man or woman without wife/husband in the household, but with dependent children.
- d. One person only ie a man or woman without wife/husband in the household with no dependent children.

Where there are children in the household they should be treated according to their age and relationship to the HOH as follows:-

1. Children under 16 years should always be coded as part of their parents' benefit unit provided the parents are in the household, otherwise they should be coded as part of a responsible adult's (normally the HOH's) benefit unit.
2. Children aged 16 years or over but under 19 should be coded as separate benefit units unless they are living at home and receiving full-time non-advanced education (coded 4-7 at Q7) in which case they should be coded as part of their parents' benefit unit.
3. Children aged 19 years or over but under 25 should be coded as separate benefit units.

When all the benefit units in the household have been established, check that each person in the same unit has been given the same reference number ie all members of the HOH's benefit unit should be coded 1, and all members of any 2nd, 3rd etc units should be coded 2, 3 etc. Enter the reference number in the first office use box in column 9 and ring this number. Refer any doubtful cases to the supervisor.

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2. Position of each member within the benefit unit (2nd OFFICE USE column)

i. Head of each unit should be coded 1.

Code 1 includes.

a. Children aged 16 years but under 19 who are not receiving full-time non-advanced education.

b. Children aged 19 years but under 25.

ii. Wife of Head of the unit should be coded 2.

A wife will always be coded 2 if she is coded 1 or 2 at Q6 (marital status) ie whether her husband is a member of the household or not.

A woman who is single, widowed, divorced or separated (coded 3 at Q6) and is head of her own benefit unit will be coded 1 in this column.

iii. Young dependents under 19 should be coded 3.

Code 3 includes.

a. Children aged under 16 years.

b. Children aged 16 years but under 19 who are receiving full-time non-advanced education (coded 4 to 7 at Q7).

Foster children

Foster children who are covered by a local authority maintenance grant (See Q70(a)- B Schedule) are regarded as being the head of their benefit unit and will be coded 15 in the first OFFICE USE column and 1 in the second. Each foster child in the household should be coded in the same way.

Foster children who are not covered by a local authority maintenance grant should be included in the same benefit unit as their foster parents.

3. DES Benefit Unit (last OFFICE USE column)

This code identifies the parents of student benefit units.

If the head of a benefit unit (usually the HOH) has a child living at home who is:

- EITHER - aged 16 years but under 19
- receiving full-time higher education
 (coded 8 or 9 at column 7)
- and therefore coded as a separate benefit unit
- OR
- aged 19 years but under 25
- receiving full-time non-advanced or higher education
 (coded 4 to 9 at column 7)
- and therefore coded as a separate benefit unit.

then enter and ring 1 in the father's box in the last OFFICE USE column or in the mother's box if she is the head of her benefit unit (ie if the father is not a member of the household).

If the parents are not in the household enter and ring 1 against a responsible adult, this will usually be the HOH.

Example

If the father's benefit unit number is 1 and he has a 20 year old son at university whose benefit unit number is 2, enter and ring 1 in the father's box in the last column. If there is another unit with a relationship like this in the household enter 2 and so on.

Question 10- Spender

Check that Code 9 is ringed for each spender in the household.

A spender is any member of the household who has passed his/her 16th birthday (ie the definition depends on age and NOT whether the person has an income or spends money).

A non-spender, ie. someone who is mentally incapable or senile, will be coded as a spender and column 11 will also be ringed. In these instances nil expenditure sheets will need to be entered in the place of diaries.

Do not enter a nil expenditure sheet for an absent spender.

Editing

If anyone is an absent spender then Qs10 and 11 will be blank.

An absent spender includes anyone living and working away from the household at present (whether in or outside the UK), someone in hospital for the record keeping period or someone on holiday and away from home for the record keeping period. (See also Q1 (code 7) and Q70-71 - B Schedule).

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Question 11 - D record received

Check that code 1 is ringed for each spender in the household. If not ringed check to see if a diary is present for that spender and ring if necessary. Refer to supervisor any cases of a missing diary without any reasons given.

If the diary that is present, has no expenditure in it, insert a nil expenditure sheet. Do not enter a nil expenditure sheet for an absent spender.

HOUSEHOLD SCHEDULE

PAGES 2-64

With the remainder of the household schedule it is not necessary to check in detail. For instance, continuity and consistency will be covered by computer checks and therefore can be corrected at the editing stage. There are some questions, like the household box, that are referred back to regularly so it is essential that they are correct from the start otherwise they will cause considerable extra work at the edit stage.

The following manual checks must be carried out at the coding stage.

1. Legibility: Check that all figures, both your own and the interviewers, are clear and unambiguous. It is very easy for badly written figures to be mis-punched which can cause problems at later stages.
2. Interviewers notes It is very important that all interviewers notes are read carefully and that any action that is necessary is taken. If this means changing data in the coding column then indicate why this change has occurred.
3. Column and line numbers: Check that all column and line numbers have been ringed wherever there are entries in a grid. Where an entry has been deleted from a grid, or the interviewer has missed a line (or column) it is not necessary to amend the item numbers so that they run consecutively.
4. Person numbers: Check that all person numbers are correctly entered. Only one person number per column/line is allowed. If joint account, credit card etc., enter the second person in another column.

Payments covered by an organisation or person outside the household

1. Bills paid directly by an employer or an organisation for whom the informant does unpaid work should not appear anywhere as expenditure or refunds on any of the schedules.
2. Bills paid directly by a private individual should not be shown as expenditure but should be shown at Q122, A Schedule.
3. Expenses paid by Supplementary Benefit, with the exception of rent, should be shown as expenditure in the A or D Schedule and also as income at Q56(d), B Schedule. Bills paid directly by Local Authority Social Services Department should not be shown as expenditure.

Question 12-16 - Accommodation

Definitions

1. Address: This is the address sampled from the postal address file and it can cover a whole building, a flat in a purpose - built block of flats, or flat/rooms in a converted house. A house which has been converted into 2 or more flats may be sampled as a complete building, in which case the address covers all units of accommodation in that building. In a similar converted house one flat only may be the sampled address, in which case that particular flat is the unit of accommodation and households in other flats should not be interviewed.

2. Rateable Unit: This is a flat (purpose built), group of houses, a whole house, or part of a house which is assessed separately for rating purposes. In most cases the address and rateable unit will be the same. In some cases the sampled address will cover more than one rateable unit, and in other cases the sampled address may be only part of a rateable unit.

A full description of the rateable unit covering the household is given at Q 126 and the number of rooms occupied by other households in the rateable unit is given at Q15.

3. Accommodation: This is the total number of rooms (including rooms used solely for business purposes) which the household either owns, rents or occupies rent-free, irrespective of whether any part is sub-let or not.

Editing

If answer to Q12 or Q15 is 'Yes' the budget will appear on the printout. Check carefully to see whether GRV and NRV (at Qs 124 and 125) need abating. Also other questions such as rates and water rates payment may also need abating. When abatement is carried out because of multi households or rooms not part of the domestic accommodation, it should be done on the basis of number of rooms used by household as a proportion of rooms in the rateable unit. Shared rooms count as 1/2 a room if shared with one other household, 1/3 room if shared with two other households etc. Any abatement for multi-household accommodation should be carried out before any business expense abatement. All multi-household abatements are to be carried out on form K1.

At edit stage any answers shown as 'other rooms' will be printed. Check to see whether any rooms here can be reclassified into one of the other categories. Examples of rooms that should be reclassified are box rooms, attic bedrooms (both to bedrooms), sun lounges, conservatories (provided they are used throughout the year) (both to living rooms). Rooms to leave as other rooms include cellars, utility rooms, shower rooms (unless the accommodation does not have a bathroom), rooms less than 6 ft square, rooms/attics without a window/skylight.

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Sub-let Property

When informant sublets part of his property but pays rates on all of it, his rate payment must be abated in proportion to the number of rooms sublet, (see notes at Qs124-125) on the assumption that the rent paid by the sub-tenant will include an amount for rates. This same amount must also be subtracted from the rent received at Q68 'B' schedule of the informant. The rent payment shown in the sub-tenant's schedule will not be abated.

If, however, the sub-tenant pays his rates to the informant separately from his rent, abate the informants' rates questions only. In other words, rents, rates and rateable value shown on the tenants' schedule should be deleted from the informant's schedule.

If the sub-tenant does not pay rent or rates (eg a mother living in her son's property) the total rates should be coded on the sub-letting informant's schedule and none on the sub-tenant's schedule. However, NRV is still proportioned between the sub-letting household and the sub-tenant.

When rates are abated, it should be all rates that are abated ie domestic, water and sewerage.

The abated values to be entered on K1.

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Question 17 - Tenure

It is important that Qs 17(a) - 17(c) are correctly coded. The question applies to all households. Check that one of the codes X, Y or Z has been coded and that the correct signposting to part (a) (b) or (c) has been followed. If the question has not been answered then check the answers to Qs 17A-39 for some indication of the correct coding to be applied. If in doubt refer to supervisor.

Question Q17(a) - Accommodation rented

Questions applies if coded X at main. Check that one of codes 1-4 is ringed.

Code 1 includes Scottish Special Housing Association, Northern Ireland Housing Executive

Code 2 includes all other housing associations

Codes 3 include charitable organisations and housing trusts.
and 4

If a property goes with the job of anyone in the household but rent is being paid for that accommodation it should always be coded 3 or 4 even if it is a council property eg shops, school caretaker's accommodation, farm rented from the council. This is because the accommodation, when it is vacated, will not be available to those on the council waiting list. This does not apply where council property is rented and one room is used solely or partly for business (eg insurance agents).

Question 17(b) - Accommodation owned

Question applies when coded Y at main. Check that code 5 or 6 has been ringed. If not answered check Qs 30-39. If Qs 30-39 are answered then treat as being purchased with mortgage or loan, code 5, otherwise code 6, owned outright. Code 5 includes a mortgage to buy freehold of land on which the house is built, or the purchase of council house where informant is paying both rent and mortgage.

Question 17(c) - Accommodation neither rented nor owned

Question applies when coded Z at main. Check that either code 7 or 8 is ringed. If code 8 is ringed accept at this stage, it will be dealt with at the editing stage.

Notes: 1. Accommodation is treated as rent free if one of the following conditions is satisfied:-

i. Accommodation is provided rent free by an employer, or by an organisation to a self-employed informant, provided that the normal activities of the informant are to further the cause of the organisation. This condition will normally apply to Church of England clergy and other ministers of religion. If the rent paid by the employer is known, ignore the amount paid.

ii. Accommodation is owned by someone outside the household (other than an employer) who provides it rent free.

iii. Accommodation where an unknown rent is paid by someone outside the household (other than an employer) who provide it rent free.

2. Accommodation is NOT treated as rent free if a known rent is paid by someone outside the household who is not an employer.

In such cases it should be treated as rented and proceed as follows:-

i. Q.17 should be recoded X and 3 at (a) unless Council, housing association or "other furnished", when it should be coded 1, 2 or 4 as appropriate.

- ii. If the household is given money to pay the rent and rates:
 - a. enter rent at Q.18, rates at Q.24 etc and follow instructions at those questions.
 - b. enter the total amount received as income at Q121.
- iii. If the household's rent/rates bills are paid directly by someone outside the household,
 - a. do not show rent/rates at Qs 18 and 24
 - b. show total amount paid on the household's behalf at Q122.

Editing

Any households coded 7 or 8 will be printed to check whether any of the other categories apply. See the notes above for the definition of rent free.
If code 8 has been ringed refer to supervisor.

Question 17A-29 - General notes on housing benefits

Housing Benefits

Under the Social Security and Housing Benefit Act 1982, local authorities are required to operate schemes for granting rent rebates to council tenants, and rent allowances to private tenants (including occupants of shared or hostel accommodation in furnished or unfurnished accommodation. These schemes, together with the rate rebate scheme, are known as the Housing Benefit Scheme. The schemes operated must be no less generous than a nationally formulated scheme but authorities have discretion, within certain cost limits, to make their schemes more generous if they wish.

Similarly, under the above mentioned act, councils are required to operate a rate rebate for people who pay rates for their home. This includes owner occupiers, council tenants and private tenants. A rating authority can draw up its own scheme provided that it is no less generous to anyone than the statutory scheme and that its total costs are not more than 10 per cent greater than that of the statutory scheme.

People on supplementary benefit are automatically entitled to housing benefit to cover 100% of their eligible rent and rates, less deductions if there are non dependents living with them. They are also entitled to a 100% rebate on amenities such as heating and lighting if these are included in the rent. If an informant in rented accommodation is receiving 100% rent and rates rebate the information will appear at Q17A for council tenants, and at Q17(c) for private tenants. If these figures include rates as well then the rates element will be shown at Q25(a) (i)-(iii). If receiving only a partial rebate, the rent element will be shown at Q18 and the rates at Qs25-26. Finally for owner occupiers who are receiving a rates rebate, whether this is 100% or partial, the details will be shown at Qs 25-26.

Note change in 1988

From April 1988 there will no longer be any 100% rates cases as all occupiers of property will have to pay at least 20% of the rates on their property (Q17A - page 4A - will be removed from schedule at second print). However, tenants on a very low income or on Income Support can still receive 100% rebate on their rent.

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Question 17A - 100% Housing Benefit

Code CI number and check that the Ref. No. has been entered by the interviewer.

Note changes in 1988

Q17A only applies in the first quarter and the data is given by the informant.

From April 88 100% rates rebate will cease and all renters should answer Q18. Until then transfer relevant information from Q17A as follows. (see also grid below)

Local authority tenants (Q17A (a) and (b)) - Use the Top OFF USE grid on P.3.

Enter 1 or 2 in the first box, the rent in the second box, 1 (if rent not known) in the third box and the period code in the last box. NB - if rent is not known leave the period code box blank.

Non - local authority tenants (Q17A (c)) - Use the bottom OFF USE grid on P.3.

Enter the rent in the first box, 1 (if rent not known) in the second box and the period code in the last box. NB - if rent is not known leave the period code box blank.

After transferring data to page 3 remove page 4A and staple it to the inside of the back cover. If the rent includes rates rebate, do not transfer the rates element to Q25, this will be carried out by the computer.

17A Enter 1 or 2

(a) Enter rent

If rent DK enter 1

Enter period code

		OFF USE

(c) (i) Enter rent

If rent DK enter 1

Enter period code

		OFF USE

Editing

If the rent is not known accept '1' (DK) and refer to supervisor for an estimate. Imputed amount to be entered on a K2.

Note for supervisors - CIPFA tables to be used in imputing rent.

Jan 88

Question 18 - Rent (For changes from April 1988 - see next page)

From January-March those receiving 100% housing benefit will not be asked this question.

If 'DK' is ringed Q19 should be blank.

Do not abate the rent because of any rent holiday, rent rebate or amount for service that might be included. This will all be done by the computer.

Notes: 1. If the interviewer has noted that rent includes an element for garage whether on the premises or for a garage elsewhere, accept at this question. If shown as a separate payment, at Q29 then delete from there and code in the Diary if paid during the record keeping period. This applies to rent rates paid for a garage.

2. Rent arrears

If shown, the rent arrears should be accepted. However if Q20 indicates that there is a rent holiday this needs to be applied manually but only to the normal rent payment not to the arrears. Carry out the calculation, entering the new figure, in red, at Q18. Delete the rent holiday at Q20(a) and amend Q20 to a 2. Remember that any entries at Q21(a), Q22 and, if relevant, includes rates, Q25(a)(i) or Q26(a) are affected and also need to be adjusted. The factor to be used in any rent holiday calculation is 52 - Rent holiday.

52

Editing

If code '1' (DK) is ringed a print message will appear. Accept code 1 and refer to supervisor for an estimate. Imputed amount to be entered on a K2.

Note for supervisors

CIPFA tables to be used in imputing rent.

Jan 88

Question 18 - Rent (Changes from April 1988)

The wording at the 'DK' part of Q18 will be changed to

Nil (100% rebate on rent)

9

Code 9 will be printed in the box instead of code 1.

If the rates are paid separately a person may still receive a 100% rent rebate in which case code 9 should have been ringed and the rent and period code boxes (Q18 and 19) left blank.

Editing

If code 9 is ringed a print message will appear. Accept code 9 unless there are any interviewer notes indicating that it should not have been ringed.

If both boxes at Q18 are blank refer to supervisor.

Jan 88

Question 21 - Rent rebate

If the rent payment includes rates and there is a rent rebate do not apportion the rebate between the rent and rates rebates. If there are any notes which give a figure for rates rebate then transfer this to Q25, otherwise leave for the computer to apportion between rent rebate, Q21(a), and rate rebate, Q25(a)(i). If the amount or rebate at Q25(a)(i) or Q 26(a) duplicates that at Q21(a) then delete the figure Q25(a)(i) or at Q26(a).

If rebate is deducted from last rent payment (Q21(d) is coded 1) and rent includes rates (Q23 is coded 1) then Q25(a) should be coded 1. If rebate is given back as a lump sum (Q21(d) is coded 2) and rent includes rates (Q23 is coded 1) then Q26 should be coded 1. Check these and amend if necessary.

Editing

If no value is given for Q21(a) when information is required, refer to supervisor for an estimate. Imputed amount to be entered on a K2.

Note for supervisors

'DHSS Housing Benefit Entitlement' tables to be used for imputing rent rebate.

Question 22 - Services included in rent

Editing

The print out will indicate whether the rent includes an element for services or not. If it does check whether the services shown should be included there or not. If the should not then deduct that element from the rent and transfer to the relevant question. Eg. structural insurance should be transferred to Q71.

If the rent includes services and these are the only part of the rent that is paid, then treat as 100% Housing Benefit. Transfer the rent rebate back to Q17A. Delete the services included in rent and code in the Diaries when it appears there. This only applies in the first quarter.

Notes: 1. Some local authorities run a budgeting scheme for their tenants which a proportion of their electricity and/or gas charges are included in the rent payments. Note that these are not the same as the board budgeting schemes run by the electricity and gas boards.

The fuel element, whether it has been imputed or not, should be deducted from the rent (Q18) and from the services included in the rent (Q22). Enter this amount at Q53/63 if there is no entry there already. If there is, assume this is only for hall lighting and heating etc. Enter the period code at Q54/64 and ring code 4 at Q51(a)/61(a). If the rent becomes negative or there is a rent rebate refer to supervisor.

2. If the rent includes an element for TV licence delete this from the rent and transfer to Q76 as an annual equivalent figure.

3. Remember to adjust any precodes when transferring information.

4. If rent holiday applies to any rent payment, adjust the amount of services included in rent to be transferred to another question by the fraction
$$\frac{52 - \text{Rent holiday}}{52}$$

5. Gas/electricity charges included in rent or service charge
(excluding budgeting schemes run by a local authority - see note 1)

1. Heating

If heating is supplied from a central source, as in a block of flats, and it is included in either the rent (Q18 and Q22) or the service charge (Q29) do not delete the amount shown at these questions. This is where these charges should be entered. If the amount is not known leave the question blank - do not impute it. (Note - If heating is included in the rent or service charge it will usually be supplied by gas.)

Check that code 1 is ringed at the relevant box at Q50 ('A' schedule). If the type of fuel is not known then check that code 1 is ringed at the 'DK Fuel' box.

ii. Cooking/Lighting etc

Where the amount is known

If cooking or lighting charges are included in either the rent or the service charge delete the amount shown at these questions and enter it at the questions on electricity/gas supply (Pages 14-15 or 16-17 respectively). Amend the main questions (Q51 or Q61) if necessary. If the charge was included in the rent deduct this amount from the rent payable (Q18 and Q22).

Where the amount is not known.

If the amount is not known (ie. 'DK' has been entered) impute the amount based on current gross weekly household income and enter it at the questions on electricity/gas supply (Pages 14-15 or 16-17 respectively). Amend the main questions (Q51 or Q61) if necessary. If the charge was included in the rent deduct the imputed amount from the rent payable (Q18).

Where the amount is not given and no 'DK' has been entered, refer to R0.

Jan 88

Questions 24-29 - General notes on housing payments

1. Payment not made for rates/water rates at time of interview

Where the informant will be paying rates but has not yet made any payment at the sampled address, leave blank. The rates/water rates due will be calculated automatically and the amount and period code will be entered at the appropriate question by the computer at the imputation stage.

2. Arrears

Where the interviewer has noted that there is a payment of arrears included in the last rate payment, this should be accepted.

3. Dustbin charge

If given separately, add to the rates amount at Q24 on an equivalent period basis.

4. Metered water for domestic purposes only

Accept what is paid at Q28 (b).

5. Pumping water from a well

If it is noted that a payment is made to the Electricity Board for pumping water from a well, this should not be shown at Q28 but added to Qs 51-60 as appropriate.

6. Separate land drainage rates

If land drainage rates are paid separately these should be coded in the Diary if paid during the record keeping period.

7. Cesspit charge

A payment for emptying a cesspit or septic tank should not be accepted at Q27/28. Code as 799 in the Diary when paid.

Question 24 - Domestic rates

Do not abate rates payment because of any rebate that may be included. If the informant receives 100% rates rebate, code the answer to Q24 as 'No'. This only applies in the first quarter.

Editing

If rates data is missing impute rates using K2. Rates are estimated by NRV (Q125) domestic rate poundage. Rates poundages can be obtained from the local authority rates poundage file.

Question 25-26 - Rates rebate

If the informant receives a rates rebate, the rates element only should be recorded at Qs25 and 26. If the informant is unable to split the rates element from any rent rebate then leave Q25(a)(1) or Q26(a)blank. If the informant receives 100% rates rebate/housing benefit, the answer to Q25(a)(iii) will be coded 'After'. This only applies in the first quarter.

If Q21(d) was coded 2 and the rent rebate included rates, the rates rebate will be entered at Q26(a) and Q25(a) will be coded 2.

Editing

At the editing stage complete the Office Use boxes at Q26. A printout will show those households receiving more than one rebate direct in the last 12 months. In these cases enter the last rebate received at the first Office Use box and the related period code in the second box. Amend the amount at Q26(a) to show the amount received in the last 12 months and the period at Q26(b) to that of one year ie. 8.

Question 28 - Water Rates

Editing

If the water rates are not known impute the water rates on a K2 using the formula:

$$\begin{aligned} & \text{NRV (Q125) x (water rate + sewerage rate + environmental rate)} \\ & \quad \quad \quad \text{(poundage \quad \quad \quad poundage \quad \quad \quad poundage)} \\ & \quad \quad \quad + \text{Water standing charge} + \text{Sewerage standing charge} \end{aligned}$$

If the accommodation is not connected to mains water (Q27), do not include water rate poundage or water standing charge in the above calculation.

If the accommodation is not connected to mains sewerage (Q27), do not include sewerage rate poundage or sewerage standing charge in the above calculation.

The poundages etc can be found in the local authority rates poundage file.

If the water rates are paid as part of the rent or as part of the rates, do not impute the water rates.

Jan 88

Question 29 - Other payments made on accommodation

Editing

Any entries here will be printed out at the editing stage. Check that the reason for the amount shown here is valid for this question. Include site rent for caravans.

Services paid for separately by renters should not be shown here. These are coded in the Diary if paid during the record keeping period.

- Notes:
1. If regular maintenance charges include a charge for central heating oil, the amount for central heating oil should be deleted and transferred to an annual equivalent figure to Q50(a)(i). If the exact amount is not known then estimate a proportion for oil based on current gross weekly household income using Appendix C. Enter this amount at Q50(a), using a K2, and deduct an equivalent figure from the amount shown here.
 2. Road charges should not be shown here or elsewhere in the A Schedules. Delete and code in the Diary if paid during the record keeping period.
 3. Delete garage rent and/or rates. These will be coded in the Diary when paid during the record keeping period.
 4. If structural insurance is included in the service charge, this should be accepted.

Questions 30-41 - Mortgages

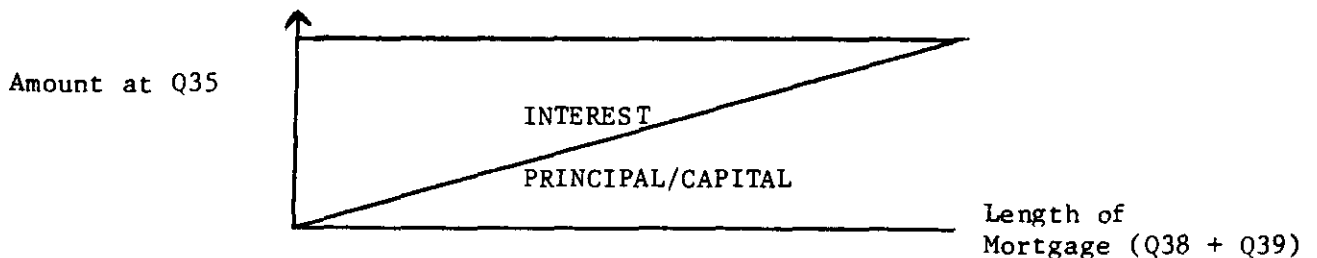
Definitions

Principal/Capital: This is the amount borrowed. For example, a house costing £50,000 with a 90% mortgage would mean that £5,000 is paid as a deposit and £45,000 is borrowed. The £45,000 represents the principal/capital.

Interest: The interest is paid on the amount borrowed over the period for which the amount is borrowed. The interest is paid to the person lending the money.

Interest and principal/capital mortgage

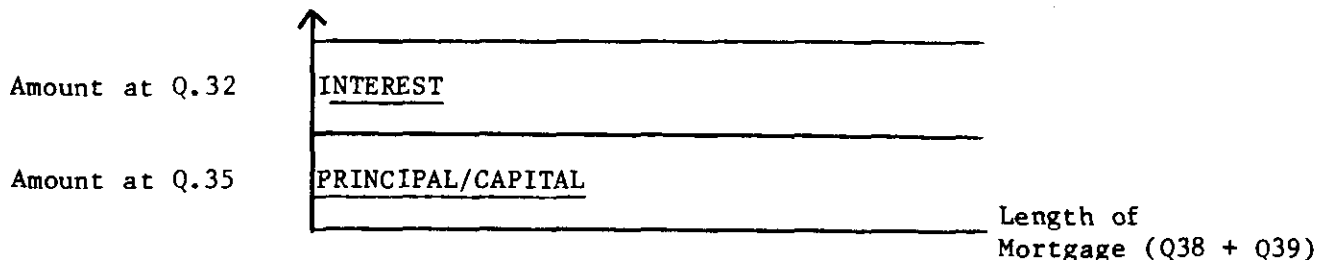
This is the normal type of mortgage taken out from a building society or local authority. At the same time that the money borrowed for the purchase of the house is being repaid, interest charged on the outstanding amount is paid, so that payments in any one year consist partly of repayments of the original loan (the principal) and partly of interest. Both principal/capital and interest are paid to the organisation lending the money. Normally more interest would be paid when the mortgage is first taken out. This would gradually decrease until at the end of the period it is mainly principal/capital that is being paid off.



Interest only mortgage

Where a mortgage of this type is taken out, the "principal/capital" part is in fact normally covered by an endowment policy, premiums for which are paid to the Insurance Company. The interest is normally paid to a Building Society.

When the endowment policy matures, the amount is paid out to the organisation providing the mortgage, not to the person who took out the policy, so that it cancels out the principal/capital (the amount originally borrowed). In other words, until the policy matures, the principal of the original mortgage remains outstanding and the mortgagee pays interest only to the mortgage company plus premiums on the endowment policy to the insurance company.



There are other types of mortgages but these will normally be variations on the above eg. interest only mortgages from a solicitor where the principal is covered by income from stocks and shares that are held by the solicitor as a security, or loan from a relative, friend or employer where no interest is charged.

Jan 88

General notes on mortgages

1. More than one mortgage held for purchase of sampled address: If more than one mortgage is held the source, at Q30, and the coverage of the last payment, Q31, should refer to the largest mortgage. All payments in respect of any mortgages should be entered though. This means that it is possible to have entries at both Q3 and Q35. This will be printed out as a warning message at the editing stage.
2. Mortgage taken out for a purpose other than purchase of the sampled address: If the informant has taken out a second mortgage for house improvement/enlargements, or any other reason, these should not be accepted here but transferred to Q85 (if not already shown there). If this is the only mortgage the informant has then the coding at Q17 should be changed from 5 to 6, and all details at Q30-41 deleted and transferred to Q85.

A mortgage for a second dwelling or a house to be moved into should be deleted and coded in the Diary if paid during the record keeping period.
3. Loans for deposits: where a loan has been taken out for the deposit on the sampled address, this should be treated as a mortgage. (See note 1)
4. Local authority combined rent and mortgage: Where a property is being purchase from a local authority and both rent and mortgage are being paid, the combined payment is treated as the mortgage payment. Code Q30 as local authority, Q17 should be coded 5.
5. Mortgage to an insurance company for an annuity: Owner occupiers aged 70 or over can mortgage their house to an insurance company for an amount of money which then becomes the capital for an annuity. Out of the annuity the recipient pays interest. Code as an interest only mortgage from an insurance company.

Question 30 - Source of mortgage

Check that only one of codes 1-5 is ringed.

Code 1 includes cases where the mortgage is financed by a building society, but an endowment policy is taken out to cover repayment of principal.

Code 3 includes cases where the mortgage is financed by a bank but an endowment policy is taken out to cover repayment of principal.

Code 4 includes cases where an individual receives a loan from an insurance company based on an insurance policy already held.

Code 5 includes private loans, mortgages from Friendly Societies and loans from employers (unless the employer is a building society, local authority, bank or insurance company.)

Hire purchase rental is a method of buying accommodation over a number of years on hire purchase ie a deposit is paid and then monthly rental payments are made for an agreed period. At the end of this period a nominal "purchase" payment is made. This type of purchase is arranged by special finance companies.

Note: 1. The interviewer may have multi-coded because the informant has more than one type of mortgage. If this is so the code to be entered here is that which covers the largest payment. Delete all other codes.

Editing

Code 5 will be printed out at edit stage. Check to see whether source specified indicates that it can be reclassified into one of codes 1-4.

Question 31 - Payment coverage

If the informant's payment normally covers interest and capital/principal but because of unemployment the principal/capital payment has been waived, this should be coded as payment of interest only and Qs 32-34 completed.

Editing

Where an informant has more than one type of mortgage there may be answers at both Q32 and Q35. If this is so the signposting from Q31 will be incorrect but a warning message will be printed. Check that all entries are correct and amend Q31 if necessary to show the mortgage that is the largest.

Question 32 - Interest payment on mortgage

If paid direct by DHSS then accept here but it should also be shown as income at Q56(d), B Schedule (Supplementary Benefit/Income Support).

Editing

If no entry is made when there should be one, impute the missing payment based on current gross weekly household income from Appendix C. The imputed amount should be entered on a K2. If the period code is also missing enter this on K1.

Question 34 - Endowment policy covering repayment of principal/capital of the mortgage

If the endowment policy payment was included in the last amount of interest paid, do not abate the interest payment. This payment should not be duplicated at Q73. Delete the duplicate entries at Q73.

Editing

If premium to be paid is not present then impute, the missing payment based on current gross weekly household income from Appendix C. There is no category for endowment policy but the life insurance category can be used in its place. The imputed amount should be entered on a K2.

Jan 88

Question 35 - Interest and principal /capital payment on mortgage

If paid direct by DHSS then accept here but it should also be shown as income at Q56(d), B Schedule (Supplementary Benefit/Income Support). If the repayment of principal/capital has been waived because of, for instance, unemployment, this should be treated as an interest only mortgage and the payments transferred to Qs32-34.

Editing

If there is no entry when there should be one, impute, the missing payment based on current gross weekly household income from Appendix C. The imputed amount should be entered on a K2.

Question 37 - Interest paid in last 12 months

If no information is available for interest paid in the last 12 months then check that code 1 at DK is ringed. Do not impute information. Do not enter any dates at Q37(a). The figure to be entered here should be the amount paid in the last 12 months, so if an informant has only paid, for example, 5 months interest do not enter an annual equivalent figure but accept the 5 month entry.

Questions 38-39 - Length of mortgage

Any entries of less than 1 year should be coded as 1 year.

Jan 88

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Question 41 - Other payments included in mortgage payment

Do not abate mortgage payments by any of the amounts shown here. Also the insurance on structure and mortgage protection policy should not be duplicated at Qs 71 or 73 respectively. Delete the duplicate entries at Qs 71 and 73.

If any premium paid on insurance of structure includes an element for furniture and contents, abate the mortgage payment by an equivalent amount and transfer the insurance payment to Q71 amending lead in questions where necessary. If any margin notes indicate the inclusion of any other payment, abate the mortgage payment by an equivalent value and transfer the payment to the relevant question, if not already shown there.

Editing

If the premium on structure insurance is missing, impute on K2 based on current gross weekly household income using Appendix C. If the premium on mortgage protection policy is missing, refer to supervisor.

Questions 42-48 General notes on telephone

1. Shared telephone: Where a telephone, and therefore the account, is shared among more than one household the following action should be taken:

- a. Code as Yes at Q42 the household in whose name the telephone is installed ie the household that receives the British Telecom account or who is the British Telecom subscriber. All other households will be coded No at Q42 and 3 at Q 42(a).
- b. If coded Yes at main, the full amount of the bill should be entered at Q43 or at Qs44 and 46 as appropriate with the amount paid by this household entered at Q48(a).
- c. If coded No at main, the amount paid by this household should be entered at Q43. In this case the continuity is not correct but is acceptable.

2. If someone outside the household who does not have any use of the telephone pays all or part of the account, the whole account should be entered at Q43, the part paid by this household at Q48(a) and the contribution from outside the household should appear at Q121 or Q122 as appropriate. If all the bill is paid direct by someone outside the household then 1 should be ringed at Q48 and Q48(a) and Q48(b) left blank.

The total amount should be shown at Q122.

3. Telephone bill not yet paid at this address: If a bill has not yet been paid at the sampled address, the last bill from the previous address should be accepted. Leave Q43 blank if this is not given.

4. All telephone expenses paid direct or refunded by an employer: The amount of the last account should be entered at Q43 but Q48 should be coded 3.

5. Installation charges should be accepted at Q43.

6. Coin operated telephones: Payments through these should only be shown here if the informant is responsible for paying British Telecom. Otherwise they should be coded in the Diaries (see 752) when payments are made during the record keeping period.

7. If the informant has purchased a telephone this will be coded in the Diary (see 414) if recorded during the record keeping period.

8. If the telephone rental is paid by Social Services, only the amount paid for the calls that are made should be entered at Q43.

Editing

As can be seen from 1 above, it is possible to have an answer 'No' at Q42 but an amount shown against the telephone bill. If this occurs it should be accepted.

If the amount of telephone bill is missing and a value should be present, impute the bill, on a K2, based on current gross weekly household income using Appendix C.

Jan 88

Qs 44 and 45 If the last payment under budgeting scheme is not known enter the amount and period code from Qs 46 and 47 on a K1 (do not treat as imputation).

Qs 46 and 47 If the amount charged on the last advice is not known or the last account was a credit enter the amount and period code from Qs 44 and 45 ~~on a K1~~

If no amount shown at Q44 or Q46 impute a value, on a K2, based on current gross weekly household income using Appendix C. Enter period code on a K1.

The imputed amount also has to be entered at Q46 using a K1 with the same period code as shown at Q45.

~~Q48 The stamping is incorrect at code 1 (it will be amended for the second quarter). If 1 has been ringed parts (a) and (b) should be blank. Delete amount and period code if entered.~~

~~If any telephone expenses have been refunded by the employer (Q120) or are being claimed as a business expense (Q50 - B Schedule) then the abatement will be carried out automatically in 1988.~~

Q43 + Q44 - If nothing paid or only a part paid by
freemholder - see also notes 1-2

Budget etc.

Basic Assessment of Telephone charges

----- Telephone -----
Both will have payment other charge on the list when
should be added

Jan 88

If employer pays direct 42A is correct the

Questions 49-50 - Durables and central heating

General notes

1. Communal washing machines: If a block of flats has washing machines available in the basement or wash room for use by the tenants, this does not count as a washing machine continuously available.
2. Washing machine in a shared kitchen: This should be coded Yes on the schedule of all the households sharing, provided that the machine is owned by one of the households in the accommodation.
3. Refrigerator and / or freezer in a shared kitchen: This should be coded Yes on the schedules of all the households sharing irrespective of whether the item is owned by one of the households.
4. Central heating: A central supply system includes any types of central heating that can be controlled from within the household. Where the supply comes from a central source outside the home or household code the type of fuel if known, otherwise code DK fuel.
5. If a charge for oil central heating is included in the rent (Q18 or Q22), no entry should be made at Q50(a)(i).
6. In a multi-household rateable unit where the source of heating is situated in one of the households, the coding of the type of central heating as reported by the informant should be accepted.
7. Do not accept durable items which are beyond repair or cannot be used, eg. central heating that has been disconnected.

Editing

If the amount of expenditure on oil for central heating is not known then impute an amount, on a K2, using Appendix C. The amount imputed will be based on current gross weekly household income.

Oil gas - very rare at 0% Only minor gas at 0.50

Jan 88

Questions 51-70 - General notes to Electricity and Gas supplies

1. These questions cover all supplies which are "piped" from Electricity or Gas Boards, irrespective of whether the supply is direct to the informant or whether it is re-sold to the informant by a landlord, eg through a privately installed meter, or in some other way.

The following are excluded from these questions:-

- a. Electricity generated in a private plant.
- b. Gas bought in containers, eg calor or Butane gas.

Any payments covering these items should be shown in the Diaries if made during the record keeping period.

2. A Board Budgeting scheme is one where the informant pays a regular amount to the electricity/gas board and settles up the balance of his account once a year. It is possible however that the consumer pays a regular amount to the electricity/gas board which is collected by the meter inspector and the account is balanced at the end of the year. Although collection may be made weekly, fortnightly or over a longer period this variation should nevertheless be treated as a Board Budgeting account.

3. Account payments with meters If the consumer is supplied with a slot meter of which he has the key and can remove the money at will but a meter-reader periodically reads the meter and renders an account/bill which is paid in the normal way, this method should be treated as an account payment. Any payments made during the record keeping period should be coded to account payment, code 914 for gas and 917 for electricity.

4. Account not yet paid at present address

- i. The account paid at the previous address should be coded.
- ii. If the present "household" has not occupied a previous address (eg in the case of a newly married couple) leave blank at the coding and checking stage.

5. Rebate not yet received at present address

If the last rebate received was at a previous address then this should be accepted at Q52/62 provided this informant pays by meter at this address. Otherwise code Q52/62 as Yes and leave Q52(a)/62(a) blank.

6. Payments made direct by Local Supplementary Benefit Office from the informant's supplementary benefit

- i. The amount paid direct by the Supplementary Benefit Office should be entered at Q53/63 if known. If not known then leave blank. Enter the relevant period code at Q54/64.
- ii. If not already included there, add this amount to the amount of supplementary benefit received at Q56(d), B schedule.
- iii. Gas and electricity paid in this way is known as "fuel direct" payment and should be coded 4 at Qs 51(a) and Q61(a).

Jan 88

7. Installation charges should be accepted if included as part of the account. If a separate bill is issued for installation, disconnection, repair, etc., it should be coded in the Diaries when paid during the record keeping period.

8. If an informant states that an amount has been deducted from a rebate for rental, maintenance, HP, etc, then this element should be added back to the amount of rebate received.

9. No rebate received when slot meter emptied: If no rebate was received then code No. If a payment was made because the amount collected from the slot meter was insufficient then this should be coded in the Diaries if paid during the record keeping period. If the last rebate is not known then code Yes at Q52/62 but leave Q52(a)/62(a) blank. If the informant did not receive a rebate because contents of meter box were stolen then code No at Q52/62.

10. Some local authorities run a budgeting scheme for their tenants in which a proportion of their electricity and/or gas charges are included in the rent payments. Note that these are not the same as the board budgeting schemes run by the electricity and gas boards (see Q51/61 for further details).

11. Collecting fee (where regular budget payments are shown) should be included in any amount paid for electricity/gas.

12. "Primary charge" is the same as 'standing charge' and should be included in the account.

13. Gas/electricity charges included in rent or service charge
(excluding budgeting schemes run by a local authority - see note 10)

i. Heating

If heating is supplied from a central source, as in a block of flats, and it is included in either the rent (Q18 and Q22) or the service charge (Q29) do not delete the amount shown at these questions. This is where these charges should be entered. If the amount is not known leave the question blank - do not impute it. (Note - If heating is included in the rent or service charge it will usually be supplied by gas.)

Check that code 1 is ringed at the relevant box at Q50 ('A' schedule). If the type of fuel is not known then check that code 1 is ringed at the 'DK Fuel' box.

ii. Cooking/lighting etc

Where the amount is known

If cooking or lighting charges are included in either the rent or the service charge delete the amount shown at these questions and enter it at the questions on electricity/gas supply (Pages 14-15 or 16-17 respectively). Amend the main questions (Q51 or Q61) if necessary. If the charge was included in the rent deduct this amount from the rent payable (Q18 and Q22).

Jan 88

Where the amount is not known.

If the amount is not known (ie. 'DK' has been entered) impute the amount based on current gross weekly household income and enter it at the questions on electricity/gas supply (Pages 14-15 or 16-17 respectively). Amend the main questions (Q51 or Q61) if necessary. If the charge was included in the rent deduct the imputed amount from the rent payable (Q18)

Where the amount is not given and no 'DK' has been entered, refer to R0.

Question 51/61 - Method of payment of electricity and gas

Code 4 (some other method) includes:

- i. Payments made direct by DHSS (local Supplementary Benefit Office) and deducted from the informant's supplementary benefit/income support.
- ii. Local authority budgeting schemes where the rent payment includes a proportion towards electricity and/or gas.
- iii. Where two or more methods of payment are shown at Q51(a) or Q61(a).

Code 5 at Q51(a) applies to Northern Ireland only. In this case, payment is made by slot meter but no rebate is received so no further information is required at these questions. (In Quarter 2 the sign posting will be amended to: 'Go to 61'.)

Question 52/62 - Slot meter rebates

Editing

If the amount of rebate received last time is not known then estimates, based on current gross weekly household income, can be obtained using Appendix C. The impute figure is to be entered using a K2.

Question 53/63 - Last account payment

Editing

If the amount paid for electricity and/or gas is not known this should be imputed as a K2. The imputation should be based on current gross weekly household income using Appendix C. Enter the imputed amount at Q53/63, the appropriate period code at Q54/64, and the date of interview at the date question (Q55/65).

If a local authority budgeting scheme is in operation ie a proportion of the electricity and/or gas charges are included in the rent payments, then the 'fuel element', whether it has been imputed or not, should be deducted from the rent (Q18) and from the services included in the rent (Q22).

Enter this amount at Q53/63 if there is no entry there already. If there is, assume this is only for hall lighting and heating etc. Enter the period code at Q54/64 and ring code 4 at Q51(a)/61(a). If the rent becomes negative or there is a rent rebate refer to supervisor.

Question 56/66 - Last board budgeting payment - board budgeting scheme

Editing

If the last payment is not known proceed as follows:

- a. If an amount is shown at Q58/68 then enter this amount at Q56/66. This should be entered on a K1 with the same period code shown at Q59/69 (ie under board budgeting scheme the last payment equals the charge on the last advice/account).
- b. If no amount is shown at either Q56/66 or Q58/68 see b at Q58/68.

Question 58/68 - Last advice/account - board budgeting scheme

Editing

If amount charged on last advice/account is not known or is a credit then proceed as follows:

- a. If an amount is shown at Q56/66, then enter this amount at Q58/68. This should be entered on a K1 with the same period code shown at Q57/67.
- b. If no amount is shown at Q56/66, then impute a value based on current gross weekly household income from Appendix C. This should be entered on a K1 and the period code on a K1.

The imputed amount must then be entered at Q58/68 and the period code at Q59/69, both on a K1. The period codes at Q57/67 and Q59/69 should be the same.

Question 55/60/65/70 - Dates of last account or advice

Editing

If not known then enter the date of interview. This is to be entered using a K1.

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Question 71 - Insurance on structure, furniture and contents, and personal possessions

Check that for each entry the column number is ringed. Check that an entry here is not duplicated at Q41. If it does then delete the entry at this question, amending the lead in question if necessary.

Except where a premium payment covers structure and furniture and contents, there should be an entry for each type of insurance. So for instance if one premium covers furniture and contents, and personal possessions, two columns are to be completed although the amount of the last premium will be entered in one column only. The splitting of this can be done at editing stage.

Notes on insurance on personal possessions

1. Maintenance contracts for TV sets, videos, TV games, home computers, washing machines, deep freezers, etc should not be included at this question but should be accepted in the Diaries if paid during the record keeping period.
Maintenance contracts for central heating should be included at Q90.
2. If the premium has to be assessed based on the insured value of personal possession, calculate the rate at 25p per £100 insured.
3. Insurance on deep freezers: If no reference has been made as to whether the premium paid is for contents or maintenance, assume all is for contents and enter at Q71. If a note says that the premium covers contents and maintenance, code 75% to contents, and enter at Q71, and the remainder to maintenance. The maintenance element should be accepted in the Diaries only if it is paid during record keeping period.
4. Caravans/houseboats: If the sampled address is a caravan or houseboat then the premium should be coded as structure insurance at Q71(a). If not the sampled address, accept as insurance on personal possessions at Q71(a).

Editing

If the amount of the last premium is not known then impute, on K2, based on current gross weekly household income using Appendix C.

If one premium covers both furniture and contents and personal possessions and the details have already been entered under two columns, refer to R0 for splitting.

Question 74 - Other insurance policies

Check to see whether there are any entries at Q74. If yes then code the Office Use Box as follows:

Personal accident	1
Private medical	2
Friendly Societies and Sick clubs	3
Other	4

Check that the line number has been ringed for each entry.

Notes.

1. Insurances to cover loss of salary whilst in hospital should be coded 4.
2. Personal accident and fire. Transfer half the recorded amount Q71 and code to furniture and contents. Code the remainder at Q74 to 1.
3. Private accident policy for a pedal cycle (accident and theft). Transfer half the recorded amount to Q71 and code to personal possessions. Code the remainder at Q74 to 1.
4. Insurance on deep freezers: See notes at Q71
5. Insurance of caravans/boats: See notes at Q71
6. Animal insurance is included and coded 4.
7. Rentokil insurance is included and coded 4.
8. Insurance on personal goods such as jewellery, furs etc should be transferred to Q71 and coded to personal possessions.
9. Holiday insurance, green card insurance and AA insurance for holidays abroad should not be shown at Q74. This is coded in the Diaries if paid during the record keeping period.
10. Medical defence union should be deleted as a business expense if the informant is self-employed. Accept if informant is employee and coded 4.
11. Insurance on TV sets, video and home computers. Check whether insurance is for maintenance or fire and theft. If for maintenance should be coded in the diaries if paid during the record keeping period. If for fire and theft then transfer to Q71 and code as personal possessions except for rented TV, video or home computer which is code 784 in the Diary if paid during the record keeping period.
12. Insurance on car windscreens: This should be deleted and transferred on an equivalent period basis to Q77(e) or Q79(e).

13. Accident insurance includes:

Police group insurance
Personal consolidation policy

14. Medical insurance includes:

BUPA
PPA
WPA
PPP
HCS

15. Friendly societies are mutual benefit insurance societies and include:

Civil Service Sanatorium
Family service unit
Medical aid
HSA
Mutual aid
Sick clubs

16. Do not accept insurance cover for repayment of loans.
This should be deleted from here and included in the repayment at the relevant loan question.

Editing

If the amount of premium is not known then refer to supervisor for an estimate.

Question 75 - Television sets, video recorders, home computers, cable TV

Note that cable TV has replaced TV games.

Check that for each entry the column number is ringed. If one payment covers more than one rented item, then there will be a column for each item but the amount paid, at Q75 (b)(ii), will be entered in one column only. This will be dealt with at editing stage.

Notes:

1. Rent of TV aerial included in payment for rented TV should be accepted as part of the rental at Q75 (b) (ii).
2. Set needing repair: If a TV licence (see Q76) is held for the set even though it is broken and not working it should be accepted. If no TV licence has been purchased in the last 12 months delete any TVs that are not working.
3. Cable TV must be rented it cannot be owned. It is possible either to rent or to own the TV to which the cable is attached. If a payment occurs in the diary it should be coded 932 as it is now an 'A' schedule item.
4. Where part of the licence fee is included in the television rental. Abate the rental by this amount and enter the whole TV licence fee at Q76(a).
5. Items being bought through TV slot meter rebates by regular instalments Where an item is being bought in this way, it is usually treated as being purchased under an HP agreement and should therefore be entered at Q86. If the amount paid varies then refer to supervisor. The gross rebate should be shown at Q75(c)(i) and any slot meter payments in the Diary should be coded as such when appearing there.
6. Shared TV sets If the set is in a communal room then it should be shown on the schedules of all the households who have access to the TV. If however, one of the householders has a set (which he may own or rent) in his own private accommodation but allows people in other households to watch it, then it should be shown only on the schedule of the owner or renter.

Editing

If the amount of rental paid for a television is missing then impute, using a K2, a value based on current gross weekly household income from Appendix C. If the amount of rebate from a TV slot meter is not known, this can be imputed, again using a K2, by estimating the rental for the TV from Appendix C (as above) and then deducting the amount, on an equivalent period, spent in the diaries. If this value is negative then it becomes the value of the rebate, otherwise no rebate is received. Any other missing values from this question are to be referred to supervisor for estimation.

For combined TV and video rental

- a. If the payment is greater than £20 then accept £10 for the TV and the remainder for the video.
- b. If the payment is £20 or less then split on the basis of 1/3 for TV and 2/3 for video.

Combined TV and cable TV rental

If the individual rentals cannot be separated refer to RO.

Question 76 - TV licence

Note that the total amount paid by all spenders should be entered at this question.

If an amount for TV licence is included in the rent deduct this from the rent at Q and from Q22 and transfer an annual equivalent figure to this question.

Editing

If the amount spent on TV licence is not known then impute, using K2, the correct value of a TV licence, as shown in Appendix D. Unless there is an indication to the contrary, assume a coloured TV licence was purchased and that it was bought at the time of interview.

Questions 77/79 - Ownership or continuous use of motor vehicle

Check that for each entry the column number is ringed. Check that road fund tax and insurance are not duplicated between questions 77 and 79. If an insurance is carried over from one car to another it should only appear in the one place (probably Q79 but not necessarily). If a top up has been paid you would expect this to appear at Q77.

Check that vehicles sold in the last 3 months (Q82) which are not part of a business are accounted for at Q79.

Notes:

1. Car includes invalid tricycles, three wheel cars and normal cars converted for invalid use.
2. Van includes lorries, land rovers, jeeps, motor caravans, caravanettes.
3. A spender may own or have the use of a vehicle which is either not taxed or insured or is "off the road" for repair and these should be included. Company cars used exclusively for company business should be excluded.
4. A self employed person cannot have the continuous use of a motor vehicle supplied by an employer. Therefore all motor vehicles belonging to a self employed person would normally be coded 1 at Q77(g) and Q79(g). If coded 2 then check to see whether it is supplied by someone else eg relative.
5. A vehicle registered in a husband's name but used continuously by his wife should be coded as owned by husband.
6. 'Continuous use of' includes cars supplied by employer, spouse's employer etc but does not include hire cars used from time to time eg for holidays. Cars purchased from employer are also excluded.
7. Exclude any vehicles bought or sold as part of a business. If an informant buys and sells vehicles as a business treat him as self employed.
8. Insurance for damage to windscreen should be included in vehicle insurance.

Editing

If an entry for motor vehicle insurance is not known impute a value, on a K2, based on current gross weekly household income using Appendix C. If an amount for road fund tax is not known then enter the appropriate amount from Appendix D using a K1. In both instances check whether the amount has not been entered because it is paid by an employer or firm. If this is the case then leave the question blank.

A print message will occur if any of the period codes have values 1 to 6. If a monthly or quarterly period code has been entered it is possible that the person has actually paid only a month's or quarter's road tax/insurance during the last 12 months in which case this should be accepted.

If it appears that road tax/insurance is being paid each month or quarter then this will need to be grossed up to an annual figure and the period code adjusted accordingly. Read carefully any interviewer notes before making any adjustment to the figures.

Question 81 - Vehicles purchased in last 3 months

For 1988 this question refers to vehicles bought in last 3 months.

Check that for each entry the column number is ringed.

Check that any road fund tax or insurance has not been duplicated at Q77 or Q79. If it has, then delete that element at Q77 or Q79. Do not abate the cash price because of inclusion of road fund tax, insurance or part exchange.

Check that vehicles included at this question and the credit questions 85-87 are accounted for at Q77 or Q79.

Notes: 1. Cars bought on HP or by loan from an organisation should not appear here but Qs 85-86. Transfer details if this is the case. Note that motor vehicles purchased in the last 3 months using a loan given by an employer who does not provide loans to the general public, should be accepted as being bought outright and should therefore appear at Q81.

2. Delete any car bought on the day of interview.

Editing

Where it is known that the purchase price includes road fund tax but no amount is shown then, if possible, estimate an amount based on the number of months between purchase of vehicle and next payment for road fund tax. If this is not possible to do then enter a 6 month value for second hand vehicles and a 12 month value for new vehicles.

A print out will be given of any purchases of vehicles where an amount was included for part exchange or trade in at Q81(f)(i). Check that this figure is not also shown at Q82(c)(i). If it is then delete from there.

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Question 82 - Vehicles sold in last 3 months

| For 1988 this question refers to vehicles sold in last 3 months.

Check that for each entry the column number is ringed.

| Check that vehicles included at this question which are not part of a business are accounted for at Q79.

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Question 83 - Season tickets

Check that the line no. has been ringed for each entry.

If any informant holds a season ticket, then the mode of transport covered by the ticket should be entered. The coding frame is:

Train only	1
Tube only	2
Train and tube	3
Bus only	4
Bus and tube	5
Bus and train	6
Bus, tube and train	7
Other	8

Check that the information recorded here is not duplicated at Q109 'travel to state school' or at Q73 (B schedule) 'OAP concessionary fare passes'.

Exclude passes that enable the informant to obtain reduced fares on buses or trains. These are not season tickets.

If a season ticket is obtained on credit it should also be shown at credit question 85-87.

Question 84 - Credit card accounts

- Note·
1. A credit card is a card allowing an informant to obtain credit from a bank or organisation to obtain goods or services up to a certain limit on production of that card. It does not include cheque or charge-cards produced by some firms eg Debenhams, Marks and Spencer etc. These should be coded 2 at Q87.
 2. A joint credit card will appear only once. It will appear under the person who is responsible for paying the account.

Questions 85-87 - Definitions of precodes

Question 85 - Loans

Code 1 Finance House direct

Money borrowed from a finance house can be arranged either direct or, through an agent or vendor. If the money was borrowed from a finance house but the instalments are being paid to the vendor this is an HP agreement. The information should therefore be transferred to Q86.

Code 2 Second mortgage

Second mortgage is a loan acquired by using the informant's accommodation as security. The amount of money borrowed is usually considerable and is used for major items of expenditure, eg home improvements, purchase of a car. (A second or top up mortgage used to purchase the sampled accommodation should be entered at Q.30-41 (A schedule, if this has not already been included there).

Second mortgages are sometimes referred to as "personal loans" or 'bank loans'. The determining factor is the use of a house as security for second mortgages.

Codes 3 and 4 Bank or Building Society direct

The most common form of loan direct from a bank or finance house is a personal loan. It may cover the full price of an article or service or it may cover only part depending on the borrower's circumstances. (NB the cash price at Q85(i) would, in this case, still be the total price of the item if it had been bought outright).

Overdrafts - these should not be shown at Q.85 at all. If used to purchase car see Q81 otherwise ignore.

Code 5 Loan from employer

Where the employer is an organisation that grants credit direct to the public, eg bank, finance house etc, as a normal part of its business, then accept the data at Q85 but recode Q85(a) 1-4 as appropriate.

If the employer is one that does not grant credit to the public as part of its business this should be treated as a cash loan but do not delete. If the item purchased was a motor vehicle then transfer details back to Q81 if the purchase was within the last 3 months but enter Diary code 942-944 against the loan entry. Similarly transfer details to Q83 if the loan was for a season ticket purchased in the last 12 months but code the loan entry to 950-954. All other entries code to the item purchased.

Note: If a loan has been obtained to pay off a series of other loans, this should be accepted, code 1-6 as appropriate, and the item code at Q85(f) should be 787.

Jan 88

Code 6 Loan from DHSS Social Fund

Starting in April 1988 what used to be lump sum payments from the Supplementary Benefit/Income Support Office for items such as furniture, clothing, cookers etc will be made in the form of a loan to be paid back by direct payments or deduction from benefit. In the latter case the amount should be added to the same benefit if not already included (adjust to cover the same period if necessary.)

Questions 86-86A - HP or credit sale agreement

Hire purchase is normally arranged by the shop where goods are purchased, and the instalments are repaid to the shop. If the instalments are being paid direct to a finance house instead of the vendor this is not an HP agreement, so the information should be transferred to Q85 - ring code 1 at Q85(a).

Note that with HP the customer does not own the goods until the last instalment is paid and if he defaults and has paid less than 1/3, the goods can be repossessed. A credit sale agreement gives the purchaser ownership of the goods at once.

Question 87 - Budget/option account, chargecard, mail order etc.

Code 1 Budget or option account

A budget or option account is usually with a department or chain store. With a budget account the customer undertakes to make certain payments into an account, usually at a regular rate and time interval. In return, they are able to purchase goods on credit up to a certain figure specified in the original agreement. With an option account, goods are also bought on credit, but the monthly statement received from the store can be paid in full or by agreed instalments. If paid in full, no interest will be charged.

Holders of budget or option accounts are often issued with a plastic card similar to a bank credit card. This is NOT TO BE TREATED AS A BANK CREDIT CARD BUT AS BUDGET (OPTION ACCOUNT). This card can be used sometimes in a number of shops, eg. Readycredit card can be used in Ryman's and Top Shop.

Code 2 Chargecard

A card issued by a store for use in the store, examples are Marks & Spencer and Debenhams. The card holder has a pre-arranged credit limit and can obtain goods including food up to that limit. Each month the cardholder is sent an account statement showing goods purchased. The cardholder must pay off some of the credit later each month with a minimum of £5.00 or 5% of amount owing. The whole amount can be paid off at any time. Chargecards are gradually replacing budget and option accounts.

Code 3 A club run by a shop

Clubs are usually run by small shops principally for clothing, toys and household goods. In many cases the customer has to make a number of payments to the club before being entitled to make a purchase. Note that Xmas clubs, savings clubs, etc. are excluded.

There are various schemes run by different co-operative retail societies. These should be coded 3 unless they are HP or credit sales agreements when they are coded at Q86/86A or loans when they are coded 1 at Q85(a).

Code 4 Mail Order Agent

This includes all payments made to the mail order agent, or direct to the mail order club, acting on behalf of a mail order firm (eg Littlewoods, Great Universal etc). the informant is an agent and also makes purchases for herself, her instalments should be coded to Mail Order Agent, while any postage on behalf of the club is business expenditure and should be deleted.

Code 5 Any other mail order organisation

This is where an informant deals direct with the mail order firm and includes direct payments to firms that advertise in the press. All goods are ordered by post and no one is paid any commission.

This person will not receive an income as a mail order agent in respect of these transactions.

Mail order firms can also arrange HP and credit sales, such arrangements should be coded at Q86/86A.

Code 6 Check trader

Here the customer pays for goods by check. Usually a check trader calls on the customer to sell checks which can then be used to buy goods such as clothing, textiles and small household goods in a number of shops. Some retailers also issue checks. The largest check trading organisation in the country is the Provident. This type of trading is most prevalent in the North of England. Check traders also provide HP and credit sale facilities which should be coded at Q86/86A and loans - code 1 at Q85(a).

Code 7 Loan from other person or organisation (except credit cards)

This code is for any doubtful or unusual schemes and the coder should transfer, accept or delete as necessary. Legal fees or legal aid being paid in instalments may be accepted at Q87 code 7 (but if legal fees appear in the diary as a once only payment, code to 799). Refer any doubtful cases to the supervisor.

Notes:

1. Loans from relatives/friends etc: delete all information concerning any such loans. If the loan was used to purchase a motor vehicle in the last 3 months, transfer all relevant information to Q81.

2. Provident check arrangement should be coded as a check trader, code 6 at Q87, unless it is clearly an HP or credit sale agreement when it should be coded at Q86/86A or a loan - code 1 at Q85(a).

3. Christmas club hamper, Christmas club and book club payments should be deleted from this question and coded in the diary when they appear there.

→ Christmas club hamper - code 199
Christmas club payments - code 803
Book club payments - code 721

4. Delete all items bought on the day of interview.

5. Cash loans obtained direct from a Bank or Finance House should be referred to Research. It has been found that an increasing number of such loans have in fact been for specific items. Do not delete.

6. A bridging loan for the purchase of a property should be treated as a short term cash loan and deleted.

7. If interest is paid on a mail order purchase, this should be classed as HP and coded at Q86/86A.

8. Continuous credit schemes Where credit is extended to cover additional items and the original loan is never paid off, delete all references.

9. Car leasing. Delete all references, transfer a weekly equivalent value to each diary and code 556.

Question 85 - Item being bought by a loan

Check that there is a separate column for each item purchased and that the column number has been ringed in each column used. If more than four items are being purchased by a loan, then additional pages should be added, and the column nos, changed to 5, 6 etc.

Code 6 will only apply from April 88. If the amount at Q85(c) has been deducted from a benefit then this amount should be added to the same benefit if not already included (adjust to cover the same period if necessary).

If more than one item is being purchased with a loan each item should be entered in separate column. The amounts shown at the following questions should then be apportioned on the basis of the cash price Q85(i) of the items purchased:

- Q85(b) - amount of loan
- Q85(c) - last payment ie instalment
- Q85(k) - deposit

Code the items purchased in the top Office Use box at Q85(f).

Note that the amount allowed in part exchange at Q85(j) should not be apportioned. If one of the items purchased is a car and an amount has been allowed in part exchange, refer to supervisor before apportioning.

- Notes:
1. If the informant has agreed to pay £X in instalments but prefers to pay variable amounts, accept amount paid last time at Q85(c).
 2. If there are two loans from separate sources in respect of the same article, as a general rule both loans should be coded as two separate agreements. The cash price should be proportioned between the two.
 3. Where the informant acted as a guarantor for an item bought using a loan and is now paying off the instalments, the item should be deleted and a weekly amount entered in the diaries coded to 799.

Question 86/86A - Item being bought under HP or credit sales agreement

Check that there is a separate column for each item purchased and that the column number has been ringed in each column used. If more than four items are being purchased by HP or credit sales agreement, then additional pages should be added, as the column nos. changed to 5, 6 etc.

If more than one item is being purchased under the same agreement each item should be entered in a separate column. The amounts shown at the following questions should then be apportioned on the basis of the cash price (Q86A(d)) of the items purchased

86A(g) - deposit
86A(h) - instalment

Code the items purchased in the top Office Use box at Q86A(a).

Note that the amount allowed in part exchange at Q86A(f) should not be apportioned. If one of the items purchased is a car and an amount has been allowed in part exchange, refer to supervisor before apportioning.

- Notes:
1. Where the hire purchase price (ie cash price plus interest) is given but the cash price itself is not known, refer to the RO for an estimate.
 2. If the informant has agreed to pay £X in instalments but prefers to pay variable amounts, accept the amount paid last time at 86A(h). If the article bought was paid off in one payment, even if the first payment was interest free, then accept at Q86A.
 3. Where the informant acted as a guarantor for an item bought by HP or credit sale and is now paying off the instalments, the item should be deleted and a weekly amount entered in the diaries coded to 799.

Jan 88

Question 87 - Item being bought with arrangements coded 1-7

Check that the correct person number, line number and code have been entered in each row on page 36.

If more than 15 items are being purchased under one or more of these arrangements, then additional pages should be added and the line numbers changed to 16, 17, etc.

Code the items being purchased in the Office Use box.

Editing

There will be a printout for all entries which have been coded 7 (loan from other person or organisation) at schedule reference Q87D3. Check whether these entries should be there or could be deleted, and, if they should be there, whether they can be reclassified into one of the other categories shown at Q87.

Jan 88

Question 93 - Expenditure on purchase or sale of property

Check that the person numbers have been correctly entered and the relevant column numbers ringed.

Include expenditure on the purchase or sale of any property except property only used for business.

Note:

In 1988, this question is experimental, so any entries elsewhere in the A schedule (Q85-87 and Q104) or in the diaries should be coded to the item or service purchased not the 900 series.

Editing

If the amount is not known refer to R0 for an estimate. The estimated amount should be entered on a K2.

If any of the amount paid is being claimed as a business expense the abatement will be carried out automatically.

Question 94 Expenditure on furniture (in the last 3 months)

This question applies to new and secondhand furniture.

In 1988, this question is experimental, so any entries elsewhere in the A schedule (Q85-87 and Q104) or in the diaries should be coded to the item purchased not the 9 series.

Editing

If the amount is not known refer to RO for an estimate. The estimated amount should be entered on a K2.

Question 95 - Expenditure on carpets and carpeting (in the last 3 months)

Include: fitting charges

Exclude: vinyl/plastic floor coverings

In 1988, this question is experimental, so any entries elsewhere in the 'A' schedule (Q85-87 and Q104) or in the diaries should be coded to the item purchased not the 900 entries.

Editing

Delete the amount at Q95(a) if it is £50 or less and recode the main question.

If the amount is not known refer to R0 for an estimate. The estimated amount should be entered on a K2.

Questions 96-102 Expenditure on holiday

The layout of these questions has changed in 1988

Check that the person numbers have been correctly entered and the relevant column numbers ringed.

Notes:

1. These questions are concerned with the expenditure on holidays made during the last 3 months irrespective of whether the holiday has been taken or not and regardless of the length of the holiday taken, which means that the holiday can be of any length.
2. Holidays taken at informant's holiday home or with relatives where there is no payment on a commercial basis should not be included.
3. Note that holidays in UK (England, Scotland, Wales and N. Ireland) as well as in Eire are to be identified. Channel Islands and Isle of Man are not in UK.
4. In 1988, these questions are still experimental, so any entries elsewhere in the 'A' schedule (Q85-87 and Q104) or in the diaries should be coded to the item or service purchased not the 900 series.

Editing

If the amount is not known refer to RO for an estimate. The estimated amount should be entered on a K2.

Jan 88

Question 103 - Current/budget accounts and domestic bank charges

Check that the column number has been ringed in each column used.

Do not abate bank charges because of any business element.

Notes.

1. Charges on bank credit cards should be excluded.
2. Deposit/savings accounts are specifically excluded from this question.
3. Do not include counter charges for cashing cheques. (These should be coded in the Diary when they appear there - see 799).
4. Interest charged on loans, overdrafts and bank budget accounts should be excluded.
5. If a joint account is held, a separate entry should be made for each informant. Any service charges should be divided equally between the joint account holders.

Editing

If the amount is not known then impute, on a K2, based on current gross weekly household income using Appendix C.

Question 104 - Payments by standing order or direct debit

Standing orders/direct debits may be arranged through a bank account, bank budget account, Building Society or National (Post Office) Giro account. It also includes payments via Safe Homes, Secure Homes etc including service charges (85p a week) these payments should be treated in the same way as bank budget accounts. Where there are entries in the grid, check that the item number has been ringed.

Code the item being paid for in the Office Use Box using Diary codes.

Do not delete any items appearing elsewhere in the A and B schedules. Use the 900 series diary codes for coding any A or B schedule items which occur at this question.

Editing

All budgets where Q104 is answered 'Yes' will be printed out. Use this to check the diary codes at schedule reference Q104 3. If the diary code is wrong this cannot be amended on printout or K1. Delete the whole entry (record) using form K4. Enter the correct details on a facsimile of this question, insert an asterisk at each end of the line to be repunched and then complete FORM K15.

Question 105 - Prescriptions - items acquired free of charge

Delete any items acquired on a prescription season ticket.

Jan 88

Question 106 - Free Welfare Milk

Delete any entries of dried milk from this question.

Jan 88

Question 107 - Free School Milk

Free school milk is supplied to children up to their seventh birthday (11th birthday in some LEA's) at registered day nurseries, playgroups, state primary schools or approved child minders. The normal amount is one third of a pint per day.

For children with particular health problems, milk may be supplied up to their sixteenth birthday or the allowance may be more than one third of a pint.

Editing

The print out will show all those people who are receiving free school milk. Amend the number of pints at Q107(b) to the number of thirds of a pint received ie. if someone has received $1 \frac{2}{3}$ pints, this will be amended to 5. If someone receives $1 \frac{1}{3}$ pints refer to supervisor.

Question 108 - State School Meals

This includes only those meals provided by state schools to the students. The total amount paid in the last seven days should be accepted irrespective of the period it covers. Similarly the entry at Q108(b) should be the number of school meals had in the last seven days.

10. If the cost of a driving test has been included in the payment for driving lessons, the amount paid for the test (£15) should be deducted from the payment made. Driving test should be coded 770 in the diary when it appears there.

11. Delete any language courses taken abroad.

12. Fees for children attending Grammar Schools in N. Ireland should be coded private at Q110-111 or Q116-117.

13. Gifts of money (eg pocket money) over and above the amounts required for education should be excluded from Q110-119 and shown in the diary see 801.

14. Parental contributions towards a grant should be included at Q111 under the parent's person number and at Q70 (B schedule) under the child's person number if the child is a spender. This applies whether the parents and child are in the same household or not. Parental contributions may also be included at Q112, if, for example, the child takes a leisure course as a part of his/her educational course. Note that cash gifts above the value of the grant should be ignored.

Question 110 - Attending a course for which an education grant, maintenance grant or scholarship is received

Note that, in 1988, Q110 asks whether spender or child are attending a course.

Check that the column number has been ringed. Do not transfer any data to the B schedule except in the instance of grants from employers (see notes 5-7 at Qs 110-111; general notes on education questions).

Editing

If the amount of the grant has not been shown at Q110(c) (state) or Q110(d) (private or overseas) impute, on a K2, the amount based on current gross weekly household income using Appendix C.

Questions 111-112 - Fees maintenance for educational/leisure courses in last 3 months

In 1988, Q111 and Q112 relate to fees paid in the last 3 months.

If fees are entered in the diary (codes 980 or 981) and the course was attended prior to interview, check that the details of the course have been entered at Q111 or Q112. If no details are given refer to RO.

Check that column numbers are ringed

The entries at Q112 are expected to be recreational.

All vocational studies should have been picked up at Q111. However, it may be necessary to transfer and therefore the following points should be borne in mind:-

Recreational Education includes all part-time educational activities which cannot be identified as vocational, including doubtful cases and "evening classes" (nes) unless attended by apprentices. In general this covers:

Music, dancing, fencing classes
Training in Sport and Athletics
Handicraft, needlework, art classes
Homemaking, cookery, "do-it yourself" classes
Course of lectures, including those given by the WEA
Courses in arts or the literary arts
One-day schools, weekend schools, summer schools, "Teach-ins"
Driving lessons

- Notes:
1. Fees for day nurseries/play groups should be deleted and coded 780 in the Diary when they appear there. Play schools/nursery schools should be accepted at Q112. Check against Q7 of the household box to make sure the coding is correct.
 2. Membership subscriptions to a Society, Club etc should be excluded and coded in the Diary when they appear there - see 796 or 797.
 3. Language courses such as 'Linguaphone' on tape or records or any other type of correspondence course should be included unless they are taken abroad.

Editing

If the amount of fees paid is missing, refer to supervisor.

Question 113 - Part-time Courses at a State Educational Establishment

Check that column numbers are ringed.

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Questions 115-119 - Grants received by or fees paid for children outside household

Changes in 1988

Q116 relates to fees paid in the last 3 months

Q117 asks whether spender or child are attending a course.

Editing

Any missing information from these questions, refer to supervisor.

The print-out will indicate that the relationship to HOH needs to be completed. This can be entered on the print-out and the coding frame to be used is that given at Q2 on the front page.

If fees are entered in the diary (code 984) and the course was attended prior to interview, check that the details of the course have been entered at Q116. If no details are given refer to RO.

General Notes on Business Refunds - Employees

These notes refer to Q120, A Schedule and to Qs 18-21, and 30, B Schedule. The questions apply only to those currently working or those who have been unemployed for 13 weeks or less.

A. PURPOSE

The purpose of the questions is:-

1. to identify all refundable expenditure and to edit it out of the schedules.
2. to adjust pay details so that they do not contain refunds (or allowances) for business expenditure
3. to adjust pay details so that they do contain allowances for 'private' expenditure, ie non-business allowances which are a 'perk' and therefore, in reality, an addition to salary.

B. TYPE OF EXPENDITURE

In order to achieve the purpose, it must first be decided whether the information relates to business expenditure/allowance or private expenditure/ allowance. The following rules should be followed:-

1. Always count as business expenditure if refunded or covered by an allowance
 - i. Car expenses
 - ii. Telephone expenses
 - iii. Lodging allowance for a household member living part of the week away from the household on business (but check carefully he/she is a household member)
 - iv. Subsistence allowance
 - v. Expenditure on transport (rail or bus etc) provided it is for travelling on the job, or getting to work where the place of work varies (eg building trade) (otherwise see 2.iii)
 - vi. Refunds/allowance for an occasional meal (otherwise see 2.i)
 - vii. Entertainment, stationery, postage and other items which could be used in connection with the informant's work.
 - viii. Household expenditure provided part of the rateable unit is used for business (otherwise see 2.ii).

2. Always count as private expenditure ('perks') if refunded or covered by an allowance

1. A regular meals allowance (as opposed to 1.v1)

ii. Household expenditure provided no part of the rateable unit is used for business.

iii. Expenditure on transport (other than on cars) to get to work (as opposed to 1.v).

C. ACTION NEEDED

1. A schedule recorded expenditure, ie rent, mortgage, rates, water charges, structural insurance.

i. If refund covers private expenditure ('perks'), NO ACTION needed to A schedule.

ii. If refund covers business expenditure, the refund/allowance brought to the same time period, must be deducted from the appropriate A schedule entry. When manual abatement applies, the amount of expenditure by the household after abatement will be entered on a K3. Where the abatement is computerised no action is necessary.

2. B schedule recorded income.

i. If business allowance is included in pay details, it should appear at Qs 18-21 and 30. If it does then no action is necessary. If it does not appear there but there is an indication that it is included in pay then enter it at the relevant question.

ii. If business allowance is not included in pay details NO ACTION needed regarding the adjustment of pay.

iii. If private allowance is included in pay already, NO ACTION needed but delete the private allowance at Qs 18-21 and 30 and amend precode if necessary.

iv. If private allowance is not included in pay, adjust to the same time period and add to the pay at Q.11, the gross pay (if given), at Q17(a) and the usual net and gross pay at Q.26 (when 1 is coded). Delete the private allowance at Qs18-21, and 30 and amend precode if necessary.

Note: It is assumed that these refunds/allowances are not taxed, and therefore the same amount can be added to both net and gross pay, but if the interviewer has noted that a refund/allowance is taxed, or that its net and gross values are different, refer to supervisor.

3. D schedule items.

i. If a private allowance mentioned at Q120, A Schedule or Q18-21 or 30 B Schedule is already included in pay, delete any claims at page 36 D Schedule and code the items in the D books. This is because the allowance has already been shown as income in the B schedule, and when spent, should be coded as expenditure.

ii. Refer to supervisor any doubtful cases.

Question 120 - Refunds of household expenditure by an employer

Do not abate any of the household expenditure at the coding stage. Only business expenses of employees or informants employed in the last 13 weeks should appear here. Any entries relating to self employment or to those out of work for more than 13 weeks should be deleted.

Editing

The printout will indicate where there is a business refund. See 'general notes on business refunds' (on the two preceding pages) for definition of business and private expenditure. Any private expenditure refunded by employer should be deleted from the question.

First decide whether each expenditure referred to should be classed as business or private, and abate as detailed below:-

a. If classed as business expenditure (see General Notes) then:

i. The refunded element is edited out by abating the amount of expenditure recorded elsewhere by the amount at (i) after conversion to a common time period. This could be at any of the following A schedule questions according to the answer at Q.112:-

Rent	Q.	18
Rates	Q.	24 and 124-125
Water sewerage rates	Q.	28
Mortgage payment	Q.	32 and 34(a) or 35 and 37
Insurance on structure	Q.	41 or 71
Telephone	Q.	42-48
Electricity	Q.	51-60
Gas	Q.	61-70
Road Fund Tax	Q.	77(b) and 79(b)
Vehicle Insurance	Q.	77(e) and 79(e)
Vehicle Purchase	Q.	81 and 85-87

The abated value is to be entered on K3.

ii. Where expenditure on rates (or rent including rates) is abated, the NRV and GRV should be abated in the same proportion, using K3.

iii. Where mortgage payment is abated, the interest payment must also be abated in the same proportion (Q34(a) or Q37).

b. If classed as private expenditure (see General Notes) then:

i. Do not abate at any of the A schedule questions.

ii. Add back to informant's pay details on an equivalent period basis.

Question 121 - Money given regularly from someone outside the household for items of expenditure

Check that the column numbers are ringed.

This question relates to private individuals giving money, not organisations, employers or government agencies etc.

Regularly paid items only are covered by this question, eg. TV rental. A once off item, eg. cooker installation, is not covered.

Editing

Check that the money given to the household is also shown at the relevant expenditure question. This is because this money has to be shown as income and expenditure since the household did not necessarily spend the money on the item that it was given for.

Do not include any items here refunded as business expenditure.

Question 122 - Regular items of household expenditure paid direct by someone outside the household

Check that the ~~column numbers~~ are ringed.

This question refers to individuals, not organisations, employers or government agencies, etc making payments.

Editing

Check that there are no corresponding entries at the relevant A Schedule items. The will be counted as items of expenditure of the household who has actually spent the money.

If the item is not an 'A' schedule item (ie is a diary item) delete amounts for that item in D schedule provided it is a regular item, eg Cooker rental. Do not delete once off items, eg cooker installation in the D schedule.

Do not include any items paid for direct by a business.

If the amount is not known, check that the entry does not appear at the relevant A Schedule item and delete the entry from Q122. Amend the precode if necessary.

Question 123 - Maintenance and separation allowance

Check that the column numbers are ringed.

This question balances Q70 (B Schedule) which asks about the receipt of an allowance.

If a maintenance or separation allowance payment occurs in the diary it should be coded 985 as it is now an 'A' schedule item.

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Questions 124-125 Gross and net rateable values

Do not abate because of shared rateable unit or business refunds or claims.

Editing

If GRV and NRV are abated because of business expenditure, enter abated values using K3. See Q120 A Schedule and Q50 B Schedule for instructions on business expenditure. If rooms are used partly or solely for business expenditure or the description (at Q126) indicates business expenditure but no claims are made then refer to supervisor.

If GRV and NRV are abated because of multi-households, enter abated values on a K1 using the following procedures:

1. Where there is a budget for the owner of the rateable unit (RU)
 - a. Use this budget to calculate the total rooms in the RU. This is all bedrooms, kitchens, sculleries used for cooking, living rooms, rooms used partly and solely for business, bathrooms and garages.
 - b. To calculate the number of rooms occupied by each household in RU
 - i. 3 or less households; Number of rooms per household is the number of bedrooms, kitchens, sculleries used for cooking, living rooms, rooms used partly and solely for business, bathrooms and garages plus a proportion of any of these rooms shared.
 - ii. If there are 4 or more households in RU then shared bathrooms and garages are ignored in calculating number of rooms used by household.
2. Where there is no budget for the owner of the RU.
 - a. Total number of rooms in RU is the total number of bedrooms, kitchens, sculleries used for cooking, living rooms, rooms used partly and solely for business, bathrooms and garages and any other rooms shown at Q15.
 - b. Number of rooms occupied by each household in RU.
 - i. 3 or less households: Number of rooms per household is the number of bedrooms, kitchens, sculleries used for cooking, living rooms, rooms used partly and solely for business, bathrooms and garages plus proportion of any of these rooms shared.
 - ii. If there are 4 more households in RU then shared bathrooms and garages are ignored in calculating number of rooms used by household.

3. The GRV and NRV are then abated by calculating

$$\text{NRV (or GRV)} \times \frac{\text{No. of rooms used by household}}{\text{No. of rooms in RU}}$$

If NRV is not available (eg Married Service Quarters), impute, using K2, 1 £40 per room used by household. For caravans estimate NRV based on site rateable value divided by number of caravans on site otherwise enter estimate of £25.

If the NRV is known then the GRV can be imputed on a K2, using Appendix D

Question 127 - Concessionary Bus Travel for Old Age Pensioners

This question only applies to men aged 65 and over and women aged 60 and over.

Concessions are also granted to handicapped people, but if they are under the ages given above the entries should be deleted.

| Multi-coded answers should be recoded 5.

See also instructions at Q73, B Schedule.

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Question 128 - Special circumstances

If no code has been ringed and there are no interviewer's notes ring code 2 otherwise code as 1.

If code 1 has been ringed but no notes are given recode to 2 unless there are any notes in the back of the Diary indicating that special circumstances have occurred during the record keeping period.

If code 2 has been ringed and there are notes indicating that special circumstances have occurred recode to 1.

INCOME SCHEDULE

FRONT PAGE AND GENERAL NOTES

There is room for three spenders on each budget. You would normally expect Person Numbers to be 01, 02, 03, etc but in some circumstances you may have only persons 01, 02 on the first schedule and 03 or 03 and 04 on the second schedule. This is acceptable. It is also acceptable to have person numbers not in numerical order provided the person having been allocated a column remains in that column throughout the schedule. It is only necessary to have person numbers at the head of pages on which information occurs for that informant. If the interviewer has written person numbers on pages where no information occurs, do not delete the person number.

Joint incomes (including investments) should be divided between the recipients. The division should be carried out equally unless the interviewer has noted an alternative arrangement. The interviewer should have made a note on any joint income, it may therefore be discovered at the coding stage by reading notes or at the editing stage by an inconsistency between questions.

Continuation sheets should only be used for:

Q80(a) - 'Odd jobs' question

Q81-82 - If there are more than 3 children under 16 in the household

Q83 - If there are more than 3 spenders and children under 16 in the household

Q85-93 - 'Assets' questions

Check that all entries in the pence column have two digits. If there are no pence 00 must be entered.

Amendments at the CODING stage must be made in RED

Amendments at the EDITING stage must be made in GREEN

Question 1 - Definitions of precodes 1-7

Code 1 Employee

An employee is someone who at the time of interview is working for an employer (another person or an organisation) for a wage or salary.

This definition does not incorporate a time limit so it applies irrespective of the interval between the time of interview and the date when the informant next begins to work. It therefore includes anyone who is:

- i. on holiday
- ii. on strike
- iii. locked out
- iv. "laid-off"
- v. on short-time working
- vi. unable to work through illness/injury
- vii. unemployed but who is doing work on the side as an employee.

The above only applies as long as the informant has a job to return to.

It does not apply where employment has been terminated before the date of interview nor does it apply if the informant is unemployed at the time of interview but has an arrangement to start a new job.

Outworkers - All people who work at home should be classed as employees (code 1).

Casual or seasonal workers should be coded as employees if, on the day of interview they are working for an employer. If they have an agreement to work for an employer in the near future or are on an employer's books they should be coded as unemployed (This applies to occupations like market research interviewers and agricultural workers).

Resident employees such as au pairs and domestics who are members of the household should be classified as working as employees even though in this situation payment is made from one member of the household to another. (The HOH's or Housewife's Diary should show the wages paid as an item of expenditure - code 780: but note the payment of wages to agricultural workers "living in" with the farmer's household should be deleted if shown in the record books, as they constitute business arrangements.)

Employed in the United Kingdom but paid in a non-UK currency should be treated as an employee. Enter at Qs 10-17 details only of income remitted to the UK. Refer to supervisor for conversion rate applicable on the date of payment.

Working students, including sandwich course students, should be coded at Q.1 according to the situation at the time of interview ie if working they should be coded as "employees"; if at college and not receiving a wage/salary they should be coded as "none of these". However if a student is attending college at the time of interview but is also being paid a wage/salary, he should be coded as an employee, although he should also be shown as a student on the front page of the A schedule.

Working directors of a private or limited company should be coded as employees.

If a wife is on the books of her husband's firm for tax purposes, she should be accepted as an employee regardless of how many hours she works. If her wage or salary is not shown, accept the single persons personal tax allowance, as her gross pay - see Appendix C.

Shop assistants including demonstrators, should be coded 1, but if the informant's description of her occupation in a retail outlet is doubtful, query with the supervisor.

People with a regular but intermittent arrangement to work for the same employer (such as many school kitchen staff) should be coded as employees, even during the periods they are not working.

Occupational therapy Persons who attend therapy centres etc for the physically or mentally handicapped should not be coded as employees but as 4, 5 or 7 depending on the degree of sickness etc. The benefit from the centre should be entered at Q70 and treated as an allowance from an organisation. (code 2).

Clergy may be self-employed or employees. In general, code as given below, although there may be some exceptions -

1. Roman Catholic Priests - refer to supervisor.
2. Church of England clergy - treat as employees.
3. Non-conformist Ministers - treat as employees.
4. Jehovah's Witnesses - treat as self-employed.

Code 2 Self employed or employer

A self-employed person or an employer is anyone who does not receive a wage or salary from an employer and who is responsible in their work only to themselves. Tax is generally paid direct to the Inland Revenue by them. Self-employment can be for any number of hours (eg as little as one hour a week).

Self-employed includes.

- i. the sole owner or part owner of a business
- ii. a partner in business or private practice
- iii. a director receiving fees only
- iv. persons who would be self-employed if not sick
- v. farmers working on their own account.
- vi. informants who rent out their bedrooms to hotels as an annexe
- vii. child minders
- viii. someone unemployed who is doing work on the side as self employed.
- ix. a manager who is the owner of a business which is not a limited company.

It does not include

a working director or manager of a private or limited company

Both are employees and the salary drawn should be entered at Q.10 et seq. Any dividends received should be entered at Q67, and any undistributed profits of the Company deleted, if given, as they are not part of income.

Code 3 Out of employment but seeking or about to start work

This code includes informants who, at the time of interview, do not have an arrangement with an employer to work for a wage or salary but who are seeking work (whether or not they have worked before). It also includes those who, though currently unemployed, have an arrangement to start work.

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"Seeking work" means actively seeking work, ie being registered at an Employment Exchange or other employment agency, answering advertisements or advertising for jobs, providing the period of unemployment is 520 weeks or less. If more, recode as '7'.

Informants at Government Training Centres, Skill Centres or Industrial Rehabilitation Units should be included here, and the allowance they receive should be entered at Q56(b), ie unemployment benefit. Informants on TOPS scheme are also included and have their allowances coded at Q55. However, CEP workers are paid at local wage rates and included as employees (code 1). In general, if the informant receives an allowance he should be coded as unemployed; if he receives a wage he should be coded as an employee.

The following list gives an indication as to whether the informant receives an allowance or a wage:

.United Vocational Programme	Wage	Employee
-Training for Skills Programme	Wage	Employee
-Young Workers Scheme	Wage	Employee
Temporary Short Time Working Compensation Scheme	Wage	Employee
Community Enterprise Programme (CEP)	Wage	Employee
- Action for Community Employment (N Ireland)	Wage	Employee
- Youth Training Scheme	) Allowance	Employee or unemployed
Youth Training Programme (N Ireland)	) or wage	unemployed
* Training Opportunities Scheme (TOPS)	Allowance	Unemployed
. Community Industry Programme	Allowance	Unemployed
- Enterprise allowance	Fee and allowance	Self-employed

Code 4 Out of employment because of sickness or injury but intending to seek work or about to start work

Applies to informants who are actually sick or injured at the time of interview and who have been so for 520 weeks or less.

Code 5 Sick or injured but NOT intending to seek work

Includes those who do not intend to seek work and also those who have been unemployed because of sickness or injury for more than 520 weeks.

Code 6 "Retired"

It is difficult to provide a precise definition of who is to be included in this category. In general the informant's word should be accepted, but it should be borne in mind that the intention is to include only those who, at the time of interview, have retired from their full-time occupation and are not seeking further employment of any kind. Women who at a comparatively early age cease to work to become housewives should not therefore be included in this category.

Retired but under retirement age: If aged under 65/60 and receiving unemployment pay (Q56(b)), code as unemployed. If aged under 65/60, coded retired and not receiving unemployment pay (Q56(b)), the informant should be accepted as retired. Note it is possible to receive unemployment pay after retirement age if "retirement" has been waived.

Early retirement: An informant who has left work early on a Government Job Release scheme should be coded as retired and his gross benefit included at Q58(d); any tax paid on his benefit should be shown at Q75. If an informant has retired early and is not seeking work then they should be accepted as being retired.

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Code 7 None of these

- Includes
1. All persons never in employment and not seeking employment.
 2. Persons of independent means.
 3. Women engaged in unpaid domestic duties (even if they had paid work at some time).
 4. Students over 16 who are not employed at the time of interview.
 5. Informants who are at Handicapped Training Centres. Note that any money they earn should be transferred to Q70.

If they receive free meals, the imputed value should be entered at Q70, (and also entered in the D books as "Meals Out").

6. Persons whose only remuneration is income in kind, eg free accommodation, but no wage or salary.
7. Persons out of employment for more than 520 weeks and not retired, sick or injured even though they claim to be seeking or intending to seek work.
8. Prisoners.

9. Absent Spenders

Interviewers have been instructed to ring codes 1 or 2 at Q1(a) and to follow the sign-posting through as if the person were present in the household. In addition, they have been asked to give details of any regular allowance paid at Q70 (if the absent spender is a non-spouse) or Q71 (if he/she is a spouse).

As the information entered at the pay questions is collected by proxy it is likely to be inaccurate whereas details of the allowance should be fairly reliable.

To avoid double counting therefore, the following procedure should be adopted

1. If the absent spender is a spouse (residing in UK or abroad)

Q1(b) should be coded 7 and any regular allowance entered at Q71.

- a. Delete code 1 or 2 at Q1(a) and delete all entries up to and including Q50.
- b. Ring code 7 at Q1(b) and also code 2 at Q6, Q7 and Q8.
- c. Check that the allowance has been entered at Q71.

ii. If the absent spender is a non-spouse (residing in UK or abroad)

For example, a son may be sending money home to his parents.

Q1(b) should be coded 7 and any regular allowance entered at Q70.

- a. Delete code 1 or 2 at Q1(a) and delete all entries up to and including Q50.
- b. Ring code 7 at Q1(b) and also code 2 at Q6, Q7 and Q8.
- c. Check that the allowance has been entered at Q70.

Note

If a spouse or a non-spouse is not a household member then details of any regular allowance should be entered at Q71 and Q70 respectively.

Notes
on
Question 1

1. If an INFORMANT is or has:-
 - (a) more than one job it is the status of the MOST REMUNERATIVE which should appear at Q1(a). If the schedule shows that the informant's other job is the more remunerative, then Q1(a) should be recoded in accordance with his status in this other job. Subsequent questions may need amending as a result of this.
 - (b) retired or out of work from his 'main job' he should be recoded 1 or 2, which ever is applicable, if it is apparent from elsewhere in the schedule that he has done some other job at which he is currently working. Code 1 or 2 applies even if the person is receiving unemployment benefit.
 - (c) never had a job but is currently looking for work or about to start he work should be coded 3 or 4 as applicable (eg school leavers). In this case Q4 and Q9 should be left blank. This is the only situation where occupational details are not required.
 - (d) an arrangement to start work but is not actually working at the time of the interview, he is NOT an EMPLOYEE but is considered to be UNEMPLOYED and should be coded 3 or 4.
2. 'At present' means on the day of the interview.
3. Hours worked. An informant should always be accepted as "working" irrespective of the number of hours worked or the regularity of the job.
4. Change of employment status. Refer all cases where this is necessary to your SUPERVISOR.
5. Married informants not working whose last employment was abroad. Accept code 3, 4 or 5 at Q1(b) and record the last allowance sent to spouse (under spouse's person number) at Q71. Do not record any details at the pay questions.

Question 3 - Employees temporarily away from work

3(a)(1) - Reason for absence

If the reason for absence is maternity leave then ring code 4. If the informant is male and he is on paternity leave then ring code 2.

3(a)(ii) - Pay

If the informant is receiving only statutory sick pay then they should be coded as 'no pay' from the employer. If the informant is receiving statutory sick pay and pay from the employer then they should be coded 'part pay, or made up pay.

3(a)iii) - Number of weeks away from work

If the period is less than a week, code as 1 week.

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Question 6 - Looking after a sick or aged relative

For the purpose of this question, a relative is a legal or blood relative eg husband and wife, mother and daughter etc. An adopted child is a legal relative but a foster child is not. A couple who are cohabiting, even though they may call themselves husband and wife at Q6 of the A schedule, are not regarded as being legally related.

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Question 7 - Permanently unable to work

Editing

Any answers here will be printed out. Check that the reason given is a valid health reason. Valid reasons include "my health" whereas invalid reasons are "my children". If the reason given is unacceptable, recode Q7 as 2. If no answer given then leave blank.

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Question 9 - Occupation

The informant should only be coded as having more than one job where more than one job is held concurrently ie, someone who changes or who is going to change jobs should be treated as having only one job.

Persons who normally work for more than one employer eg domestic helps, jobbing gardeners etc, should be coded as having only one job.

If an informant has changed jobs but has not yet been paid in his new job, it is the details of his new job that are required. Refer to RO for information on his present job if it is missing. Only accept details of his old job if no information is obtained from referral back to the informant.

Occupation The occupation will have been coded by the interviewer according to the OPCS classification of Occupations (1980). The full 3 digit coding frame has been used. If the occupation has not been coded then enter the correct code in the 'Code Occupation' Box. If there are any doubts as to the correct code - refer to your supervisor. The job title is the occupation to be coded, only use the description as a clarification. If the informant is a director, then check that 1 against director in ringed.

Employee/Self-employed If it has been necessary to change Q1 or exchange the details between main and subsidiary employment, it may be necessary to change the employment status.

Subsidiary jobs: Check that, if the description shows that the informant is a director, code 1 has been ringed.

Notes

1. Mail order agents and baby sitters should not be entered at this question but at Q74.
2. Local authority councillors used to be coded as self-employed but they should now be treated as local authority employees. Their occupation code will be 022.
3. A sub-postmaster who has another employment (eg grocer) should be coded as having 2 jobs, the most remunerative being coded as the major job in the usual way. If he is paid one salary only for both jobs because, for example, he is a manager in his retail job, he should be coded as having one job.

4. Occupation codes: 349 and 350

Occupation Codes 349 and 350 must not be used.

349 is 'inadequately described occupations'

350 is 'Occupations' not stated'

If a person's occupation has been coded as 349 or 350 or has not been coded at all you should proceed as follows:

First, check with your supervisor/RO as to whether a letter should be sent to that person.

If a letter should not be sent or if no reply is subsequently received from that letter then

Occupation, Q9(a) should be coded - 348

If the person is an EMPLOYEE

Employment status, Q9(a) - code 1 (employee)

Q9(b) - code 3 (other employee)

Q9(c) - code 1 (1 or 2 employees)

If the person is SELF-EMPLOYED

Employment status, Q9(a) - code 2 (self-employed)

Q9(d) - code 3 (no employees)

Note - 1. Occupation code 348 is:

'All other in miscellaneous occupations nec.'

2. If a person is a school leaver and is coded 3 at Q1(b) in the 'B' schedule then the next question answered should be Q51 so the Occupation code will be blank ie zero.

Editing

Any incompatible codes between Q9(a), Q9(b), Q9(c) and Q9(d) will be rejected. Check carefully the coding of the occupation, employment status and supervisory role. Use appendix B1 of the OPCS Classification of Occupations (1980), pages lxxxiv-civ, to see whether combinations of codes are allowable (reading carefully the notes on pages vi-xiii). It will normally be the code entered by the interviewers that would be expected to be in error. If it is the employment status that needs changing the first refer to supervisor.

Questions 10-17 - Pay details (most remunerative job as employee)

At Q10 there is a code for anticipated pay. This is where the informant has recently started a job but has not been paid for it yet. In this case the pay they will receive may have been entered and the 'anticipated pay code' ringed. The pay date to be entered will be the date of interview.

Charitable deductions from pay has been removed from the "other deductions" section and allocated its own question - Q16.

CODING

At Q17 check that codes 1-5 have been ringed for any deduction from pay and enter the relevant Diary code in the the first Office Use Box for any other deductions made from pay. If it is possible to reclassify any of the other deductions from pay to codes 1 to 4, then do so, deleting code 5 if necessary.

Notes:

1. No pay received for current job. It is the details of the current job that are required here. If there is no information or only information relating to a previous job, refer to R0. Details from the previous job should only be accepted if no information is obtained from referral.
2. Pay details when main and subsidiary job with same employer. If the informant has a main and subsidiary job with the same employer (eg school teacher and evening class lecturer) it is normal for all deductions eg tax, NI etc, to be shown on the pay slip for the main job. In this case, do not apportion the deductions between the two jobs.
3. Non - UK currency. Where an informant is working in the UK but paid in non-UK currency, the income remitted to the UK should be converted to UK currency using the exchange rate for the date of pay which can be obtained from the Financial Times.
4. SSP included in pay. If there is an indication that SSP is included in the last pay, check that code 1 or 2 is ringed at Q25.
5. SMP included in pay. If there is an indication that statutory maternity pay is included in the last pay, check that code 1 or 3 is ringed at Q25.
6. Composite entries at Q17. If the informant has given the total amount of deductions and what items this covers, but has been unable to split the amount between the items, estimate the proportions as realistically as possible. For example, if a figure covers superannuation and the firm's sports club then most of the deduction should apply to superannuation and only a small portion, say 5p-25p for the sports club. If there is no basis to do the apportioning then divide the amount equally between the items. Staff pension/superannuation is normally about 5-6% of grosspay.

7. Widows and orphans. If the amount deducted is small (ie up about 20p per week) it should be treated as contributions to a benevolent fund (ie charity). Delete the entry from 'Other deductions' (Q17 - code 5) and complete Q16. Enter the amount itself at Q16(b)(i) - 'other charity schemes'.

If the amount deducted is fairly large it is most probably an insurance in which case it should be treated as superannuation (for 'widows and orphans' this is usually about 1½% of gross pay). Delete the entry from 'Other deductions' (Q17 - code 5) and enter it in the superannuation box (Q17 - code 1).

If the informant is in the police force or fire service the entry should be treated as life insurance and coded 924 at Q17 - code 5. The details should also be entered at Q73 (A schedule).

8. Treat as Life Insurance, Fatal Accident Scheme for miners and police officers and also PO Insurance Society.

9. RAF Dependent's Fund should be entered as a charity (see Note 7).

10. Workers who periodically work away from home (eg in the armed forces, merchant navy or on oil rigs) may make an allowance/allotment to their spouse which is shown as a deduction on their pay slip.

If the informant is at home at the time of the interview the total pay, including the allowance/allotment, should be shown at Q10-17 and Q71 should be left blank. If the informant is an absent spender then follow the instructions given at Q1 (code 7)

11. Compulsory tax for a company car or luncheon vouchers should be shown at Q14.

12. The pay period that is entered should be the actual one (this is not necessarily the usual one) eg the informant may receive 3 weeks wages in one week because 2 weeks are holiday pay, therefore the period code that should be entered is 3. Periods of less than one week should be coded as 1 week.

13. Roundings up or down. These should be coded 999.

14. If the deduction is for a loan, details should be shown at Q85 (A Schedule). If the loan is for a car purchased during the last 3 months and the employer does not grant loans to the general public, then the details should be entered at Q81 (A schedule). If the loan was for a season ticket, Q83 (A schedule) should be completed. In both cases diary code 960 should be entered at Q17.

15. Deductions for using company bus or coach should be coded 954. Details should also appear at Q83 (A Schedule).

16. If an amount is given for 'other deductions' at Q17, but it is not known what the deduction is for, code to 799.

Editing

A Print message will be given if Q14(a) is coded Yes. Check the reason why no tax was paid. Refer to supervisor any doubtful cases.

If DK's are ringed at Q16(a)(i) or Q16(b)(i) then refer to RO for an imputed value.

Questions 18-21 - Refunds of expenses included in last pay

These questions apply to all who are currently employed or those who have been unemployed for 13 weeks or less (see Q4(a)) but were employed in their last job.

Do not abate any expenses because of amounts shown at these questions. Also do not abate the last gross and net pay.

Editing

A Print message will be given of all entries at these questions.

If a mileage allowance or fixed allowance is included in net pay (code 1 at Q18) a car sheet should be completed (see Appendix D).

Any entries at Qs 20 and 21 should be inspected to see whether they are business or private. Definitions of private and business expenses are given at Q120 (A Schedule). Most business entries would be expected to appear at Q120.

Refer to supervisor any cases where no entry appears at this question and you feel it should do.

Questions 22-23 - Usual hours worked

Round fractions of hours to the nearest whole number. If the fraction is $\frac{1}{2}$ then round to the nearest even number.

Editing

If no hours are given refer to supervisor.

Jan 1988

Question 25 - Items affecting last wage/salary

If 25(a)(i) coded 6 check that NI benefit is not shown as a deduction from last pay at Q17 nor included in the gross pay at Q17(a).

Editing

An error message will be given if Q25(a)(i) is multicoded. If it is, accept the first item and delete the others.

Jan 88

Question 26 - Wage/Salary usually received

The term "usually receive" in this context is, of course, subjective and the answer to the question will depend largely on what the informant understands the term "usual" to mean. In general the informant's answer should be accepted without question.

However in cases where it is in the nature of the employment to receive for a number of weeks each year a different rate of pay than for the other weeks of the year, then an average weekly (monthly, etc.) pay should be calculated at Q26 based on one year's income. The most common examples of this are ancillary workers at educational institutions (eg. school meals attendants) who receive 41 weeks full pay and 11 weeks part pay. Another case in point is a supply teacher who usually receives a higher rate of pay than ordinary teachers whilst working but no pay at all in the holidays.

The circumstances of these cases are normally only apparent through an interviewer's note on the schedule: however, if there is no such note and Q26 has been answered unequivocally, then that answer should be accepted and no attempt made to adjust the average pay to Q26.

Jan 88

Question 27 - Profit - related pay or profit sharing bonuses

The purpose of this new question is to identify whether any profit-related pay or bonus is tax-free.

Editing

A print message will appear for all informants receiving these bonuses. Check to see whether the entry is valid or not.

A print message will also occur at the 'DK' questions - Q27(a) and Q27(b)(i). This is a warning to look at any marginal notes in case an amount should be entered at these questions. If not, leave the questions blank, do not impute a value.

Jan 88

Question 28 - Other Bonuses

Editing

A Print message will be given of all informants receiving these bonuses . Check to see whether the entry shown is valid or not. An error message will indicate where the informant does not know whether the bonus is before or after tax. This needs to be recoded to 'before' or 'after' but, if in doubt, refer to supervisor.

- Notes:
1. Only actual money income should be shown here. Delete entries showing cash value of vouchers for spending in a shop, shares in the Company, income in kind and income from "windfalls".
 2. Directors fees and profits to working directors should be shown at this question.
 3. Accept entries for Fireman's and First Aid bonus.
 4. Any money received by a Minister of Religion for carrying out a wedding, funeral etc should be entered here as a bonus, if he is an employee, or at Q44 as part of his profit if he is self employed, provided that he keeps it himself.

Questions 29 - Any bonus included in usual net pay

Do not abate usual pay at Q26(a).

Editing

A Print message at Q29 will indicate whether any bonus was included in usual net pay.

Q28 asks about 'occasional' bonuses and Q27 about profit - related bonuses so if there is a 'Yes' answer at Q28 and Q27 is answered 'No', this would indicate that a bonus is received occasionally. However a 'Yes' answer at Q29 indicates that the bonus is included in the usual net pay and should therefore be received regularly.

It is therefore necessary to check that the answers to Q26-29 are consistent with one another.

Jan 88

Questions 31-34 - Tax relief for expenses, luncheon vouchers, free meals and free food

These questions apply to all who are currently employed or those who have been unemployed for 13 weeks or less (see Q4(a)) but were employed in their last job.

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Question 31 - Tax relief for expenses incurred as an employee

Note that the amount required here is the amount on which tax relief is allowed, not the actual amount of tax relief received.

Editing

If the amount is not known, impute the amount, using a K1, from the following frame:

<u>Item being claimed</u>	<u>Per annum¹</u>
Clothing (including footwear - either on their own or together)	£21.00
Tools	£32.00
Professional societies	£17.00
Clothing/tools combined	£37.00
Boots	£33.00
Others	£33.00

Notes : 1. Do not use amounts shown at this question to abate any other entries in the budget.

2. Employed persons tax allowance for car expenses

It is unusual for a tax allowance for car expenses to be claimed at this question but if this occurs the following action should be taken:

- i. Prepare a car sheet and abate annual car expenditure on the basis of the amount shown at Q31.
- ii. Refer to supervisor for income tax and net wage to be adjusted ie. the tax allowance will be reduced and hence the amount of tax paid increased and the net pay decreased.
- iii. Delete the element for tax relief for car expenses from Q31.
- iv. The procedure described above has to be carried out manually.

(1) The previous figures were increased by 32% in Jan 1988. This was the approximate increase in the index of retail prices between Jan 1982 (when it is believed they were last updated) and Jan 1988.

Question 32 - Luncheon vouchers

Only luncheon vouchers issued free by the informant's employer should be entered here. Any items purchased using luncheon vouchers should be entered in the Diary with the full cost of the item.

Jan 88

Question 33 - Free meals

Any entries of free cups of tea/coffee or free sandwiches should be deleted. Also delete entries of free meals to resident employees such as au pair girls or farm workers.

Free meals to people on TOPS or YTS schemes should be deleted and the imputed value (see CSO list) should be added to any benefit received at Q55(c) and also entered in the diary.

Question 34 - Free food

If the quantities of free food given are not in pints, dozens or lbs, convert the quantities given to these measurements. Do not enter fractions in these boxes. If after conversion, something other than whole numbers is arrived at, delete the entry, ring 'other' (code 1) and enter description of food and quantity.

Editing

If the free food is provided to a farmer, the value of the food is calculated automatically. If the free food is not for a farmer or the 'other' code has been ringed, a print message will appear. In this instance it will be necessary to estimate a value (based on shop prices - see CSO list) for the food and this estimate will be entered in the Office Use Boxes and onto the database using K1. In this case delete the entries against milk, eggs or potatoes and, if not already ringed, ring other code 1.

Questions 35-42 - Subsidiary employment pay

In 1988, the layout of the subsidiary employment questions is very similar to the layout of the main employment questions (Q10-17).

If there are any deductions from pay, check that the relevant codes 1 to 5 have been ringed.

If there are any entries under 'other deductions' these should be reclassified where possible to codes 1 to 4 and code 5 should be deleted. If they cannot be reclassified, enter the relevant diary code in the first Office Use box.

Notes: 1. If the informant has a main and subsidiary job with the same employee (eg school teacher and evening class lecturer), it is normal for all deductions eg tax, NI etc, to be shown on the pay slip for the main job. In this case do not apportion the deductions between the two jobs. Enter the net income for the subsidiary job at Q36.

2. Army reserve should be treated as a subsidiary job.

3. If an amount is given for other deductions at Q41, but it is not known what the deduction is for, code to 799.

4. Widows and orphans A deduction for widows and orphans from subsidiary employment pay is likely to be rare. If it does occur follow the procedure described at Q10-17 - note 7.

If it is a contribution to a benevolent fund note that Q40 should be completed - not Q16.

Editing

If DK's are ringed at Q40(a)(i) and Q40(b)(i) then refer to RO for an imputed value.

Questions 44-50 - Self employment

It is no longer necessary to calculate a profit from Q45 if no profit is shown at Q44. Also do not abate any figures because of the inclusion of a partner's figures.

- Notes.
1. If a person is unemployed on the date of interview (code 3 at Q1(b)) and was self-employed in his last job but has not worked for a year more before the interview date (see Q4) then Q44-50 should be left blank.
 2. Any money received for a wedding/funeral etc by a Minister of Religion should be entered here as an annual amount if the informant is self-employed.
 3. Occasional letting of rooms (See also Q68)

Informants who deal in the occasional letting of rooms must be treated each time according to the merits of the case. Generally, if occasional lets are regarded by the informant as a business, they should be accepted as such and the information entered at the self-employed questions.

Treatment may then vary according to income and Diary expenditure, eg. if income very small, ignore Diary expenditure as it will not reflect a major business. A schedule questions should be amended accordingly, eg. if there are no rooms used for business abate by $\frac{1}{2}$ a room, or according to claims against tax if any, at Q50. A schedule cases of lettings for part of the year only should always be referred to a supervisor.

Editing

If no profit has been given at Q44 (ie one of the Nil profit, Loss or DK boxes has been completed) but the amount drawn from the business is shown at Q45 then the profit will be imputed automatically by the 'calculation' program.

If the profit figure is not given and the amount drawn from the business is not known then a calculation message will be produced showing the gross annual household expenditure and the turnover. In this case the profit must be imputed manually using a K2.

The profit is the gross annual household expenditure less any current income received by the household provided this appears to be a 'sensible' figure when compared with the turnover and the type of job the informant is doing. The figure must also be based on the number of months shown at Q48. For full details as to what to include when imputing profit, see Appendix D. Always refer these cases to your supervisor.

- Notes
1. If an informant has two self-employed jobs a print message will appear. Any profit from the subsidiary job should be entered on a K1 and also in the OFFICE USE box at Q44.

If an informant has a self-employed job but also has an employed job which is more remunerative, then the profit from the self-employed (subsidiary) job should have been entered in the 'Profit' box at Q44.

2. If an informant receives an enterprise allowance but does not make any profit from his business, refer to supervisor.

3. If a self-employed informant states that all his expenses are paid by the business, so rates, telephone etc are shown as nil, the following procedure should be adopted (if in doubt refer to supervisor):

i. Impute these amounts (rates, telephone etc) manually using other evidence given on the schedule or based on current gross weekly household income (Appendix C).

ii. Enter the imputed amounts at the relevant A schedule questions and the total weekly amount, covering all these expenses, at Q45(c)(i).

iii. Gross up the weekly figure to an annual amount and add it to the profit given at Q44. Enter the adjusted profit on a K1.

iv. If the informant has made a claim for rates, telephone etc at Q50, these items will be abated automatically.

Question 50 - Business Expenses claimed against tax

1. If any claims are made check that the relevant code is ringed. Round any fractions to the nearest whole number.
2. Do not abate any expenditure at the coding stage.
3. If only an amount is given, convert this to a percentage and enter the percentage in the coding column.
4. If neither a percentage nor an amount are given leave the coding column blank. Check that the appropriate code (eg telephone - code 9) is ringed.
5. If the amount to be claimed covers several items eg rent, mortgage, rates etc, refer to supervisor.
6. If a claim is made for more than one vehicle delete code 1 and any percentage which may have been entered in the coding column, and then ring code 10. The abatement will be dealt with at the editing stage.

Editing

1. A print message will appear if a claim for business expenses is made against tax.
2. Unless the informant states otherwise, assume only one car (when more than one is owned) is allocated for business expenditure. Where there is more than one car, the car with the largest expenditure against it should be assumed to be for business.
3. If an informant owns a car but another household member claims business expenses on it, proceed as follows.-
 - a. the owner's car expenditure in the 'A' schedule should be abated by the amount stated by the claimnt.
 - b. the claimant's car expenditure in the 'D' book should be abated by the amount claimed.
4. Abate all household expenditure according to the rules given under "Actions 1 to 3".
5. All abatements should be entered on a K3. Do not abate any 900 series codes.

ACTION 1

Where less than 100% of expenditure is claimed for tax

i. Rent, Mortgage, rates, water charges, structural insurance

Abate the appropriate entries in the A schedule by the percentage given. Delete the original entry in green and enter the abated amount immediately above it. Make a note along side when the amount has been abated.

Make sure that the mortgage claim refers only to the business element and not to personal tax allowance.

Water charges for agricultural establishments are normally too high for the usual method of abatement to result in a true domestic element. Abatement should, therefore, be in two stages:

- a. Multiply Net Rateable Value by Water Rate poundage
- b. Abate the answer to (a) by the percentage at Q.50 and enter the abated answer at the appropriate question.

Note that where rates or rent including rates are abated, the Gross Rateable Value (GRV) and Net Rateable Value (NRV) at Qs 124 and 125, 'A' Schedule should also be abated by the same proportion.

ii. Cars

All car expenses shown in the 'A' or 'D' schedules should be abated by the percentage shown at Q.50 (eg petrol, insurance, repairs, spares, depreciation, etc.) and also refund of vehicle licence (road tax) and car sales.

Do not forget that when a car has been purchased using a loan or HP, all monetary values at Qs 85 or Q86A relating to that car are to be abated.

Note: Claims for car expenses at page 36 of the D books should not be used for abatement. Note if a person is self-employed the abatement of car expenditure is based on Q50.

iii. Fuel Expenditure (Gas, electricity and central heating oil)

Where 90% or less of expenditure is claimed, abate by the percentage given at Q50. Treat 91% or more as if 100% of expenditure is claimed. See Action 2(iii).

Slot meter payments for gas and electricity in the D books and also the rebate at Q52/62 (A schedule) should be abated by the percentage at Q50.

In the case of a budgeting scheme, both the last payment and the charge on the last advice should be abated.

iv. Telephone

Abate the appropriate entries by the percentage given at Q50.

If the bill is paid by account abate:

last account payment

household's share of the account (where relevant)

If the bill is paid by a budgeting scheme abate:

last payment

charge on the last advice.

household's share of the account (where relevant).

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ACTION 2

Where 100% of expenditure is claimed for tax

1. Rent, mortgage, rates, water charges, structural insurance

Where an informant makes a 100% claim for any of the above items, the expenditure recorded at the appropriate A schedule questions should not be deleted (ie by 100%) but should be abated by an adjusted amount as detailed below:

a. Mixed premises other than farms (eg shop/flat/house)

The number of rooms used solely or partly for business should have been recorded at Q13 or 14, A schedule. (A room used partly for business counts as $\frac{1}{2}$ room). If not stated, the number of rooms used for business should be estimated. (Refer to the supervisor for estimation which will take into account the type of business, profit, total number of rooms, composition of household by age and sex. The maximum number of rooms estimated should be two).

The number of room used for business should be calculated as a percentage of all rooms excluding 'other' rooms. This percentage should then be used to abate relevant expenditure, eg if there is a total of 10 rooms and one is used for business, then expenditure is abated by $\frac{1}{10}$ or 10%.

The GRV and NRV at Qs 124 and 125, A Schedule should be abated in the same proportion as the rent/rates payments.

b. Farms

Any amounts given for rates, water charges, RV and structural insurance at the appropriate 'A' schedule questions should be abated by $\frac{1}{3}$.

Where rent or mortgage payments are shown separately for the farmhouse, they should also be abated by $\frac{1}{3}$. However if the rent or mortgage payment includes farm buildings etc., then the Gross Rateable Value, abated by $\frac{1}{3}$ should be substituted for the annual equivalent of the last payment, to cover the domestic element at Q35, A Schedule.

The amount of interest shown at Q37, A schedule should then be reduced by the percentage difference between the annual equivalent of the last instalment paid and the GRV, and the resultant figure abated by $\frac{1}{3}$.

Example: Annual equivalent of last mortgage payment - £500
Interest = £300 GRV = £250

$\frac{2}{3}$ of £250 (GRV) = £166.67 to be entered at Q35, A Schedule (using a K3)

Difference £500 (mortgage) - £250 (GRV) = £250

percentage = $\frac{250}{500} \times 100 = 50\%$

.. 50% of £300 is £150

Code $\frac{2}{3} \times £150 = £100$ at Q37, A Schedule (again using a K3)

Gross Rateable Value is also known as Gross Annual value (GAV). If Gross Rateable Value has been omitted from Q124, it can be obtained from Appendix D.

Where 100% claim is made for water charges, the 2-part abatement procedure described at Action 1(i) should be followed, except that in the second stage the abatement should be by 1/3.

Example: Man pays rent £1000 pa.) claims 100%
 rates £200 pa.)
 water rates £ 40 pa. claims none
He uses 2 out of a total 8 rooms for business

.. rent and rates should be abated by 2/8 rooms = 25%.

he actually pays £750 (rent) + £150 (rates) = £900 pa.

Note that instructions a. and b. apply where the rateable unit is occupied solely by one household. If the rateable unit covers more than one household, refer all calculations to the supervisor for approval.

ii. Cars

For 100% claims, all monetary entries concerning cars in the A and D schedules should be deleted. Refunds of vehicle licence (Q80, A schedule) and sale of vehicles (Q82, A Schedule) should be deleted in the same manner. If a car has been purchased using a loan or HP then delete all monetary entries at Qs 85 or 86A (A Schedule).

iii. Fuel Expenditure (Gas, electricity and central heating oil)

Where 91% or more is claimed at Q50 abate by 90% in all cases.

iv. Telephone

Abate according to the number of rooms used for business or by 1/3 in the case of a farm.

Example: A man claims 95% for expenditure on central heating oil and 100% for expenditure on telephone. He uses 2 out of a total 8 rooms for business.

1. Central heating oil should be abated by 90%.
2. Telephone should be abated by 2/8 rooms, ie 25%.

ACTION 3

Amount to be claimed unknown

Where the amount to be claimed is not known, the following action should be taken:

i. Rent, mortgage, rates, water charges and structural insurance should all be abated room-wise as already described for a 100% claim in Action 2(i)(a) above (or Action 2(i)(b) for a farm).

Where no rooms are recorded as being used for business at Q13 or 14, (A schedule,) the budget should be checked with the informant. If the informant does not reply, the number of rooms used for business should be estimated by the procedure described at Action 2(i)(a) above.

ii. Fuel expenditure (Gas, electricity and central heating oil) should be abated according to the number of rooms used for business or by 1/3 in the case of a farm.

iii. Telephone expenditure should be abated by 2/3 where the percentage is not known.

iv. Car expenditure should be abated by 1/3 where the informant claims but does not know the percentage.

Jan 88

Questions 51-58 - State benefits

The interviewer's entry should be accepted as correct. The only time when a figure should be amended is either when an interviewer's note indicates that the amount includes Supplementary Benefit and this should be shown at Q56(d) or when two or more benefits are combined and these should be separated and transferred to their respective benefits. Refer to Appendix E for amounts of each benefit.

With all benefits (Qs 51-58), if in doubt refer to the social security leaflets that are available or to the 'Guide to Social Services'.

Editing

To ease the interviewer's workload, each benefit section is introduced by a filter question and prompt card asking whether the informant has received any of the benefits listed on the card. Only when this question is answered 'yes' will all the benefits on that card, be answered 'yes' or 'no' according to whether the benefit has been received.

Jan 88

Question 51(b) - NI Retirement pension

If invalidity allowance is included in the retirement pension the allowance should be transferred to Q53(c).

Job release allowance should be included at Q58(d).

Jan 88

Question 51(c) - NI widow's benefits

A widow's pension becomes a retirement pension when the woman reaches 65, but this could happen at the age of 60.

Jan 88

Question 52(b) - Mobility allowance

Motability is an agency through which Mobility Allowance recipients may purchase cars and obtain car insurance and other services at a reduced rate. Informants using Motability should be coded as receiving the Mobility Allowance. Payments to Motability are not coded separately but treated as normal car expenditure.

Question 52(d) - Attendance allowance

Attendance allowance is payable to adults or children who are severely disabled and is usually in addition to other National Insurance benefits. There are two rates of allowance.

It should be coded to the person who is entitled to it unless he/she is a child under 16, in which case the benefit should be entered in the mother's/father's column.

Jan 88

Question 53 - Sickness benefits

There are three sickness benefits available:

i. Statutory sick pay (SSP)

This is paid through the employer for a maximum of 28 weeks in a tax year. After the 28th week it is replaced by Contributory Invalidity Pension.

ii. NI sickness benefit

This is paid by the DHSS for a maximum of 28 weeks. It is usually paid to self employed or unemployed persons, but may also be paid to employees if they do not qualify for SSP.

iii. Contributory invalidity pension

This is paid by the DHSS and starts in the 29th week of sickness. There is no limit to the number of weeks it can be received.

Invalidity allowance is paid in addition to invalidity pension, the amount being dependent upon the age of the recipient at the time invalidity commenced. At retirement age someone in receipt of invalidity pension can continue to receive it for a further 5 years if it is higher than the retirement pension they would be entitled to. If they opt to receive their retirement pension, any invalidity allowance will continue to be paid as part of this pension and will be called 'invalidity addition'. If it is included in the retirement pension it should be transferred to Q53(c).

Income support/supplementary benefit should be excluded from this question and shown at Q56(d).

Question 55 - Government Training Schemes

Editing

Normally, any one who is on a government training scheme and is receiving an allowance would be coded 3 at Q1. However if the informant has another job then they will be coded as an employee or self employed at Q1 and pay details given at the relevant question.

Jan 88

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Question 56(a) - Industrial injury disablement benefit

| This benefit or pension can be paid weekly or as a lump sum gratuity.

It can be received by persons working full-time or part-time as well as those who are not working. The amount received depends on the degree of disablement.

Jan 88

Question 56(b) - Unemployment Benefit

| Benefits for weeks spent on JTS, TOPS and YTS schemes should be excluded.

If supplementary benefit is included then it should be transferred to Q56(d)

| A person on short time can receive a wage as well as unemployment benefit.

If a person receiving unemployment benefit is also working then he should be coded 1 at Q1.

| Self-employed persons do not qualify for this benefit.

Jan 88

Question 56(c)- Family Credit/Family income supplement

Do not include supplementary benefit at this question, it should be shown at Q56(d).

This supplement is available to families including one parent families with at least one child under 16 (or over if still at school) where the head of the family (or either spouse in the case of a married couple) is in full-time work, but the total family income is below a certain level.

For a single parent full-time work means 24 hours a week or more and for a married couple, 30 hours a week or more.

Once awarded this benefit will continue to be paid for the agreed period irrespective of any change in financial circumstances, but it is not changed when benefits are uprated annually.

also include if 1 person in HH has been employed same time in last 12 months

Jan 88

Question 56(d) - Income support/Supplementary benefit

There are two types of benefit:

- a. Supplementary Pension which is payable to men and women of retirement age whose income is below the level of requirement approved by Parliament. It can either be the full pension or an addition to the retirement pension received.
- b. Supplementary Allowance is payable to people aged 16 and over but below retirement age whose income is below the level of requirement. People are not normally entitled to benefit if in full-time work.

Notes

1. Supplementary benefit may be paid with other benefits but it should not be included at any other benefit questions.
2. Blind allowance should be coded at this question and not at Q58(d).
3. Items of household expenditure, paid directly (either in whole or in part) by Supplementary Benefit, should be shown at the appropriate A schedule questions. The expenditure should also be included in the amount shown at Q56(d) on a comparable time basis. This does not apply to rent and rates which is covered by housing benefit at Qs17A, 21, 25 and 26 of the A schedule.
4. If an informant's separated husband pay an allowance direct to the Social Security Office it should be entered at Q56(d).

Question 57 - Maternity allowance, grant, maternity pay and statutory maternity pay

i. Maternity allowance

This is a weekly benefit which is usually paid for 18 weeks starting 11 weeks before the baby is expected. It may be paid in addition to maternity grant.

ii. Maternity grant

This is a lump sum paid for each birth to help with the general expenses of having a baby.

iii. Maternity pay

Under the Employment Protection Act, a woman having a baby is entitled to receive maternity pay from her employer provided that she:

- a. normally works 8 hours a week or more
- b. has worked continuously for that employer for two years or more
- c. continues working up to the 11th week before the baby is due
- d. returns to work.

iv. Statutory maternity pay

This came into effect in April 1987 and is paid by the employer for 18 weeks. It is gradually replacing maternity pay and in some cases, maternity allowance. It is paid at two rates. The qualifying conditions are similar to those for maternity pay.

It is possible therefore for a woman to have received both maternity pay and statutory maternity pay during the last 12 months.

- Note
1. It is possible to receive maternity benefits even though there are no children in the household under 1.
 2. Supplementary benefit, if included in maternity pay, should be entered at Q56(d).

Question 58(a) - Death Grant/Grant from Social Fund for Funeral Expenses

| As there is now no upper limit on Death Grant, accept whatever amount is given.

Jan 88

The Christmas Bonus is paid to retired persons and certain other people on state benefit.

Jan 88

Question 58(c) - Invalid care allowance

Invalid care allowance is paid to people of working age who cannot work because they have to care for a severely disabled relative ie some one who would be receiving an attendance allowance.

Question 58(d) - Any NI or State Benefit not mentioned earlier

Examples of benefits that can be included here are:

Child's special allowance
Disabled persons petrol allowance
Enterprise allowance
Guardian's allowance
Industrial death benefit
Industrial Disablement Benefit (paid weekly)
Industrial widow's pension
Job release allowance
War clothing allowance
War Dependent's pension
War widow's pension

Editing

A Print message will be given of all entries at this question. Check to see whether the benefit should be allocated elsewhere otherwise accept at this question. Do not transfer any benefits not being received at present. Any lump sum payments should be deleted.

Jan 88

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Question 60-64 - Pensions

Although the layout of these questions has changed in 1988, the information require is virtually the same as in previous years.

Pension from a previous employer relates not only to private pensions received by the informant from their own previous employer but also to a private pension from the employer of a deceased spouse or other relative.

Q61 - see separate page.

Q62 relates to a pension as a member of a trade union or friendly society.

Q63 - exclude a pension from a previous employer.

Q64 - include tax refund on a covenanted payment.

Q61 - Employee pension from a previous employer

Occupational pension from overseas governments and companies should be accepted at this question, if paid in sterling.

If paid in foreign currency, the pension should be treated as unearned income and entered at Q69.

Deductions from pension at Q61(f)

If there are any deductions from pension proceed as follows:

i. A schedule items eg life insurance

Enter the amount deducted at the appropriate question (after adjusting for any period code differences) if it has not already been entered there.

ii. D schedule items eg charities

Enter the weekly equivalent of the amount deducted in each week of the diary.

Note Do not delete the amount shown at Q61(f)(ii) in either of the above cases.

Question 65 - Savings Accounts

Q65 asks about any savings accounts the informant has and any interest received or credited from these accounts.

For joint accounts 'Yes' will have been coded in both columns against the relevant account but the amount of interest will have been entered in only one column with a note indicating a joint account. Divide equally the amount of interest between the recipients. If the resulting figure involves fractions then round up the amount for the informant whose column the original entry was in, and round down the other figures.

Editing

If the interest figure is missing but the amount invested is shown then impute the interest based on interest rates at the time of interview, using a K2.

If the amount invested is not shown, impute the interest from the tables shown in Appendix D, also on a K2.

Note A 'Yes' answer to a particular account does not necessarily mean that interest has been received from that account. An amount should therefore be imputed only if the informant has received or has been credited with interest during the last 12 months.

Jan 88

Question 66 - Investments in National Savings etc

If joint savings are held then these are to be divided equally between the holders. The interviewer will have noted where this occurs. As exact figures are not given at this question, take the midpoint of the range, divide between the holders and enter the relevant code in each column.

Example: Person 1 has code 7 entered at Q66(b)(i) with a note indicating joint savings. This denotes an amount in the range of £2001-£3000. The midpoint is £2500 which is divided equally giving £1250. Enter code 6 under both persons 1 and 2.

If the joint savings is coded 11 (£20,001 or over) this range does not have a mid-point so refer to R0.

Editing

If the amount held in a particular investment is not known then enter code 12. If the investment is shown as an amount of money, refer to prompt card P to obtain the correct code to be entered.

Jan 88

Question 67 - Interest/dividends from Investments

Joint income should be divided equally amongst recipients, see Q65 for instructions.

Editing

If the interest figure is missing but the amount invested is shown then impute the interest based on interest rates at the time of interview, using a K2.

If the amount invested is not shown impute the interest from the tables shown in Appendix D, also on a K2.

Note: A 'Yes' answer to a particular investment does not necessarily mean that interest has been received from that investment. An amount should therefore be imputed only if the informant has received or has been credited with interest during the last 12 months.

Jan 88

Question 68 - Rent from property including sub-let accommodation

The amount shown here for sub-let property may have to be abated to exclude sub-tenants' rate payments (see Q24 A schedule)

Notes:

1. Allowable expenses which may be deducted include:
 - a. actual expenditure on repairs and maintenance
 - b. depreciation allowance on furnished lettings
 - c. insurance, agent's fees, ground rent, rates etc
2. Include all rent received over the last 12 months even if the property has been sold and therefore no longer owned by the informant.
3. Include amounts of rent for sub-let business rooms or garages.
4. If it is thought that letting/sub-letting is a job then all information should be transferred to the self-employed questions - see Q44-50.

Editing

If the amount of rent received is not known then leave blank.

Question 69 - Other unearned income

This question is designed to pick up any other type of income that may be received by the informant.

Include at this question:

- i. Income as a sleeping partner.
- ii. Income as owner of a business who no longer takes an active part in the business and has installed a manager.
- iii. Royalties from land as well as books provided these are not associated with the main or subsidiary job.
- iv. Occupational pension from an overseas government or company - if paid in in foreign currency. (If the pension is paid in sterling it should be entered at Q61).

Exclude.

- i. All lump sum gains from the sale of assets, eg sale of house, sale of stocks/shares etc.
- ii. Cash gifts from friends or relatives in or outside the household.

Editing

A Print message will be given for all entries at this question. Check to see whether they should be included here, transferred to another question or deleted, if in doubt refer to RO. All entries which should be included at this question must also be referred to RO.

Question 70 - Regular allowance from outside the household

Notes:

1. If payment is not received regularly, the interviewer should have recorded details and a weekly equivalent based on amounts actually received should be entered. This normally applies to maintenance allowance etc. Do not accept an amount which should be received but in fact is not. Accept only the last amount received.
2. Parental contributions towards a grant should be included here under the child's person number if the child is a spender and at Q111 and sometimes Q112 (A schedule) under the parent's person number. This applies whether the parents and child are in the same household or not. (See Q110-119 A schedule). Overseas grants should also be shown at this question.
3. Include special payments to ex-workers, eg. payments to steel workers from EEC funds. The tax is entered at Q75. However, compensation payments to ex - NCB employees spread over a number of years should be treated as pensions at Q.61.
4. It is not necessary for the informant to be in receipt of the allowance at this time; the question refers to the last 12 months and therefore past situations are accepted. Do not attempt to gross up any payments to cover the last 12 months.
5. If informant's separated husband pays maintenance allowance direct to the Social Security Office it should not be accepted at this question but entered at Q56(d).
6. Instructions for dealing with allowances from a non-spouse who is an absent spender and therefore a member of the household (eg a son sending money home to his parents) are given at Q1 (code 7).

Question 71 - Regular allowances from absent spouse or spouse who is not a household member

Details of any regular allowance paid by an absent spouse or a spouse who is not a household member to anyone present in the household should be recorded here. If the spouse who is present in the household draws money from a joint account the amount drawn should be recorded.

Instructions for dealing with allowances from a spouse who is an absent spender are given at Q1 (code 7).

Married informants not working whose last employment was abroad. Accept code 3, 4 or 5 at Q1(b) and record the last allowance sent to spouse (under spouse's person number) at Q71. Do not record any details at the pay questions.

Editing

A Print message will indicate any entries at Q71(c). Total the household expenses paid direct and enter this sum in the Office Use Box. This is to be entered onto the database using a K1.

Jan 88

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Question 72 - Free or concessionary coal or coke

Notes:

1. If there is any indication that the fuel was provided from a source other than an employer then the entry should be deleted.
2. Delete any cash given to informant in lieu of coal/coke.
3. Any haulage charge should be treated as (part of) the amount paid by the informant.
4. Only one of the boxes at Q72(a) should be completed. So if there is an entry, say, in both the 'lbs' and 'cwts' boxes the figure in the 'cwts' box should be converted to lbs and added to the figure in the 'lbs' box. Similarly, if there is an entry in the 'tons' and 'cwts' boxes, convert the tons figure to cwts and add this to the 'cwts' box.
5. If the weight is given in metric tonnes or milliers, convert to tons by multiplying by 0.984. If a number of bags is given, assume 1 bag = 50 kg and convert to lbs by multiplying the number of bags by 110 (Decimals should be rounded off to the nearest whole number).

Editing

A Print message will indicate whether any coke was received from an employer. Refer to your supervisor for an estimate of the value of this free coke. Enter this in the Office Use box, using a K1 to enter it onto the database at B00 Q072B2.

If combined coke and coal are provided then the same procedure is to be followed.

If only coal is provided free then the value will be estimated by the computer so the Office Use box should be left blank.

Question 73 - OAP concessionary bus travel

In some areas there is an option of a bus pass or refund towards TV licence. In these cases code according to what the informant uses. If they accept the TV licence refund then code 'No' and amend Q76, (A schedule) to exclude the amount of TV licence refunded to them. This also applies to any other expenses that the informant may have refunded.

| Exclude weekly or season tickets mentioned in the household schedule.

See also Q127, A schedule.

Editing

A Print message will indicate any code 5 at Q73(a). Where possible, they should be reclassified as codes 1 to 4.

Question 74 - Baby sitter or mail order agent

Income in the form of goods acquired from a mail order club should be deleted.

Babysitters and mail order agents are not considered to be self-employed, so do not transfer any details given here to the self-employed questions (Q44-50), regardless of the amount received.

Jan 88

Question 75 - Income tax paid direct to Inland Revenue

National insurance payments should not be included here but shown at Q78. Check that this does not duplicate tax payments elsewhere in the schedule, eg. in respect of interest on stocks and shares. Delete any entries if it is clear that there is duplication.

Include tax paid on benefit from a Job Release Scheme ie persons coded 6 at Q1(b).

Any income tax paid direct should be accompanied by a source of current income elsewhere on the B schedule on which it is possible that tax is paid direct eg income at Q44, unearned income at Q69 and income from pensions (Q61-64) where tax is not deducted at source. If there is no such current income, it must be assumed that the tax payment relates to a past situation and should be deleted.

Notes:

1. Tax reserve certificates should not be shown at this question. Transfer a weekly equivalent to each of the Diaries and code as 803.
2. Do not accept either here or in the Diary amounts set aside for payment of tax.
3. Value added tax should not be included.

Editing

A Print message will be given of any entries here. Check the reason at Q75(b) to see whether they should be included.

Question 76 - Income tax refunded direct by Inland Revenue or DHSS

Notes

1. Direct refunds of tax previously paid by employees under Pay As You Earn (PAYE) are normally due to change of circumstances, eg unemployment, redundancy, retirement, mortgage or marriage.
2. Refunds from DHSS are included. DHSS can refund Income Tax if informant is or was unemployed.
3. Tax refunds received through pay (see Q13) should not be included at this question.

Editing

A print message will appear if the refund was not in respect of unemployment or redundancy. Check that the reason for the refund is an acceptable one.

An acceptable reason is one where there is a current source of income against which the refund has been made (see Q75). Delete any refund if there is no current source of income to which it could possibly relate.

Tax refund on a covenanted payment should be transferred to Q64(a).

Question 77 - Regular payments of NI contributions

| Regular contributions only should be entered at this question.

Questions 78 - NI contributions paid direct to Inland Revenue or DHSS

This will apply mostly to self-employed people, who usually pay a basic weekly rate of National Insurance (Class 4) and when profits or losses are calculated at the end of the financial year, they pay a percentage of the profits.

Informants may, however, be making up missing contributions, even though employed or non-employed. These cases should also be included at Q78.

The entries at Q78 should therefore be lump sum payments for self-employment or non-employment and not deductions from wage or salary (see Q15 or Q39).

Editing

A Print message will be given for all informants paying NI Contributions direct. Check the reason for this payment and if not acceptable delete the entry.

Jan 88

Question 79 - Money sent abroad

Only money sent directly to an individual or a charity abroad should be accepted.

Money given to an individual or charity in this country and subsequently sent abroad (eg Christian Aid, Oxfam, Tear Fund) should be deleted.

In 1988, there is a new code which covers payments to both private individuals and charities.

Editing

Accept DK's at this question. No imputation is required.

Jan 88

Question 80 - Odd Jobs

Check that the person number is correctly entered and the item number is ringed for each entry.

The purpose of this question is to account for any income received from an 'odd job' which would not have been accounted for at the employee, subsidiary employee or self-employed questions.

An 'odd job' is defined as a job which is undertaken once only at one specific point in time and without any regularity or continuity. It is therefore non-recurring.

If a job is carried out repeatedly, even at irregular intervals and regardless of the number of hours worked, it should be treated as a regular job.

Note Students' holiday jobs should not be shown here but should be coded according to the situation at the time of interview (see note on 'working students' at Q1)

Editing

A print message will be produced for all informants answering 'Yes' at Q80. Check that the details, ie description, period covered and duration, for each entry comply with the above definition of 'odd job'. If these details indicate that the job is regular then follow the procedure described below. If additional information is required to determine whether it is an odd job or regular job, refer to R0.

i. Regular job at Q80(a) - HELD at time of interview

Transfer the information given at Q80(a) to the employee, subsidiary employee or self-employed questions as appropriate. Recode Q80 to 2 and delete the entry at Q80(a). If the code at Q1 needs to be changed, refer to supervisor.

ii. Regular job at Q80(a) - NOT HELD at time of interview

a. If coded 1 or 2 at Q1

a(i) If regular job at Q80(a) is an EMPLOYED job

Treat this as a past situation. Recode Q80 to 2 and delete the entry at Q80(a).

a(ii) If regular job at Q80(a) is a SELF-EMPLOYED job

Code Q9(e) as 2 and transfer the information given at Q80(a) to Q44-50 provided the job will continue. (If in doubt refer to supervisor). Recode Q80 to 2 and delete the entry at Q80(a).

Note - If both the main and subsidiary jobs are self-employed the profit from the latter should be entered in the OFFICE USE box at Q44 and onto the data base using a K1.

b. If coded 3 or 4 at Q1

b(i) Informant HAS WORKED in last 12 months

If the regular job at Q80(a) is the more recent job delete the details of the job shown at Questions 4, 4(a), 9 and 10 to 34 (if informant was employed) or 44-50 (if he was self-employed).

Transfer the information given at Q80(a) to Questions 4, 4(a), 9 and to the employed or self-employed questions as appropriate.

Whether the job at Q80(a) is the more recent one or not, Q80 should be recoded to 2 and the entry at Q80(a) deleted.

b(ii) Informant has NOT WORKED in last 12 months

Delete the details of the job shown at Questions 4, 4(a), 9 and 10 (if informant was employed)

Transfer the information given at Q80(a) to Questions 4, 4(a), 9 and to the employed or self-employed questions as appropriate.

Note - Q80(a) shows that the informant has had a regular job during the last 12 months.

c. If coded 5 or 7 at Q1

c(i) Informant HAS WORKED in last 12 months

Add the number of weeks worked and the total fees/salary (shown at Q80(a)) to the figures given at Q8(a) and Q8(b) respectively. Adjust for period code differences where necessary. Recode Q80 to 2 and delete the entry at Q80(a).

c(ii) Informant has NOT WORKED in last 12 months

Recode Q8 to 'Yes' and enter the number of weeks worked and the total fees/salary (shown at Q80(a)) at Q8(a) and Q8(b) respectively. Enter the period code at Q8(c).

Note - Q80(a) shows that the informant has had a 'regular' job during the last 12 months.

d. If coded 6 at Q1

Treat the 'regular' job shown at Q80(a) as a past situation. Recode Q80 to 2 and delete the entry at Q80(a).

Question 81 - Income to Children under 16

Check that there is an entry for each child under 16.

Check that the child's person number is correct and make sure that all information relating to that child is entered in the correct column.

Child Benefit, cash gifts and pocket money should not be included at this question.

Include any regular income, however small, eg from newspaper round, building society etc.

If there is more than one source of income for the same child then details of the other sources should be recorded in the margin. Adjust the amounts to take account of period code differences, where necessary, then add them together and enter the total amount at Q81(c). Amend the other questions: Q81(b)(1), Q81(d) and Q81(e) as appropriate.

If details of the other sources of income for the same child have been entered in the coding columns then these entries should be transferred to the first column in which the child's person number appears. Carry out the same procedure as that described in the previous paragraph, and finally, delete the entries in the other columns relating to that child.

Editing

For imputation of interest from savings see instructions at Q65.

Question 82 - Investments in National Savings etc for children aged under 16

See Q66 for instructions.

Question 83 - Assets/Savings - Summary

This question should be completed for all spenders and all children under 16.

The question is a summary of the answers given to the 'assets' questions which appear in the A and B schedules.

Interviewers are asked to refer back to these questions as they complete Q83. The answers given here should therefore agree with those given in the A and B schedules, eg if a person has a current account, code 1 should be ringed at Q103(a) on P50 (A schedule) and also at Q83. Do not check the answers at this stage.

Jan 88

Question 84 - Assets/Savings - Eligibility

This question should be completed for all spenders and children under 16 who have savings at Q83. Therefore, if 'No to all' (code 1) has been ringed at Q83 this question will not be answered.

A husband and wife should be treated as one unit but all other spenders and children in the household should be treated individually.

If there is a second married couple in the household they should also be treated as one unit. Both their person numbers should have been entered in the same column.

To complete the OFFICE USE grid at the top of P.59 (B schedule) it is necessary to refer to Q83-93. Instructions for dealing with these questions therefore precede those for completing the OFFICE USE grid.

Questions 85-93 - Assets/Savings

General Notes

These questions are included at the request of the DHSS who are trying to estimate eligibility for certain benefits. To achieve this they need to study the personal holdings of certain types of assets. The purpose of these questions is to provide information on the current values of the assets held by informants.

These questions are asked only if the current value of a person's assets (or the combined value in the case of a husband and wife) is between £1000 and £10,000 (code Y at Q84).

Although a husband and wife are treated as one unit at Q84 they should be treated as separate persons at Questions 85-93.

In 1988, these questions are being keyed so the information will be held on computer.

Although informants may not know the current value of their assets they may have given sufficient information to enable the value to be estimated. As the number of cases where estimates are required is likely to be fairly high it was decided to carry out the estimation at the coding stage.

At each question, check that the person numbers have been correctly entered and the line numbers ringed where applicable.

Jan 88

Questions 85, 86 and 90 - Assets/Savings

Accept the entries given in the 'Amount/Value' column.

If this column is blank and:

i. 'DK' has been written beside the question.

Delete the complete entry.

ii. There is no 'DK' at that question

Do not assume that the person does not know the information. Refer this to the RO who may then write to the informant. If no reply is subsequently received assume the information is not known and delete the complete entry.

Note Q85(a) should be completed only if there was some money left in the current account at the end of the week/month so any 'nil' or '0' entries should be deleted and the main question re-coded to X.

Question 87 - Index-linked and fixed interest National Savings Certificates

1. If (a) to (c) are completed refer to supervisor for an estimate of the current value.
2. If (c) is completed and one or both the other 2 columns are blank, transfer the amount at (c) to the OFFICE USE column.
3. If (c) is blank irrespective of whether the other 2 columns are completed or not and;
 - DK is written beside the entry - delete the entry
 - There is no DK - refer to RO

Question 88 - National Savings Save-as-you-Earn

1. If (a) to (e) or (a) to (d) only are completed refer to supervisor for an estimate of the current value.
2. If (e) is completed and one or more of the other 4 columns are blank, transfer the amount at (e) to the OFFICE USE column.
3. If (e) is blank and one or more of the other 4 columns are blank, and:
DK is written beside the entry - delete the entry
There is no DK - refer to RO

Question 89 - Building Society Save-as-you-Earn

1. If (a) to (d) are completed accept the amount at (d).
2. If (a) to (c) only are completed refer to supervisor for an estimate of the current value.
3. If (d) is completed and one or more of the other 3 columns are blank, accept the amount at (d).
4. If (d) is blank and one or more of the other 3 columns are blank, and:
DK is written beside the entry - delete the entry
There is no DK - refer to R0

Question 91 - National Savings Income Bonds

Income bonds can be purchased in multiples of 1000. The minimum holding is £2000 ie two income bonds.

1. If (a) and (b) are completed check that the amount at (b) is:

- equal to 1000 times the number of bonds shown at (a) and
- equal to or greater than the minimum holding of £2000

eg if the informant has 5 bonds the amount should be £5000. If there are any discrepancies, eg 2 bonds valued at £1000, refer to supervisor.

2. If (b) is completed but (a) is blank accept the amount at (b) provided it is a multiple of £1000, if not refer to supervisor.

3. If (a) is completed but (b) is blank enter the appropriate amount at (b) eg if the informant has 3 bonds enter £3000 at (b).

4. If, both (a) and (b) are blank and

DK is written beside the entry - delete the entry

There is no DK - refer to RO

Question 92 - National Savings Deposit Bonds

1. If (a) and (b) are completed refer to supervisor for an estimate of the current value.
2. If (b) is completed but (a) is blank, transfer the amount at (b) to the OFFICE USE column.
3. If (b) is blank irrespective of whether (a) is completed or not, and:
DK is written beside the entry - delete the entry
There is no DK - refer to RO

Question 93 - Gilt-edged stock, unit trusts, stocks, shares, bonds etc

1. If (a), (b) and (c) or (a) and (b) only are completed refer to supervisor for an estimate of the current value.
2. If (c) is completed and one or both the other 2 columns are blank, transfer the amount at (c) to the OFFICE USE column.
3. If (c) is blank and one or both the other 2 columns are blank, (or an inadequate description of the security is given) and:

DK is written beside the entry - delete the entry

There is no DK - refer to RO

Questions 87 to 89 and 92 to 93 - Assets/savings

Note to supervisors

If sufficient information is given to estimate the current value of an asset at:

i. Questions 87, 88 and 92

Telephone: Mrs Heather Brown
Department of National Savings (DNS)
(01-605 9316)

Enter the current value in the appropriate column.

ii. Question 89

Although this question relates to a Building Society SAYE account, the DNS may still be able to give an estimate of the current value provided the necessary information has been given. If they cannot then delete the entry.

iii. Question 93

Look up the price of the stock/share/bond etc in the Financial Times for the date of interview. Calculate the value and enter this in the OFFICE USE column.

Note At Questions 88 and 93 the informant may have given an estimate of the current value of an asset but it is still necessary to telephone the DNS to obtain a more accurate estimate, provided sufficient information has been given at these questions.

Completing the OFFICE USE grid at the top of P59 (B schedule)

This grid should be completed for all spenders and all children under 16.

Refusal - Code 1

If a member of the household has refused to answer one or more of the 'assets' questions (Q85-93) or Q84 itself, ring code 1 in the relevant column.

If a member of the household has refused on behalf of the whole household or just certain members of the household, ring code 1 for all the relevant persons.

If any of the assets questions were answered before the person refused, all the entries relating to that person should be deleted.

Note that if a person/household refuses to answer any of the assets questions (Q84-93) this does not constitute a refusal to the whole survey.

Ineligible - Codes 2 and 3

For persons coded X at Q84 - ring code 2 in relevant column

" " Z " - " " 3 " "

If no code has been ringed at Q84, check to see if 'No to all' has been ringed at Q83. If so, ring code 2 in the relevant column of the OFFICE USE grid. If, however, the person has a husband or wife in the household remember to check their joint eligibility before completing the grid.

At Q84 a husband and wife are treated as one unit so they are both included in the same column. At the OFFICE USE grid, however, they should be given separate columns with their own person number but identical codes (if ineligible)

Eligible - Codes 4, 5 and 6

If a person is coded Y at Q84 then code 4, 5 or 6 should be ringed in the relevant column. To determine which of these codes should be ringed it is necessary to refer to Q85-93 to see if there is a 'DK' at any of these questions.

Code 4 - applies to persons who know the current values of all their assets at Q85-93 or have given sufficient information to enable their current values to be estimated.

Code 5 - applies to persons who do not know the current values of any of their assets and have not been able to give sufficient information to enable any of their current values to be estimated, ie there is a 'DK' at each question (85-93) that has been answered.

Code 6 - applies to persons who know some of the current values of their assets or have given sufficient information to enable some of their current values to be estimated ie there is a 'DK' at some of the questions (85-93) that have been answered.

Note 1 If a husband and wife are eligible as a unit each must be coded 4, 5 or 6, but they will not necessarily be given the same code. For example, if the husband knows all his assets he will be coded 4 but if the wife knows only some of hers she will be coded 6.

Note 2 If a letter has been sent to an informant asking for further information then it may not be possible to determine the correct code until either a reply is received or it has been decided that the information is not known.

Editing - Questions 83 and 85 to 93 - Assets/Savings

The answers given at Q83 should agree with those given at the corresponding questions in the A and B schedules.

Similarly, if Q85-93 are completed the corresponding asset should be ringed at Q83. For example, if Q86 is completed the person should have at least one of the savings accounts at Q83 ie at least one of codes 2-6 should be ringed.

The converse of this situation, however, is not necessarily true, because a person may have a Building Society account (code 5 at Q83) but not be eligible in which case Q86 will not be answered.

There are edit checks linking Q83 with the corresponding questions in the A & B Schedules, and vice versa where possible, and there are also checks linking Q85-93 with Q83.

Editing will therefore consists of making the necessary corrections to any errors which occur eg an interviewer may have ringed the wrong code at Q83. Another possible error is that a code may be ringed at Q83 with no corresponding entry in the A or B schedule or at Q85-93, in which case the code at Q83 should be deleted.

Assets with a value of zero should have been dealt with at the coding stage but an edit check will identify any which still remain. Check to see if there is a 'DK' beside the question and if so, delete the entry. If there is no 'DK' refer to supervisor/RO.

Jan 88

SUMMARY OF DIARY CHANGES IN 1988

1. Credit card page

The credit card page has been deleted. Items purchased using a credit card during the record-keeping period will still be listed in the diary.

If interest is paid on a credit card account during the record-keeping period it should be entered at Section 2 on P. 36 of the Diary.

2. Alcoholic drink consumed away from home

New item codes are being introduced in 1988 to identify whether alcoholic drink consumed away from home was bought at an Off-Licence or Pub etc (ie licensed premises. Informants are therefore being asked to code where they bought their beer, wine or spirits etc (see grid on right hand pages of the diary). The codes for 'alcoholic drink brought home' have not changed.

3. Diary item codes

During 1987 a major revision of diary codes was carried out by the Retail Price Index Section at DE. These changes have now been agreed by the various government departments concerned and are being introduced in 1988.

In certain cases the codes have changed beyond recognition so it will be necessary to forget that the old codes ever existed and start learning the new ones from scratch! A list of the main changes to these codes appears elsewhere in these instructions.

4. 'Point of purchase' or 'Shop' codes

In 1987, food items were 'shop-coded' but in 1988 this practice is being dropped. Instead, another group of items entitled 'Daily shopping items', which appear on the right hand pages of the diary, will be shop-coded. The list of shops has been reduced to 12.

5. Qualifier Codes

Qualifier codes 4 and 5 have been deleted but a new qualifier code 12 is being introduced. This relates to interest paid on a credit card account and appears on P. 36 of the diary.

D SCHEDULE

A. GENERAL CODING INSTRUCTIONS

Check that there is a D Schedule for each member of the household aged 16 and over. If there is no diary because the member is a non-spender then complete a nil expenditure sheet for both weeks. If a D schedule has no expenditure in it, then remove the schedule and replace it with a nil expenditure sheet. If a member is an absent spender then no D schedule should be present.

Each record book should be checked as follows:

1. Check that the reference number agrees with that on the outside of the budget cover and that the correct person number has been entered.
2. Check that the starting date of the diary is the same as the "starting date of records" on the front page of the A Schedule. Also check that the dates run consecutively through the Diary and that no days have been omitted or repeated.
3. Check any explanatory notes given on page 38 of the diary.
4. If any number needs to be amended/inserted/clarified, rule the original entry through and write the amended/inserted/clarified figure in red above the original entry or, if necessary, on a new line. Do not alter in pencil.
5. Check that there are no "£" or "p" signs entered in the £ and p columns. Any entry in the pence columns must have two digits. If there are no pence check that 00 is entered.
6. It should not be necessary to delete any entries in the diary. They should all be coded with, if necessary, a qualifier in the final column on the right hand side of each page. If you feel an entry should not be coded refer to supervisor. If it is necessary to delete an item then delete all the information relating to it.
7. If a decision is made about an insufficiently described item write the reason for the decision by the side of the entry in red.
8. Do not abate any item because of refunds or business expenses either because of an entry at page 36 or because of answers to Q120 (A Schedule) or Q50 (B Schedule). This will all be carried out at the editing stage.
9. Multiple entries on the same line

Each item should be entered on a separate line and should be individually priced. When coding the item the code number should be entered on the same line as the amount paid.

If there is more than one entry on the same line, proceed as follows:

- (i) Where items are covered by the same code, no action is necessary.
- (ii) Where items have different codes but the amounts paid for each item are given, then re-write the items on separate lines with the appropriate amounts paid. If the individual amounts have been omitted then estimate the price from other similar purchases in the diary or try to find out what is usually paid for the item and enter this amount. If it is a food item then Shaw's Price List may also be consulted.

10. Monthly bills covering a number of items

- i. If a bill is paid and all the items are listed with their separate prices then code in the normal way. If the total amount of the bill has been entered it should be deleted (ie crossed through).
- ii. If a bill, paid during the record-keeping period, has not been itemised but the items acquired on account during the period have been listed together with their individual prices, then the cost of these items should be adjusted using the following formula:

$$\begin{array}{rcl} \text{Cost of item} & \times & \text{Value of bill} \\ \text{acquired on a/c} & & \underline{\hspace{2cm}} & = & \text{Amount to enter} \\ & & & & \text{in coding column} \\ & & \text{Value of goods bought on} & & \\ & & \text{a/c from shop in 2 weeks} & & \end{array}$$

Code these items in the usual way and delete the total amount of the bill.

- iii. If no bill is paid during the record keeping period then any items acquired on account should be item coded with qualifier code 9 entered against them.
- iv. If a non itemised bill has been paid during the record keeping period and the items acquired on account during this period have not been listed then refer to RO.

B. COMPLETING THE 'OFFICE USE' COLUMNS ON THE DIARY PAGES

When coding an item on the diary pages and in Section 1 (Expenses Refunded) on P.36, the code to be used in the 'OFFICE USE' columns is divided into three fields. (In sections 2 and 3 on P.36 the code is divided into two fields: the diary item and qualifier codes both of which are pre-printed).

The fields are:

- (i) 'Point of purchase' or 'Shop' code (first OFFICE USE column)
- (ii) Diary item code (second OFFICE USE column)
- (iii) Qualifier code (last OFFICE USE column)

1. 'Point of Purchase' or 'Shop' Code

In 1988, the only items that are to be given a 'point of purchase' code are listed below:

- 211 Cigarettes, cigarette tobacco and papers
- 212 Pipe tobacco
- 213 Cigars, snuff
- 622 Cosmetics
- 623 Toilet paper
- 624 Other toilet requisites
- 648 Stationery (personal and household)
- 742 Matches, polishes and cleaning materials (new code)
- 745 Toilet soap
- 746 Other soap and soap products

NB. Food items are not being shop-coded in 1988.

All items entered on the left hand pages of the diary together with those listed on the right hand pages under 'Daily shopping items (other than food)' should have the name of the shop where they were bought entered against them, irrespective of whether they are on the above list.

Although all the diary items on the above list should be entered in the 'Daily shopping items' section on the right-hand page, they may also occur on the left-hand pages of the diary. It is necessary, therefore, to look through both pages of the diary for each day to check whether any of the items entered are on the above list and if so, whether they were purchased at one of the 12 stores listed below:

Budgen	Lipton
Co-op	Marks & Spencer
Fine Fare	Presto
International Stores	Sainsbury
Key Markets	Tesco
Kwik Save	Woolworth (NB - not on 1987 list)

If the item was purchased at one of these stores enter a 1 in the first 'Office Use' column, if not, leave the column blank.

2. Diary item code

Enter the appropriate 3-digit diary item code in the second 'Office Use' column.

3.

Qualifier code

This is a 2-digit code indicating what type of expenditure or refund the item is. This should be entered in the last 'Office Use' column. If the column is left blank the item will be treated as normal expenditure. The list of qualifier codes is given below:

1. Self supply item of expenditure. Item obtained from own business. Applies to self employed person only
2. Item of expenditure to be claimed or refunded as a BUSINESS EXPENSE (Preprinted on P.36)
3. Winnings from betting (The diary codes and qualifiers are pre-printed on P.36)
5. Item coded 404 (carpets) with a value of over £50.
6. Item purchased using a CREDIT CARD during the record keeping period (except food, soft and alcoholic drink brought home - see code 8)
7. Item of expenditure to be claimed or refunded as a BUSINESS EXPENSE and dealt with manually
8. Item of food, soft and alcoholic drink brought home and purchased by CREDIT CARD during the record keeping period
9. Item of expenditure ignored for an unspecified reason
10. Item purchased using a CHARGE CARD, during the record keeping period (except food, soft and alcoholic drink brought home - see code 11)
11. Item of food, soft and alcoholic drink brought home and purchased by CHARGE CARD, during the record keeping period.
12. Interest on a credit card account if this was paid during the record keeping period. (The diary code and qualifier are pre-printed on P.36).

C. CREDIT CARD, CHARGE CARD AND BUDGET ACCOUNT, OPTION ACCOUNT & MAIL
ORDER CLUB PAYMENTS etc

(i) Credit card payments

Items purchased using a credit card during the record keeping period should have 'CREDIT CARD' written beside the entry. Enter the appropriate diary item code and qualifier (6 or 8) in the relevant columns.

If the informant has made a credit card account payment during the record-keeping period this should have been entered in the diary and should be coded 969; any interest paid should appear at Section 2 on P.36. Similarly, if there is an entry for interest the credit card account payment should appear in the diary.

Check to see if there is an entry for INTEREST and if so, check that the date of payment falls within the record keeping period. If it is outside the period delete the entry.

(ii) Charge card payments

Items purchased using a charge card during the record keeping period should have 'CHARGE CARD' written beside the entry. Enter the appropriate diary item code and qualifier (10 or 11) in the relevant columns.

If the informant has not actually written the word 'CHARGE CARD' but has just entered 'MARKS & SPENCER CARD/DEBENHAMS CARD' then assume this is a charge card and use the appropriate qualifier. If in doubt refer to supervisor.

If the informant has made a charge card account payment during the record-keeping period this should have been entered in the diary and should be coded 966.

(iii) Budget account, option account & mail order club payments etc

Items obtained from a budget account or mail order club etc during the record-keeping period should not have been entered in the diary. If such an item does appear in the diary it should be deleted ie crossed through.

If the informant has made a payment into a budget account or mail order club etc during the record keeping period it should have been entered in the diary and a description of the account written beside the entry. This should be given the same code as a charge card account payment ie 966.

D. EXPENSES REFUNDED OR CLAIMED (Pages 6-35 of the Diary)

Usually most refunds or claims on the diary pages will be abated because of answers given at Q120 (A Schedule) or Q18 or Q50 (B Schedule).

If, however, there are any other refunds or claims which are not covered by these questions then their abatement will be based on entries at P.36 of the diary (see Section E). To enable the abatement to be carried out it is necessary to check that there is a corresponding entry for each of these items on P.36. This should be done at the coding stage. If any of these items were purchased using a credit card (or charge card) they should still be given qualifier code 6 or 8 (10 or 11 in the case of a charge card) and will be abated in the normal way. It is therefore necessary to check that these items are also entered on P.36.

Do not enter qualifier code 7 against any item which is to be refunded or claimed as a business expense.

E EXPENSES REFUNDED OR CLAIMED (P.36 of the Diary)

Note

The heading in the third column: 'If food, alcoholic or soft drink brought home' is incorrect as the name of the shop should be entered irrespective of the item purchased (see left-hand page of the diary). This column will not appear in the second quarter schedules.

Coding stage

(1) If there are any items entered on P.36 check to see if they should remain there or be deleted.

(a) Items bought outside the record-keeping period

Any item bought outside the record-keeping period should be deleted.

(b) Items to be abated because of answers in the A or B Schedules

Items which are to be abated because of answers given at Q.120 (A Schedule) or Q.18 or Q.50 (B Schedule) should not be entered at P.36.

If any such items occur on this page, first check the diary pages to make sure that each item has been entered there and then delete them from P.36.

For example, if a self-employed person is claiming for vehicle expenses at Q.50 of the B Schedule, any 538, 539, 542 or 549 entries which appear on P.36 should be deleted.

(c) Items which should be entered at P.36

All items, except those described at (a) and (b), which are to be refunded or claimed should be entered at P.36. Such items include meals, drinks, taxis, bus, tube and rail fares, newspapers and postage etc.

If any such items occur on P.36 check that each item has been entered on the relevant page of the diary.

(1) After deleting any items which should not have been entered on P.36 the next step is to code the items which remain. These can be divided into four main groups:

(a) Meals, snacks and non-alcoholic drinks

Check where these were bought (ie workplace/cafe/restaurant etc) and where they were consumed (ie at home, workplace, on or off premises) and code accordingly.

(b) Alcoholic drinks

Check where these were bought (ie off licence or licensed premises eg pub, restaurant etc) and where they were consumed (ie at home or away from home) and code accordingly.

(c) Meal and drinks (combined)

Proportion according to the usual instructions. If the meal was consumed 'on premises' then assume the drink was consumed at a pub/restaurant etc. If in doubt refer to supervisor.

(d) All other items (except meals and alcoholic drinks)

If any of the items entered on P.36 are on the list of items to be shop-coded (see Section B) check whether they were purchased at one of the 12 eligible shops (see Section B) and code accordingly.

If the shop name is not given in the diary leave the shop column blank.

F EDITING

If there are any items to be abated because of answers given at Q120 (A Schedule) or Q18 or Q50 (B Schedule) or because of entries at P.36 of the diary, this will still have to be done manually.

Mileage allowance entered on P.36 (employee only)

Occasionally, a claim for mileage allowance appears on P.36. The procedure for dealing with this depends on whether the allowance is included in the person's net pay.

- (i) If included in net pay (Q.18 - B Schedule).

Check that any 538, 539, 542 or 549 items entered on P.36 also occur on the relevant pages of the diary, then delete these entries and the mileage allowance from P.36. The completion of a car sheet and the abatement of all the relevant entries in the A and D Schedules should be carried out manually.

- (ii) If not included in net pay (Q.18 - B Schedule)

If a mileage allowance is entered on P.36 of the diary (eg 400 miles @ 10p per mile = £40.00) and is therefore being claimed against the employer as a business expense, refer this to the RO.

If the RO decides that the mileage allowance should be treated as a petrol cost then the abatement should be carried out manually. Abate all the relevant entries in the diary up to the amount shown on P.36. Starting with week 1, abate the entries in the following order: codes 538, 539, 542 and 549.

The table below shows the amount spent and the abated values for two different examples. In each case the mileage allowance is assumed to be £40.00.

	<u>Example 1</u>		<u>Example 2</u>		
	Amount spent	Abated value	Amount spent	Abated value	
	(£)	(£)	(£)	(£)	
code 538	30.00	-	30.00	-	<u>Note</u>
" 539	-	-	-	-	In Example 2
" 542	5.00	-	-	-	£10 remains
" 549	8.00	3.00	-	-	unabated

G NOTES ON DIARY ITEMS

1. Cash gifts to persons IN the household

- (i) If money is given to other spenders in the household - code to 986. Payments for services to servants living in the household should be coded to 780.
- (ii) If money is given to non-spenders (under 16) in the household - treat as pocket money and code to 801. If money is given to non-spenders aged 16 or over code to 802.

2. Cash gifts and goods or services bought for persons OUTSIDE the household (excluding donations - see 798)

- (i) If money is given to another household or to friends or relatives outside the household (whether it is given to pay for a specific item or not) - code to 802.
- (ii) If an A or B schedule item is paid directly for another household - code to 802. (Do not use a 900 series code).
- (iii) If a D schedule item is paid for directly - code to the item purchased.

3. 'Informal' cash loans to persons IN and OUTSIDE the household

Money which is clearly identified as a loan should be deleted (ie crossed through) whether the money is loaned to:

- other spenders or non-spenders in the same household or
- persons outside the household eg a friend or relative.

4. Repayments of an 'informal' cash loan to persons IN and OUTSIDE the household

If the repayment of a loan is entered in the diary, then whether the money is being repaid to:

- other spenders or non-spenders in the same household or
- persons outside the household eg a friend or relative

the following procedure should be adopted:

(i) A schedule items

If the repayment relates to an A schedule item check to ensure that the details have been entered at Q87 (or Q81 if the item is a car) and enter the appropriate 900 code in the person's diary. If the details have not been entered at Q81 or Q87 refer to RO.

(ii) D schedule items

If the repayment relates to a D schedule item then the entry should be deleted (ie crossed through).

(iii) Purpose of repayment not known

If there is no indication in the diary as to why the repayment is being made and no details have been given at Q81 or Q87 then refer to RO.

5. Clothing

Code payments to clothing clubs as 966. Interviewers have been instructed to indicate the age and sex of the person for whom the item was purchased. If it is for someone in the household then the person number may be given, in which case refer to the household box for identification. Clothing allowances should be coded to 803.

6. Collections for presents

If a collection has been made for a present, code the item purchased if this is known, otherwise code to 802.

7. Expenditure for trips abroad during the record-keeping period

(i) Advance expenditure eg. holiday deposit, commission on purchase of travellers' cheques etc should be coded to the item or service eg coach tickets to Germany - code 552, visa - code 799.

(ii) Actual expenditure abroad Add up the amounts for each individual item purchased abroad, enter the total amount and code this 757, eg Total expenditure abroad (between 1/6 and 9/6) 270.00 - 757.

Delete the individual entries.

8. Food items

(i) Payments for concessionary food from an employer should be coded to the type of food purchased.

(ii) Welfare foods obtained at a reduced price should also be coded to the type of food purchased.

(iii) Food obtained from the garden (including eggs from hens) should be deleted (ie crossed through).

If the informant is a farmer or allotment holder etc and is using the food for his own consumption then this should be coded according to the item and given a qualifier code of 1 (see note 16). The prices entered in the diary should be 'farm gate prices'.

If it is known that the produce is sold any expenditure towards its production eg chicken feed, seeds etc should be treated as business expenditure and entered at the 'Expenses Refunded' section on P.36 of the diary. Any profit from the sale of this produce should be recorded at the self-employed questions (Q44-50) if this has not been done already.

(iv) Food for pets/animals is defined as any food not fit for human consumption (code 731). If food bought for a pet is fit for human consumption it should be coded as such eg fish should be coded to 134.

9. Food - composite or bulk purchases

- (i) If a composite or bulk purchase is made during the record-keeping period but only the total amount is entered in the diary (eg Groceries £52.60) refer to supervisor. This also applies to bulk-purchases of food for deep freeze.
- (ii) If 'fruit and vegetables' appears as a single entry in the diary divide the total amount equally between 'fresh fruit' (code 160) and 'fresh vegetables' (code 152).

10. Friendly Societies

These are mutual benefit insurance societies and should be coded 926.
Examples of Friendly Societies are:

Benevolent fund (unless stated to be a charity), burial club, Civil Service Sanatorium, crematorium fund, death levy, dock distress fund, family service unit, firemen's benevolent fund, HSA, Medical Aid, Mutual Aid, Oddfellows, Penny in the £ hospital fund, sick clubs.

Note that Friendly Society life assurance is not a Friendly Society but a life insurance and should be coded 924.

11. Insurance policies

If the insurance policy relates to an A Schedule item then code as such. If it is a 'one off' payment then use the relevant code. For example, holiday insurance should be coded 756 or 759 if the holiday is in the United Kingdom and 757 if it is abroad.

12. Maintenance payments for household equipment such as central heating, television etc should be coded 784-786 as appropriate.

13. Motor vehicles

New and second hand motor vehicles purchased during record keeping period should be coded 942-944 as appropriate.

14. Private entertainment (including weddings, anniversaries, bar mitzvahs, parties etc)

(i) Contract catering

If an amount of £150 or more is paid to a contract caterer for a wedding, anniversary, bar mitzvah or party etc at venues other than restaurants but including the home, then interviewers are asked to write 'CONTRACT CATERING' beside the entry.

The total amount paid could cover a number of expenses eg food, drink, entertainment, hire of hall, accommodation. Do not attempt to estimate the cost of each item but simply code the total figure to 806.

Note that contract catering for funerals should be coded to 807.

Refer to RO all items described as weddings etc which amount to £150 or more and do not have 'contract catering' beside them.

(ii) Catering provided by the household

Where the household has provided some or all of the items for the wedding etc (eg the food and drink) then they should have been individually itemised in the diary eg bread, cakes, smoked salmon, champagne etc.

If, however, the entry in the diary states 'food and drink' and no individual prices are given, then allocate 2/3 of the amount to food (code 199 or 843) and 1/3 to drink (code 269, 279 or 289), provided the total amount is less than £150. If it is £150 or more refer to RO.

Note if catering for a funeral is provided by the household then it should be treated as described above.

15. If road charges for making up a private road at the sampled address are shown in the Diary these should be coded to 224.

If the rates are paid in the Diary and it is known that they include an element for road charges, this element should also be coded 224.

16. Self-supply goods Any items that are obtained from the informant's own business should be coded according to the item but with a qualifier code of 1

17. Slot meter payments including those for second dwellings should be coded 254, 255 or 768 as appropriate except where the sampled household has its own key for the meter when it is treated as an account and coded 914, 917 or 932.

18. Tips should be given the same code as the service or item supplied.

19. Video recorders - purchase should be coded to 420 and rental to 933. Purchase and rental of blank and pre-corded video cassettes and discs should be coded to 604.

20. Winnings from betting

These should be entered at Section 3 on P.36 of the diary. If they have been entered anywhere else in the diary transfer them to P.36.

A premium bond win is regarded as a 'windfall' so it should be deleted.

H MEALS, FOOD AND DRINK OBTAINED OUTSIDE THE HOME

1. Food and drink brought home (left hand page of diary) includes any food and drink taken to another person's home and consumed there eg for a party.

Any food or drink purchased using a credit card, charge card or budget/optical account etc and brought home should have the method of payment written beside the entry. See Sections C, D and E of these instructions.

2. Take-away meals brought home

These should be at the bottom of the left hand page of the diary. Fish and chips (with or without vegetables) are coded 138. Other take-away meals such as sandwiches, filled rolls, chips on their own, "meals on wheels" etc are coded 196 or 197 as appropriate.

3. Meals out

Food bought and consumed away from home should be in the top section of the right-hand page of the diary. Different codes apply according to where the food is eaten:

- (i) Workplace, canteen meals 840-842

eg. canteen, staff dining-room, rest-room, staff tea-bar, vending machine at work. This does not have to be the informant's own workplace; it includes a workplace being visited. This also includes subsidised meals for students at college.

- (ii) Other 'On premises' 843-846

eg. restaurant, cafe, hotel, pub, snack-bar, fish and chip shop, kiosk, cinema, race course, church hall.

- (iii) Other 'Off premises' 847-854

Notes

1. Always code the detailed items of a meal if possible. For meals or parts of meals which cannot be itemised use the main "meals out" codes: 840, 843, or 848/855. If the total cost is given as well as the items make sure the total is deleted.
2. Fish and chips should be coded together whether or not priced separately.
3. If the on/off premises information is not given, assume on premises if taken with a drink, off premises if not with a drink.
4. If it is not clear whether alcoholic drink has been included with a non-itemised meal, refer to RO meals costing £10.00 or more. Assume meals costing less than £10.00 do not include alcoholic drink.

If the informant says he cannot separate the cost, apportion 2/3 to the meal and 1/3 to alcoholic drink.

These rules also apply to functions such as cheese and wine parties when the cost of alcoholic drink is not separated.

5. State School meals are dealt with in the A Schedule. If included in the Diary treat as follows:
 - (i) if entry is under 'workplace' code to 975
 - (ii) if entry is under 'cafe, etc' and school is specified as place from where bought then code to 975, otherwise code to meals out series
 - (iii) if the entry is made during school holiday periods, the entry should be coded as a meal away from home.
6. Sweets, crisps, soft drinks and beverages (such as tea, coffee, chocolate) consumed away from home should be entered in the "meals out" sections and should be given the appropriate code from the 840-854 series. If soft drinks are brought home they should have been entered on the left hand page and be coded 184. If they have been entered in the alcoholic drinks section assume they were consumed on the premises.
7. Alcoholic drinks consumed away from home should be entered on the right hand page of the diary. If the drinks were taken with a meal, 'with a meal' should have been written alongside. If the cost of alcohol was not known when taken with a meal estimate on the basis of note 4 above. Where no alcohol was consumed with the meal, this should have been indicated.

Any alcoholic drinks brought home should be entered on the left hand page.
8. Food bought where it cannot be eaten on the premises (eg. sweet stall, ice cream van on the road) but not taken home should be coded in one of the off-premises codes 847-854.

FAMILY EXPENDITURE SURVEY ITEM CODE LIST

FOOD FOR HOME CONSUMPTION

ITEM CODE	DESCRIPTION OF ITEMS	ADDITIONAL EXAMPLES
101	Bread, milk loaves, rolls	Balmcakes, baps, batch, breadcakes, butteries, Chapatis, croissant rolls, doughcake, Fadge, Flat cake, Irish potato bread, pitta, take and bake
102	Flour, plain and self-raising	Saffron flour
103	Biscuits, shortbread, wafers, (including chocolate covered)	Bandit, Breakaway, Cheese Nuts, Choc-Teacakes, Cookies, Crunchies, Gingerbread Men, Jaffa Cakes, Kit-Kat, Macaroons, Macvita, Marshmallows, Monster Munch, Novo, Oatcakes, Penguins, Rusks, Ryvita, Skips, Slimming Biscuits, Squiggles, Toasties, Twix, Waffles (excluding potato waffles - see 156), Wigwams, Yo-Yo. All corn based crisps and snacks eg KP snips, Frazzles, Sainsbury's sticks
106	Cakes and other bakery purchases Including: Composite purchases of biscuits, bread, cakes and flour etc	Apple Dumpling (pastry), Bannocks, Bracks (Irish), Bread Pudding, Buns, Cheesecake, Chorley Cakes, Crumpets, Currant bread, Frozen (cooked) cakes (eg eclairs, gateaux, sponge), Fruit pies, Malt loaf, Muffins, Parkin, Pastries Petit Fours, Pikelets, Scones, Torte Fruit, Teabread.
108	Dry cereals (including prepared breakfast cereals)	Alpen, Arrowroot, Baby cereal, Blancmange Powder, Broth cereals, Cereal bars eg Original Crunchy Bar, Coco Crispies, Cornflour, Country Store, Familia, Farex, Farinoca, Farola, Flying Start, Muesli, Nuggets, Oatmeal, Pearl Barley, Puffed Rice, Quaker Oats, Ready Brek, Sago, Semolina, Soya Flour, Spaghetti, Special K.
111	Beef and veal (including minced meat)	Beefburgers (unless meal out), beef-ham (raw), beef loaf, hamburgers, hough, minceburgers, sheet-ribs, sirloin, steaklets
112	Mutton and lamb	Gigot, Lap (breast)
113	Pork	Pork slices and cuttings, spare ribs

FOOD FOR HOME CONSUMPTION - Continued

- | | | |
|-----|---|---|
| 114 | Bacon and ham, uncooked | Belfast, gammon, ham shank, hock, knuckle, ulster fry |
| 116 | Offal and other meat
(including meat protein substitute) | Bones, chawl, cheek, chitterlings, elder, goat meat, heart, kidneys, liver, mince savour, oxtail, pig's/sheep's head, pig's trotters, protoveg, soya meat, steak and kidney (uncooked), sweatbreads, tongue, tripe. |
| 121 | Cooked ham
(including canned) | Forespur |
| | Ham which is sold as sliced or cold is normally cooked and should be coded 121. Uncooked ham is usually in the form of a joint and should be coded 114. 'Fresh' written alongside does not necessarily mean uncooked. | |
| 122 | Sausages (uncooked), sausage meat | |
| 123 | Cooked meat and meat products
canned and bottled meat

(excluding sandwiches and meals out - see 197 or 800 series; chicken, fish and meat pastes ~ see 190) | Bath chaps, beef in a bag, black/white pudding, bottled meat, bridies, brawn, brunchie, canned beefburgers, canned braised beef, canned chicken and mushroom casserole, canned cocktail sausages, canned escargots, canned frankfurters, canned meat puddings, canned sausage and beans, canned sausages, canned sliced beef, canned tongue, chicken pie, chicken pie and chips (frozen) chicken rissoles, chopped pork, cooked pork and beef, cooked sausages, cooked tongue, corned beef, delicatessen meats generally, Duo cans (eg chicken & rice) escargots (snails), frankfurters, frozen roast beef (sliced), game pie, garlic sausage, haggis, ham and egg pie, haslet, hodge, hot dogs, hot pot, Irish stew, liver sausage, luncheon meat, nealy pudding, meat croquettes, meat and potato pies, meat puddings, meat squares, pastry patties, pigs pudding, polony, pork cheese, pork fingers, pork pestle, pork pies, sausages in batter, sausage rolls, saveloy, scotch eggs, shepherds pie, sliced braised beef, span, steak and kidney pancakes, veal and ham pie. |
| 127 | Poultry, rabbit, game and venison - cooked, uncooked, canned, bottled and frozen | Capon, chicken in aspic, chickens, ducks, hares, partridges, pigeons, tandoori chicken, turkey loaf (raw), turkeys. |

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FOOD FOR HOME CONSUMPTION - Continued

156	Potato products only (including processed potatoes)	Frozen chips, hula hoops, instant potato powder, potato cakes/scones/pies/farls, potato croquettes (including croquettes unspecified), potato sticks, potato waffles, puffs, ravers, Smiths Quavers, tinned potatoes, toggles. (Exclude hot chips without fish - see 197, and hot chips with fish - see 138)
158	Potatoes (raw)	
160	Fresh fruit (including fruit undefined)	Apples, avocadò pears, bananas, oranges, pears, rhubarb, satsumas, tangerines
162	Fruit juices and tomato juice (excluding squashes - see 184)	Britvic, concentrated fruit drinks, ribena, rosehip syrup.
164	Other processed fruit - canned, bottled, dried or frozen, (including nuts)	Appletree dessert, currants, delrosa frozen apples, fruit salad, mamade, optrose, peaches, pears, pineapple, prunes, raisins, sultanas, unsweetened fruit and nut bars.
171	Tea	Herbal tea, nestea.
172	Coffee, coffee essence	Nescafe.
173	Proprietary and non-proprietary food drinks (excluding milk baby foods)	Bengers food, Bournvita, Cambridge diet food supplement, chocolate squeezy, cocoa, cocoa essence, horlicks, instant postum, malted milk, milo, nesquik, ovaltine, slender (slimming milk drink), soya milk.
181	Sugar	
182	Syrup, lemon curd, honey, jam, marmalade	Choc spread, molasses, sunny spread, treacle.
183	Ice cream	Iced lollies (if they contain ice cream), arctic roll, dark secrets,
184	Soft drinks (squashes, cordials, crystals)	Citrozade, essences for making soft drinks, lucozade, milk shake syrups, triple 'C'.

FOOD FOR HOME CONSUMPTION - Continued

134	Fish - fresh, smoked, frozen canned, bottled and buttered	Cockles, crabs, fish cakes (not cooked), fish croquettes (not cooked), frozen fish fingers, froze fish in a bag, frozen fish and chips, jellied eels, roll mops.
138	Fish and chips with or without peas - consumed at home (cooked items only)	Fish cakes (cooked), fish croquettes cooked with or without chips and/or peas, fish and chips, fish, chips and peas, fish cakes with/without peas, fish supper, fish tea, incl cases where fish and chips costed separately, fried fish.
140	Eggs, fresh and dried	
141	Butter	
142	Margarine (including margarine undefined)	
143	Fresh milk	Fresh milk, sterilized milk, ultra heat treated (UHT) milk Including milk tokens
146	Cheese	Cream cheese, cottage cheese, processed cheese, vegetarian cheese
147	Skimmed milk	Semi-skimmed milk
148	Other milk products (excluding butter - see 141 and cheese - see 146)	Buttermilk, canned and dried milk, fresh and canned cream, milk baby foods, other milk products (frozen or unfrozen) mousse, sour cream, to of the milk, yoghurt
149	Lard, cooking and other oils and fats	Clover, dripping, Flora, Gold, low fat margarines, olive oil, peanut butter, pork scratchings, shortex soya margarine, suet, trex, vegetarian fats.
152	Fresh vegetables and tomatoes (including vegetables undefined)	Broad beans, broccoli, brussel sprouts, cabbage, carrots, cauliflower, leeks, mushrooms, onions, plantain, runner beans, shallots, spring greens, spring onions (syboes)
153	Canned, bottled and dried vegetables and tomatoes	Baked beans, beetroot (excluding jar of beetroot see 193), canned vegetable juice, tomato puree.
155	Frozen vegetables	

FOOD FOR HOME CONSUMPTION - Continued

193	Pickles, sauces, flavourings, colourings, additives	Angelica, apple sauce, artificial sweeteners (eg slimcea, sweetex, sugeree), baking powder, baking soda, Bovril, breadcrumbs, candied fruit and flowers, candied peel, chicken essence, cocktail cherries, coffee mate, cooking chocolate, Cranberry Sauce, cream of tartar, curry powder and paste, dessicated coconut, drained cherries, fish dressing, flaked/blanched almonds etc, garlic, gelatine, glace cherries, gravy salt, ground almonds, herbs (eg mint, parsley), hops and malt for making home brewed beer, isinglass, jar of beetroot, Jif-lemon, King Beef (extract), Marmite, mayonnaise, mustard, nibbed nuts, oxo, parmesan, pectin, pepper, pickled foods (eg cabbage, eggs, onions, walnuts) rennet, rice paper, salad cream, salt, soup cubes/squares, soyagen (milk powder), spices (eg ground ginger, root ginger, cinnamon, all spice), sweet cake decorations, sweet and savory flavourings and essences, tomato ketchup, vinegar, yeast.
196	Cold take away food items or items not defined as hot or cold that are <u>consumed at home</u>	'Meals on wheels', meat pies, salads, sandwiches, sweet pies, 'take away meals'.
197	<u>Hot</u> take away food <u>consumed at home</u>	Chips on their own, 'meals on wheels', 'take away meals', toasted sandwiches.
199	Other food undefined	Grocery bills which cannot be separately allocated, Christmas club hamper

FOOD FOR HOME CONSUMPTION - Continued

- 185 Sweets and chocolates
(excluding chocolate covered biscuits and wafers - see 103)
- 190 Canned and packeted foods, prepared and semi-prepared
- Including:
- Canned, packeted and bottled baby, junior and geriatric foods other than milk
- Excluding:
- Cooked meat etc - see 123,
- Poultry etc eg.
Chicken Kiev,
Chinese chicken - see 127
- Chinese figs, crystallised fruits, Curly Wurly, drained and glaze fruit, (except drained cherries, glaze cherries and candied peel- see 193), Indian sweet, Marathon picnic bars, stem ginger.
- Almond paste (incl marzipan), bolognaise sauce, brandy butter, cake and pudding mixtures, canned cheese and spaghetti, canned creamed mushrooms, canned macaroni cheese, canned pease pudding, canned puddings (eg rice, treacle), canned ravioli, canned risotto, canned spaghetti sauce (eg tomato), casserole mix, cheese and onion pies, cheese or fish pancakes, cheeseburger, all cheese spreads, coleslaw, cream dessert (fool), cream topping, curry sauce, doughnuts and cakes uncooked and frozen, frozen pastry, garlic butter, hors d'oeuvres, ice cream and yoghurt powders, ice poles, ice pops, instant dessert powders, instand whip, jellies, (incl jellies set with fruit), made up stuffing (eg paxo), 'Make a meal', meat, fish and chicken pastes (ie spread), mincemeat (sweet), mixed salad, packet dumplings, packet icing, papadum, pate, peach melba/ sundaes (unless ice cream - see 183), pea fritters, pineapple fritters, pizza pie, potted meat, prawn cocktail, ravioli, ready made trifles and custard, 'Ready to heat' meals, rum butter, savour mix, skillet meal, sorbet, Tip top tinned cream, toast toppers, toasty grills, vegetable salad, white sauce, Xmas pudding.

TOBACCO

211	Cigarettes, cigarette tobacco and papers	
212	Pipe tobacco (including tobacco undefined)	Chewing tobacco, twist
213	Cigars and snuff	Whiffs, Manikins

HOUSING

- 217 Main dwelling (1) - structural space heating installation (contractor).
- Gas fired central heating, water and hot air.
- Oil fired central heating.
- Radiators and hot air systems.
- Storage heaters including under floor heating (by electricity).
- Open fires, closed fires, fireplaces, Raeburn solid fuel cooker.
-
- 218 Main dwelling (1) - structural space heating installation (do-it-yourself).
- Gas fired central heating, water and hot air.
- Oil fired central heating.
- Radiators and hot air systems.
- Storage heaters, including under floor heating (by electricity).
- Open fires, closed fires, fireplaces, Raeburn solid fuel cooker.
-
- (1) Main dwelling includes a dwelling into which the household is planning to move as its new main dwelling or a dwelling into which a household member is planning to move eg on marriage.

HOUSING - continued

- 228 Permanent second dwelling in UK (1) - repairs, decorations and replacements (as for 224) (contractor & do-it-yourself)
- Central heating repairs, insurance on structure, mortgage instalment, rates, rent, water rates, time share (running costs).
- Include installation charges for gas/electric cooker if they can be identified. (If they cannot be split from purchase price - see 411 or 413)
- Excluding:
- Rental on self catering holiday homes etc (If abroad - see 757 if in UK - see 759)
- Expenditure on new main dwelling prior to moving in (Purchase of dwelling - 221 capital improvements - 223, repairs, decorations - 224)
- 229 TV licences for a permanent second dwelling in UK (1)
- 230 Permanent second dwelling in UK (1) capital improvements (as for 223) (contractor & do-it-yourself)
- Installation of structural space heating, time share (purchase and capital improvements)
- 231 Structural additions for self assembly (excluding furniture - see 401)
- Eg flat packed goods such as double glazing units, garages, garden sheds, greenhouses, kitchen units

(1) Permanent second dwelling includes town flat, country cottage, holiday home, beach bungalow, fixed caravan etc.

HOUSING - continued

- 221 House purchase including deposit on a new main dwelling or a dwelling which a member of the household is moving into eg on marriage, but excluding the one in which the household is now residing. Insurance on structure, mortgage instalment, payments to 'Self-Build Association', private road construction charges, purchase of a garden plot/plot of land, rates, water rates.
- (exclude for rented property - see 799)
- 222 Caravan purchase (including deposit)
- 223 Main dwelling (1) - other capital improvements (contractor) Alterations for solar heating, bathroom added, built-in furniture (eg fitted wardrobes, kitchen units) car port, cement base for garage, garden shed, materials and labour costs, new garage
- (including house improvements undefined)
- 224 Main dwelling (1) - repairs, decorations and replacements (contractor) Materials and labour costs, private road repair charges, rewiring.
- (excluding central heating repairs - see 785) Include installation charges for gas/electric cooker if they can be identified. (If they cannot be split from purchase price - see 411 or 413)
- 225 Electricity account payments for a permanent second dwelling in UK (2)
- 226 Gas account payments for a permanent second dwelling in UK (2)
- 227 Telephone account payments for a permanent second dwelling in UK (2)

(1) Main dwelling includes a dwelling into which the household is planning to move as its new main dwelling or a dwelling into which a household member is planning to move eg on marriage.

(2) Permanent second dwelling includes town flat, country cottage, holiday home, beach bungalow, fixed caravan etc.

HOUSING - continued

PURCHASE OF MATERIALS AND TOOLS
FOR HOUSE MAINTENANCE

232	Hire of equipment for house maintenance	'Do-it-yourself' work on house maintenance
233	Composite or undefined purchases (codes 235-238)	
235	Fittings	All electric door bells, carpet bar/strips, curtain rail, door handles, non-electric shower fitting, fireplace wood surround, fixed clothes post, flex, hooks, lights and chandeliers, power points, ready made hardboard pelmets, sashcord, stair grips, trellis, window catch, wooden fence.
236	Tools for household repairs, maintenance, decoration and structural additions etc.	Extension ladder, lino knife, paint brushes, paint kettle, rollers, saw bench, scaffolding tubes, scrapers, step ladders, tools (unspecified), workmate.
237	Paint and distemper, wallpaper, timber and hardboard	Dadoline, hardboard to make a pelmet, shelving, wooden floor tiles.
238	Other materials	Aggregates for cement, creosote, draft excluder, emery cloth, fablon, formica, french polish, glass, glazed tiles, heavy glues, hinges, linseed oil, nails, paint stripper, paving slabs for path, pipe lagging, polyfilla/cell, polythene sheets, putty, rawlplugs, rentokil, roofing felt, roof insulation materials, sand, sand paper, screws, solder, spare parts for structural space heaters, teak oil, varnish, wire netting.

FUEL, LIGHT AND POWER

240	Anthracite and boiler fuel coal bricks, house coal, slack (excluding coke and premium smokeless fuels - see 242)	Beans, ^{dry} steam coal, multiheat, ordinary household coal used in open fires, etc. Ovoids, peas and grains, Phurnacite, stovesse and stove nuts, trebles, Welsh nuts.
242	Coke and premium smokeless fuels	Burnbrite, Cleanglow, Coalite, gas cokes other than for open fires, No Gas Coke, Gloco, hard cokes (including Sunbrite), Homefire, Phimax, Roomheat, Sebrite, Wonderco.
254	Gas, slot meter payments (see note 17)	Includes service charge payments for gas where coded in Diaries.
255	Electricity, slot meter payments (See note 17)	Includes service charge payment for electricity where coded in Diaries.
258	Other fuel and light (<u>Including</u> paraffin and fuel undefined but <u>excluding</u> fuel oil for central heating)	Calor gas, firelighters, firewood, gas refills for blow lamps/camping stoves, underfloor heating charges where source of heating unknown (Liquid paraffin - see 621)

ALCOHOLIC DRINKS (Drinks include tips and, where separable, alcoholic drinks bought with meals out.)

Alcoholic drink bought and consumed away from home - OFF LICENCES

260	Ale, barley wine, beer, shandy, stout	
261	Cherry B, cider, perry	
263	Wines (fortified)	Aperitif wines, dessert wines, ginger wine, madeira, montilla, muscatel, port, sherry, tokay, vermouth (including Martini, Cinzano), whiskey mac (including Clan Dew, Highland mac, etc)
264	Wines (unfortified)	Champagne, fruit, mead, red, rose, sparkling, tonic, white
265	Wines (unspecified)	Any wines inadequately described.
266	Spirits, liqueurs	
269	Alcoholic drink inadequately described or itemised	

Alcoholic drink bought and consumed away from home - LICENSED PREMISES

270	Ale, barley wine, beer, shandy, stout	
271	Cherry B, cider, perry	
273	Wines (fortified)	Aperitif wines, dessert wines, ginger wine, madeira, montilla, muscatel, port, sherry, tokay, vermouth (including Martini, Cinzano), whiskey mac (including Clan Dew, Highland mac, etc)
274	Wines (unfortified)	Champagne, fruit, mead, red, rose, sparkling, tonic, white
275	Wines (unspecified)	Any wines inadequately described.
276	Spirits, liqueurs	
279	Alcoholic drink inadequately described or itemised.	Round of drinks.

Note If brand names appear and no other description given, refer to supervisor

ALCOHOLIC DRINKS - continued

Alcoholic drink brought home

280	Ale, barley wine, beer, shandy, stout	
281	Cherry B, cider, perry	
283	Wines (fortified)	Aperitif wines, dessert wines, ginger <u>wine</u> , madeira, montilla, muscatel, port, sherry, tokay, vermouth (including Martini, Cinzano), whiskey mac (including Clan Dew, Highland mac, etc)
284	Wines (unfortified)	Champagne, fruit, mead, red, rose, sparkling, <u>tonic</u> , white
285	Wines (unspecified)	Any wines inadequately described.
286	Spirits, liqueurs	
289	Alcoholic drink inadequately described or itemised	Month's supply of wines and spirits.

Note If brand names appear and no other description given, refer to supervisor.

CLOTHING AND FOOTWEAR

Note: Adults' clothing is defined as clothing for persons aged 16 or over; for children aged 5-15 and for infants aged under 5. The various types of children's wear are defined as for adults.

301	Men's outerwear	All sports clothes, blazers, capes, cardigans, dressing gowns, duffle coats, jackets, kilts, kneepads, overalls, overcoats, raincoats, shirts, shorts, suits, swimming trunks, trousers, waistcoats.
305	Men's underwear & hosiery	Collars, combinations, pants, pyjamas, socks, vests.
311	Women's outerwear	All sports clothes, aprons, blazers, blouses, capes, cardigans, costumes, dresses, dressing gowns, duffle coats, gym slips, jackets, jumpers, leotards, overalls, overcoats, raincoats, shorts, skirts, slacks, suits, swimming costumes, twin sets.
315	Women's underwear & hosiery	Bed-jackets, brassieres, briefs, combinations, corsets, leg warmers, negligees, night-dresses, panties, petticoats, pyjamas, roll-ons, slips, stockings, suspender belts, socks, tights, vests.
321	Boys' outerwear	
322	Boys' underwear & hosiery	
325	Girls' outerwear	
326	Girls' underwear & hosiery	

CLOTHING AND FOOTWEAR - continued

330	Clothing materials	Leather to make clothes, materials for school sewing
331	Men's and boys' headgear	
332	Haberdashery Including: items of repair for clothing, women's & girls' headgear and headgear undefined	Belts, berets, braces, buttons, caps, darners, embroidery silks, garters, gloves, handkerchiefs, hats, insoles, knitting wool and needles, laces, needles and threads etc, nightdress case, patterns, pins, ribbons, scarves, school badges, sewing - cotton, tape measure, ties, webbing, zips.
335	Infants' outerwear (Excluding bedding - see 407)	Hats, mittens, pram sets.
336	Infants' underwear and socks (Excluding disposable nappies - see 621)	Babies' nappies, (terry and muslin) bodices, knickers, pants, pyjamas, vests.
337	Clothing charges	Hire of clothing, dressmaking charges (excluding repairs and alterations) dress-making dummy
338	Miscellaneous purchases of clothing (Excluding clothing allowance see 803)	
341	Men's footwear	Boots, shoes, slippers, trainers wellingtons.
342	Women's footwear	Fur bootees, leggings (mock boots), shoes, slippers, trainers.
343	Children's and infants' footwear	Daps, trainers
349	Footwear undefined.	

DURABLE HOUSEHOLD GOODS

401	New and second-hand furniture (non built in furniture only)	Beds, bedroom/dining room suites, chairs, kitchen and bathroom cabinets, tables, table sewing box, TV and video cabinet.
404	Floor coverings (including laying and making up charges)	Carpet tiles, coir matting, flooring tiles (vinyl, plastic and rubber), jute carpets, lino sticky tape, mats and matting, needle loom, rubber - backed carpet, rugs, rug wool, sheepskin rugs, sheet plastic flooring, tufted carpets, underlay.
405	New and second-hand house textiles, (including making up charges)	Adhesive binding, bedspreads, blankets, curtain materials, cushion covers, dishcloths , duvets/ continental quilts and covers, eiderdowns, rufflette tape, rydura dusters, sheet (including rubber), table cloths (including plastic), tea cosy, tea towels.
407	New and second hand mattresses	Baby's changing pad, bolsters, cot/pram mattresses, cushions, kapok, pillows.
408	Purchase and rental of TV games	TV games console
409	New and secondhand cassette/ tape recorders, radios, record players, televisions (Excluding non-essential CB equipment - see 422)	Amplifiers including fitting, antenna, essential equipment for CB radio (aerial, power supply and transceiver), hi-fi equipment, music centre, personal stereo, radio clock, speakers, tuners, TV and radio aerials (purchase, rental and cost of fitting)
410	Purchase of home computers	Printers.
411	New and secondhand gas cookers (including gas cookers with electric ignition/timing device etc)	Hob, built in oven. Include installation charges if they cannot be split from purchase price. (If they can be identified - see 224 for main dwelling or 228 for second dwelling)
413	New and secondhand electric cookers	Hob, built in oven, Include installation charges if they cannot be split from purchase price. (If they can be identified - see 224 for main dwelling or 228 for second dwelling)

DURABLE HOUSEHOLD GOODS - continued

414	Telephones and telephone answering machines	Attachments for telephone, beepers (if purchased)
417	New and secondhand electric washing/drying machines	Drying cabinets, spin dryers, tumble dryers.
419	New and secondhand electric refrigerators, freezers	
420	Purchase of video recorders (excluding cassettes, discs and accessories - see 604)	
422	Spare parts for cassette/tape recorders, home computers, radios, record players, televisions, TV games and videos	Non-essential equipment for CB radio, (excluding aerial, power supply and transceiver - see 409), transistors, valves
423	Spare parts for gas and electrical durables	Electric sewing machine needles
425	Other gas appliances (new and second hand)	Fires (ordinary or convector) hair curling tongs/styling brushes (including gas refills), pokers, refrigerators, wall-mounted shower units, water heaters and boilers
426	Other major electrical appliances (new and second hand)	Dishwashers, fires (conventional plug-in or convector), lawnmowers (excluding manual and petrol driven - see 434) microwave cookers, vacuum cleaners, wall-mounted shower units, water heaters and boilers
427	Electrical tools (new and second hand) (including electrical tools undefined)	Drills, paint sprayers, paint strippers, saws.
428	Small electrical/electronic equipment (new and second hand)	Burglar alarms (battery or electric) calculators, hair dryers, hair curling tongs/styling brushes, lamps (bedside, standing and table) shavers/toothbrushes (battery or electric), typewriters
431	China, glassware and pottery (excluding mirrors)	Pyrex ware

DURABLE HOUSEHOLD GOODS - continued

- | | | |
|-----|---|--|
| 434 | Major household appliances
not powered by gas/electricity

(including major appliances
undefined) | Carpet sweepers, fire extinguishers,
garden furniture, garden rollers,
garden (and beach) umbrellas,
knitting machines and ribbers,
lawnmowers (excluding electric - see
426) non-electric calculators/sewing
machines/typewriters, oil-fired
cookers and water heating systems,
paraffin and other non-structural
space heaters, petrol-powered
electric generators, picnic tables,
rotavators, water softeners,
wheelbarrows. |
| 437 | Electrical consumables | <u>Batteries</u> (dry cell), Christmas
lights, fuses, fusewire, infra red
bulbs, light bulbs, plugs and
adaptors (excluding those designed
for a specific purpose or appliance) |
| 438 | Garden tools and accessories | Garden gloves, garden hose, handbills,
hedge clippers, hoes, scythes,
shears, watering-cans, |
| 439 | Kitchen equipment, tableware,
utensils and cleaning
materials

(eg <u>J-cloths</u> , scourers,
sponge cloths, and steelwool) | Bake stone, baking tin, bowl, bread
bin, bread board, chopsticks,
colander, cutlery, <u>dish cloths</u> ,
fish slice, frying pan, kettle,
kilner jar, masher, milk cooler,
napkin ring, oven gloves, pastry
brush, potato peeler, pressure
cooker, sandwich box, saucepan,
strainer, teapot spout, teapot stand,
tin opener, tray, tray set, vacuum
flask, wine-making apparatus, wooden
salad bowl and servers |
| 440 | Other household hardware | Basin, bathbrush, bathroom scales,
brass log box, brooms, cash box,
chamois leather, clothes brush,
clothes horse line, clothes prop,
coal scuttle, coat hangers,
doorstop, dustbin, dustpan,
fireguard, fire-irons, flints, foam
filling for cushions, gas lighters
gas mantles, household oil,
industrial gloves, ironing board,
keys, lamp shades, (incl. materials
for making) laundry basket, metal
bath, mops, mousetraps, odd pieces of
hose, padlocks, pail, peg bag, pegs,
penknife, place mats, plastic foam
for kneeler, rope, scissors, shoe
horn, shoeshine sets, sink plug,
soap holder, sparklets/gas refills,
for soda stream, table top for
washing machine, tilley lamp,
torches, tub, venetian blinds, waste
paper basket, wick for oil lamp or
stove |

VEHICLES

501	New cars	Motor vans used for private) A purposes) Schedule)
502	Second-hand cars	) H.P.) cases
503	New and second hand motor cycles	Motor assisted cycles) only)
505	Other new and second-hand vehicles	Bicycles, BMX, canoes, carrycots, dinghies, go-karts, motor cruisers, prams, trailers, tricycles, wheel- chairs (manual or battery driven) yachts.
508	Repairs and other service charges to vehicles other than cars and motor cycles	Boat house hire, cycle garage fee, push chair/cycle hire.
510	Motor-cycle accessories, parts and replacements (new and second-hand)	Crash helmet, motor-cycle paint.
511	Other vehicle accessories, parts and replacements (new and second-hand)	Cycle clips, outboard motors, paddles, pram harness, pram straps.
512	Driving licences	
513	Cars - durable accessories and fittings (new and second hand)	Car radios, cassette players and telephones, licence holders, seats and seat covers for babies and children
514	Cars - spare parts and replacements (new and second hand)	Brake fluid, car paint
538	Petrol	
539	Diesel oil	
542	Other motor oils	Gear box oil
545	Garage rent, rates (if separate), and ground rent	
546	A.A. and RAC subscriptions	Other non-profit making motoring associations (eg Civil Service Motoring Association)
548	Car and motor-cycle repairs and servicing	Labour and material costs should not be split, Car battery charging.
549	Other car and motorcycle costs	Anti-freeze, car polishes, distilled water for car batteries, engineers' reports, garaging, gas to power cars, MOT tests, parking fees, shampoos, tolls, tools for motor vehicles, underseal.

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TRAVEL

550	Combined Bus/Rail/Tube tickets. (excluding season tickets)	One day capital card, one day travel card, any travel on a ticket covering a combination of bus and rail, bus and tube or metro and all three.
551	Rail or tube fares (excluding season tickets)	Train/boat ticket, reservation of railway seat, S/Citizens' rail fare card, OAP passes. This includes combined rail and tube or metro.
552	Bus, coach fares (regular services only) (excluding season tickets)	OAP passes, tram, trolleybus.
553	Air travel	
554	Water travel (excluding season tickets)	Ferries, hovercraft, river bus.
555	Taxis, including hired cars with driver	
556	Hire or self-drive cars	Car leasing. Expenditure on the motability scheme. Mileage charges for use of firm's car for private purposes.
557	Monetary contribution towards cost of travel in friends' etc vehicle.	
558	Other personal travel	Coach tours and excursions (including the cost of meals and drinks if they cannot be coded separately), private bus, ski lifts/tows and cliff lifts
560	Transportation eg furniture delivery (excluding expenses of moving house - see 804)	Charge for delivering items of furniture etc from shop, or for moving items from one house to another, transport of baggage and animals, transport of car by air, rail or sea.

Jan 88

OTHER GOODS

601	New and second-hand musical instruments and parts.	Hire of musical instruments, synthesizer.
603	New and second-hand audio cassettes and records, TV game and home computer cassettes, etc.	Cassette cases, "dustbugs". Purchase and rental of TV game, home computer and audio blank and pre-recorded cassettes and accessories. Record cases, record rack, record tokens.
604	Purchase and rental of video cassettes, and accessories	Blank and pre-recorded video cassettes.
611	Spectacles (NHS and other)	Contact lenses
621	Medicines and medical aids (including items undefined as NHS or other but excluding NHS - see 625)	All medicated sweets eg Tunes, Lockets, Ayds (slimming tablets), babies' bottles, baby wipes, Bemax, bottle teats, calamine lotion, clinical thermometers, cod liver oil, contact lens soaking fluid, Complian, contraceptive pills, cough sweets, Dettol, disposable nappies, elastic stockings if not NHS, Froment, glucose, hearing aid battery, hearing aid rental, insect repellent, Lipsil, liquid paraffin Metercal, Milton, nappy liners, sanitary towels, slippery elm food, spectacle cleaning fluid/cleaning cloth, surgical goods and dressings, TCP, teething ring, Virol, vitamin tablets, wheatgerm.

OTHER GOODS - continued

- 631 Games, Toys and Pastimes
(excluding equipment for hobbies see 634, and sports see 641)
Babybouncers/walkers, balloons, card games, chess, Christmas stocking (containing toys/sweets), crackers, darts, dominoes, draughts, fireworks, child's paint box, playing cards.
- 632 Photographic and optical goods
(excluding spectacles - see 611)
Binoculars, cameras, (including video cameras), developing and printing equipment, flashbulbs, films and charges for developing and printing, light meters, magnifying glasses, microscopes, opera glasses, photographic album, projector, school photographic material, all sunglasses except those stated to be NHS, telescopes, tripods.
- 634 Hobbies
All items bought for hobbies, artists' materials, coins/medals other than precious metals (see 649), scraper board, stamp albums, stamp collecting.
- 641 Sports goods
(excluding sports clothes - see clothing (outerwear))
Bait, camp bed, camping equipment, camping stoves, canvas beach huts, cartridges, cricket equipment, echo sounder and battery, exercise kit (body trimmers, trim wheels, slimming aids, which could be used as exercise machines), fishing equipment, footballs, Freezella, golf clubs/balls, golf gloves, handwarmer, lifebelt/jacket, pellets, roller skates, sleeping bags, tennis, squash and badminton racquets, tents, whistles
- 642 Leather and travel goods
Baby basket, baby carrying harness, brief cases, handbags, jewel case, school haversack/satchel/bag, sewing case, shopping bag-on-wheels, shopping bags (not carrier), shopping baskets, shooting sticks, spectacle cases, suitcases, trunks, umbrellas, vanity case, walking sticks, wallets

OTHER GOODS - continued

- 645 Smokers' requisites Ashtrays, cigar boxes, cigarette cases, lighters, lighter fuel and gas refills, pipes, pouches
- 646 Decorative fancy goods Artificial flowers, birdbaths, fancy china bowl/flower pot, joss sticks, mirrors, optic lights, ornaments, pictures and picture frames, plastic flower pot holders, posters, vases, works of art
- 648 Stationery (personal and household) Aluminium foil, artificial Christmas tree, bin liners, binders for mags, calenders, cardboard folders, carrier bags, charity stamps/cards, Christmas decorations cocktail sticks, candles (including birthday cake candles), digital watch pen, drinking straws, football card photos, gloy, glucine, greaseproof paper, ink, jampot covers, kitchen rolls, lighter types of glue, paper decorations, paper napkins/doyleys, pencils, pens, polythene bags, rulers, scrap book, string, 'Stretch & Seal', tinsel, typewriter ribbons, wrapping paper, writing paper/envelopes.
- 649 Personal effects (Including jewellery, watches, and personal silverware) Coins and medals made from gold or platinum, compacts without powder, cufflinks, hip flasks, scent bottles, spectacle chains
- 650 Household articles (including household silverware) Barometers, electric or wall clocks, silver cutlery, silver tea service, telephone timers, thermometers (excluding clinical thermometers see 621)
- 721 Books (including school and text books but excluding library subscriptions - see 799) Address books, autograph albums, book club, book tokens, catalogues, cookery cards, diaries, horoscope (book form only), learned journals, maps, music tutors, painting books, patterns in books, programmes, sheet music, telephone book, timetables.
- 722 Newspapers Including delivery charge.
- 723 Magazines/Periodicals Knitting or needlework patterns in magazines, story teller (magazine and cassette combination).

OTHER GOODS - continued

731	Food for animals and pets, (not fit for human consumption)	Fish-heads, horsemeat, Lassie, lights, Trill budgie food.
732	Other expenditure on animals and pets	Kennel club, medicine, nosebag for horse, purchase of pets and equipment, registration of animals, rent for horse field, sand, vet's fees.
733	Seeds, plants, flowers (excluding all fertilisers - see 734)	Compost, flower-pots, gardening clubs, gardening stakes, peat, real Christmas tree, rents for allotment, weed-killer.
734	Plant fertilizers, (liquid pellet and powder) natural manure (excluding peat - see 733)	Agricultural salt, All Seasons Lawn Food, Baby Bio, Bio Tomato Food, bone meal, Crop Booster, dried blood, Garden/Rose/Lawn "Plus", Growmore granular, gypsum, Hoof and Horn, hop manure, Home grow, John Innes Base (fertilizer), Kerigrow, lawn sand/food (but not weedkiller), Liquinure, Maxicrop, nitrate of soda, Nitro chalk phosphates, Phostrotabs, Phostrogen, Plantoids, Rose food, special compound (fish), sulphates (iron, potash, ammonia), Tomorite, Toprose, Vitax Q4.
742	Matches, polishes and cleaning materials	Abrasive powders, ammonia, Brillo pads, dishwasher salt, disinfectants, Domestos, dyes, fabric conditioner (eg Comfort), flash, insecticide, methylated spirits, Nappisan, polishes, record cleaning cloth, soda, shoe cleaning materials, starch, sulphur candle, turpentine.
745	Toilet soap	Infacare.
746	Other soap and soap products	Dirty paws, Stergene, Swarfega, washing powder.
750	Miscellaneous goods not assignable to any other code	Beach hut (if <u>canvas</u> - see 641), distilled water not specified as for car batteries, gift vouchers (purpose not specified), globe map (unless antique), headstone, ice for freezer, masonic regalia.

SERVICES

751	Postage,	Giro charges. parcel post, postal order poundage (£1 or less - 22p; £2-£10 - 36p eg PO for £15 would cost 72p)
752	Telephone (excluding telephone accounts - see 930)	Phone cards, telemessages
753	Dances (admission) and miscellaneous entertainment	Amusement machines, beetle drives, castles, country houses, dinner dance/supper dance (25% to dance admission, 50% to food and 25% to drink - see note 20), discotheques, exhibitions, fashion shows, flower shows, fun fairs, holiday school play schemes, horoscopes, horse shows, juke box, museums, night clubs, spectator at airports, tickets for social, trips round the bay, visits to Father Christmas, whist drives, women's fellowship (including tea and biscuits), Youth Club entrance fees, zoo's
756	Package and non-self catering holidays in U K	Holiday camps, hostel charges, money for board to relatives
757	All holidays <u>outside</u> UK (excluding money invested abroad eg purchase of holiday bungalow)	Green card (car), holiday insurance international driving licence. Commission on purchase of travellers' cheques (min charge £2.50 or 1%) and foreign currency (£1.25 per transaction). The value of the cheques or currency should <u>not</u> be coded.
759	Self-catering holidays in UK	Camping site fees, hire of accommodation (eg caravan for self catering holidays), savings for children's holidays arranged by school (if place known then code 756-757 as appropriate).
761	Cinema	
763	Theatres, concerts, circus	Amateur shows, folk group, jazz club (entrance and subscription), theatre agent's fee.
764	Participant sports and specialised pastimes (<u>including</u> subscriptions to sports and social clubs, ad hoc admission and similar charges but <u>excluding</u> residential attendance at health clubs/farms - see 775)	Band levy, billiards, boat hire boating, brass rubbing charges, darts, fee for model, fishing licences, permits and trips, greyhound and pigeon racing, health club activities (eg sauna, solarium), rental for stretch of river, showing animals, skating, snooker, swimming, tennis (use of public court) weight lifting/training

SERVICES - continued

765	Spectator sports (including football admission)	Boxing, cricket/football/rugby/ tennis matches, horse/dog/speedway/ stock car racing, school sports, swimming, wrestling.
768	TV, Radio, TV games console, slot meter payments (see note 17)	Exclude rental of audio cassettes - see 603, and video cassettes - see 604
770	Stamp duties to Central Authorities	Birth certificate, driving test fee, import duty, passport, search fee at St Catherines House.
772	Licences (excluding TV and driving licences)	
773	NHS payments for dental and other services (excluding spectacles see 611)	Amenity hospital bed.
775	Private medical, dental and optician fees (Including items undefined as NHS or other but <u>excluding</u> spectacles - see 611)	Artificial teeth, chiropodist, ears pierced, eye tests, family planning clinic, health clubs/farms (residential attendance), medical certificate fee, nursing home and convalescent fees, repairs to spectacles.
780	Domestic help (including window cleaning)	Baby sitter, gardener, NI contribution paid for domestics by employer, playgroups, private and local authority nurseries for children, sweep
782	Repairs to footwear and materials for home repairs (Excluding repairs to football boots and other sporting footwear - see 788)	Staining footwear
784	Repairs and maintenance to cassette/tape recorder radio, television, video, TV game, home computer and musical instruments.	Insurance maintenance contracts, insurance against theft for rented items, tuning piano.
785	Repairs and maintenance to central heating systems	Insurance premiums (applies only when 'central heating' is written beside the entry in the Diary)
786	Repairs and maintenance to other gas, electric and oil appliances (not account)	Servicing, freezer maintenance insurance premiums
787	Repayment of loans to clear other debts	

SERVICES - continued

788	Repairs to personal goods and repairs not codable elsewhere (excluding medical repairs - see 773 or 775)	Cigarette lighter, clocks, clothing, eiderdown recovering, football boots and other sporting footwear, fountain pens, furniture recovering, jewellery, lawn mowers (not electric), mattress repairs, scissors, skates sharpened, teapot resilvered, umbrella, watches.
789	Interest on Credit Card	This code is used in the D schedule only (P.36)
790	Cleaning and Dyeing	Cleaning fur coat, dyeing footwear.
791	Laundry, launderette and hire of washing machine	Bagwash, deductions from pay for washing overalls, self service dry cleaning.
793	Hairdressing, manicure, beauty treatment	Diathermy, hairdressing club, hair pieces and wigs (excluding NHS - see 625)
796	Subscriptions to trades union, professional associations, etc	Contributions to strike funds.
797	Other subscriptions	Choir fund, conference fee, National Trust, Ratepayers Association, Veterans Motor Club, Weight Watching Club, youth/social/welfare, working men's/masonic/buffaloes/Scout/Guide clubs.
798	Charitable gifts	Benevolent funds, Bob-a-job, charitable organisations (including donations), church collections, entrance to bazaar, entrance to jumble sale, pew rent, school fund.
799	Miscellaneous expenditure on services not assignable to any other code. (Including rent on property prior to moving from present home)	Banns, bank counter charges, bleepers (if rented) cloakroom charges, do-it-yourself job with a friend's help, emptying cess pit, hire of deck chair, left luggage charges, library subscriptions and fines, management charge for bill paying services (eg Housewise, Safe Homes, Secure Homes) newspaper adverts, parked motor vehicle towed away by police, passport, payments to Medical Alert Foundation, platform ticket, public baths (not swimming), rental (eg holiday TV, vacuum/carpet cleaner, video camera), storage, turfing grave, visa.

MISCELLANEOUS

- 801 Children's pocket money.
- 802 Cash gifts and goods or services bought for persons outside the household (see note 2).

(including tips not assignable to other codes but excluding donations - see 798)
- 803 Savings
- 804 Expenses of moving house
- 805 Legal fees
- 806 Private entertainment (see note 14)
- 807 Funeral expenses (see note 14)
- 811 Stakes- football pools
- 812 Bookmakers, betting shops, totalisator
- 813 Lotteries
- 814 Other betting
- A schedule items paid direct, collections for presents (if present is known use the appropriate item code), money gifts to friends/relatives outside the household.
- ('D' schedule items paid direct should be coded to the item purchased)
- Clothing allowance, Christmas party money, defence bonds, deposit accounts, deposits in savings banks, investments in building societies, loan club/Co-op Savings Stamps, premium bonds, save as you earn, savings certificates, savings seals, savings/slate/holiday/Christmas/office clubs, school bank, stocks and shares, tontine, unit trusts.
- Estate agents bills, removal fees (where they include labour), storage charges connected with a move, surveyors' and valuers' fees.
- Executors' fees and expenses, payments to legal institutions and legal departments of banks, payments for legal aid, solicitors' fees.
- Contract catering (not in a restaurant) for anniversaries, bar mitzvahs, parties and weddings (excluding funerals - see 807) fees for performers, group travel, hire of accommodation.
- Contract catering for funerals, fees paid direct to clergymen and cemetery authorities, funeral director's fees, grave maintenance charges (refer to R0), hire of hearses.
- Bingo (including admission charge) fruit machines, office "tote" pontoon, raffles, sweepstakes.

MISCELLANEOUS - continued

- 821 Winnings - football pools
- 822 Winnings - bookmaker, betting shop, tote
- 823 Winnings - lotteries
- 824 Winnings - other betting (bingo, sweepstake etc)

FOOD BOUGHT AND CONSUMED AWAY FROM HOME

Item	Examples	Where eaten		
		Workplace	All other	
			On premises	Off premises
Fish and Chips (cooked items only)	Cooked fish, cooked fish fingers, cooked fish cakes, cooked fish croquettes, cooked fish roes, etc. Any of the above on their own or with chips, peas, etc. Items described as fish-tea, fish-supper, etc.	840	843	847
Meals out including salad	<ol style="list-style-type: none"> 1. Non-itemised entries described as 'meal', 'meal out', 'breakfast', 'lunch', 'dinner', 'supper', 'snack', 'sweet', 'dessert'. 2. Miscellaneous entries including: <ol style="list-style-type: none"> a. cooked meat and meat products not in roll or sandwich (see list at code 123). Including hot dogs, hamburgers. b. shell fish. c. chips on their own d. chips priced separately EXCEPT WITH FISH AND CHIPS. e. tuck shop (undefined) f. soup on its own g. pizza. 	840	843	See 'Food bought and consumed away from home - off premises' page

FOOD BOUGHT AND CONSUMED AWAY FROM HOME (continued)

Item	Examples	Where eaten	
		Workplace	All other
		' On premises	' Off premises
Specified other foods (continued)	Yoghurt.	840	854
	Cheese, including Cheese and Biscuits.	846	
	Iced lollies (without ice cream or unspecified whether includes ice cream), ice pops, ice poles.		

FOOD BOUGHT AND CONSUMED AWAY FROM HOME (continued)

Item	Examples	Where eaten		
		Workplace	All other	
		' On premises	' Off premises	
Sandwiches, rolls with filling; cakes, currant bread, fruit pies, pastries, scones etc.	Include apple dumpling (pastry), bannocks, bracks (Irish), bread pudding, buns, cake (eg gateaux, eclaires, sponge), cheesecake, chorley cakes, crumpets, malt loaf, parkin, petit fours, pikelets, teabread, toasted sandwiches, torte.	841	844	See 'Food bought and consumed away from home - off premises' page
Non-alcoholic drinks other than soft drinks juices.	Tea, coffee, milk, drinking chocolate, horlicks, tea clubs, etc.	842	845	850
Soft drinks excluding fruit juices.	Orange squash, cola, lemonade	840	846	851
Ice cream	Iced lollies (if the contain ice cream), tubs, cornets, Arctic Roll, Dark Secrets	840	846	852
Sweets and chocolates	Exclude wafers, chocolate biscuits, etc. (see Specified other foods)	840	846	853
Specified other foods	Potato crisps and potato products. Fruit Nuts and dried fruit Fruit juice. Biscuits, wafers, short-bread, chocolate coated.	840	846	854

FOOD BOUGHT AND CONSUMED AWAY FROM HOME-OFF PREMISES

ITEM	EXAMPLES	EATEN OFF PREMISES
<p>Hot meals out INCLUDE MEALS OUT <u>NOT DEFINED AS HOT OR COLD</u></p>	<ol style="list-style-type: none"> 1. Non itemised entries described as meal, meal out, breakfast, lunch, dinner, supper, sweet, snack, dessert. 2. Chips on their own. 3. Chips priced separately EXCEPT WITH FISH AND CHIPS. 4. Soup on its own. 5. Pizza. 	855
<p>Cold meals out etc <u>DEFINED AS COLD</u></p>	<ol style="list-style-type: none"> 1. Non itemised entries described as meal, meal out, breakfast, lunch, dinner, supper, sweet, snack, dessert. 2. Salad. 3. Shell fish. 4. Tuck shop. 	848
<p>Toasted sandwiches, hot rolls with filling, hot meat and sweet pies etc. <u>DEFINED AS HOT</u></p>	<p>Meat pies, fruit pies, cooked meat and meat products not in roll or sandwich (see list at code 123) including hot dogs, hamburgers.</p>	856
<p>Cold sandwiches, cold rolls with filling, cold meat and sweet pies, etc. <u>DEFINED AS COLD OR NOT DEFINED AS HOT OR COLD</u></p>	<p>Meat pies, fruit pies, cooked meat and cooked meat products not in roll or sandwich</p>	857
<p>Cakes, currant bread, pastries, scones, etc.</p>	<p>Include apple dumpling (pastry), bannocks, bracks (Irish), bread pudding, cheesecake, Chorley cakes, crumpets, malt loaf, parkin, Petits Fours, pikelets, teabread, torte.</p>	849

'A' AND 'B' SCHEDULE ITEMS

901	Rent/rent including rates	
903	Rates	
904	Water rates	
907	Service charges, Ground rent	Feu duty, (Scotland), chief rent, compulsory or regular maintenance site rent for caravan (sampled ad
910	Mortgage payment	Interest, Interest and principal/
913	Central heating oil	
914	Gas account	) Exclude any rental of appliances) maintenance)
915	Gas board budgeting payment))
917	Electricity account	) Include standing charges, meter r) installation)
918	Electricity board budgeting payment))
920	Structure insurance	Include insurance on structure, fi and contents where they cannot be
921	Contents insurance	Premium on furniture and contents premium on personal possessions in furs, jewellery, TV. (Exclude maintenance contracts)
922	Mortgage protection policy	
923	House endowment	
924	Life insurance	Friendly Society life assurance, endowment and endowment undefined education endowment, fixed term a death and burial. (Exclude house endowment - see 92
925	Medical insurance	BUPA, HCS, PPA, PPP, WFA
926	Other insurance	Accident insurance, animal insuran Friendly Societies' sickness insu: rentokil insurance, works' sick c: (Exclude Friendly Society life as: see 924)
927	Private personal pension	
930	Telephone account	Include telephone stamps, telephon budgeting payment

'A' AND 'B' SCHEDULE ITEMS - continued

932	TV rental		Include TV set, cable TV, home computer combined TV and video rentals
933	Video recorder rental		
935	TV licence		Include TV stamps
940	Vehicle insurance		
941	Vehicle tax		Include vehicle tax stamps
942	Outright new car purchase		Include unspecified whether new or secondhand
943	Outright secondhand car purchase		
944	Outright motorcycle purchase (new and secondhand)		Motorcycle, motor scooter, moped
950	Season tickets, BR only)	
)	
951	Season tickets, combined bus/BR/tube	)	Exclude travel for children to <u>State</u> schools
)	
954	Season tickets, all others)	
960	Loan instalment payment		
963	HP or credit sale instalment payment		
966	Club instalment payment		Budget or option account, Chargecard account, Check trader, Club run by a sh Mail order club/organisation
969	Credit card payment		Access, American Express, Barclaycard, Diners Club, Trustcard, Visa
970	Bank service charges		Exclude interest
975	School meals)	
		)	Only for children attending <u>state</u> school
977	School bus or train travel)	
980	Fees or maintenance for educational courses	)	For persons <u>in</u> the household
)	
981	Fees or private tuition for leisure courses	)	For persons <u>in</u> the household
		)	Exclude membership fees, playgroup, day nursery
)	
984	Fees or maintenance for educational courses	)	For children aged 16-24 <u>outside</u> the household
)	
985	Maintenance or separation allowance		

